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## Naturally Healthy Beverages in Australia

### PROSPECTS

#### Kombucha Continues to Increase in Availability and Popularity

Naturally healthy beverages enjoyed ongoing growth in 2019. One of the main drivers of the category was naturally healthy ready-to-drink (NH RTD) tea, thanks to the growth of Kombucha and its association and health positioning as supporting gut health. The range of Kombucha products available at supermarkets and in the on-trade is rising, making it increasingly accessible to a wider audience and in turn stimulating sales across Australia. Other NH RTD tea is also expected to see considerable growth over the forecast period as consumers enjoy having healthier beverage options available to them.

#### Health Positioning Stimulates Strong Value Growth for NH Superfruit 100% Juice

NH superfruit 100% juice also performed well in 2019 in current retail value terms, mainly thanks to their health positioning. This is exemplified by the leading brand Chiahh by Bickford Australia, which is available in three variants: Vitality, Balance, and Restore. All three products are promoted as containing fiber and Omega 3 due to the inclusion of chia seeds, which are promoted as having a natural ability to increase stamina and energy. NH superfruit 100% juice is expected to continue seeing significant growth over the forecast period as consumers embrace the health benefit claims of these beverages.

#### Growth of NH Carbonated Natural Mineral Bottled Water Supported by Rising Health Consciousness

In light of the growing demand for healthier beverage alternatives, consumers are increasingly shifting towards bottled water. As a result, consumption of NH carbonated natural mineral bottled water recorded strong growth in 2019 and remained important to the overall NH beverages category. However, branded players are set to face competition from private label over the forecast period as supermarkets are likely to promote aggressively their private label products, which could lead to a slowdown in value sales growth.

### COMPETITIVE LANDSCAPE

#### Lion Retains Top Spot in Naturally Healthy Beverages During 2019 Despite Contracting Share

Lion remained the leading player in naturally healthy beverages in 2019. However, its share declined year-on-year throughout the review period. Within NH 100%, the company's share declined over the review period, while Nudie Foods Australia saw strong share growth, with consumers appreciating the health positioning and unique flavour variants of Nudie juice products. As a result, Lion mainly owes its leading position to its juice portfolio, which includes brands such as Berri, Just Juice, Daily Juice, and Mildura.

Table 1 Sales of NH Beverages by Category: Value 2014-2019

AUD million	2014	2015	2016	2017	2018	2019
NH Hot Drinks	212.0	216.2	221.3	228.4	224.6	220.8
- NH Tea	110.2	116.5	122.6	129.3	129.4	129.7
-- NH Fruit/Herbal Tea (Data Check)	61.8	65.0	69.7	74.7	75.7	77.7
-- NH Green Tea (Data Check)	45.2	48.2	49.6	51.2	50.2	48.4
-- NH Other Tea	3.2	3.3	3.3	3.4	3.5	3.6
- NH Other Hot Drinks (Data Check)	101.9	99.8	98.7	99.1	95.2	91.2

### Coca-Cola Amatil Maintains a Steady Share in Naturally Healthy Beverages

Two-thirds of value sales within NH carbonated spring bottled water were attributable to Coca-Cola Amatil in 2019. Within other NH RTD tea, the company accounted for almost a quarter of off-trade value sales. However, this was a serious decline from the start of the review period, with the decline intensifying mid review period due to the diminishing share of its Fuze Tea brand. However, since the company's acquisition of Organic & Raw Trading Co, the owner of the Mojo Crafted Kombucha brand, its share within other NH RTD tea is expected to rise over the forecast period.

### Growth for Nudie Foods Australia as Consumers Value 100% Juice Made from Local Ingredients

Nudie Foods Australia saw its share within NH 100% juice increase year-on-year throughout the review period as consumers valued the freshness of the company's products and its use of local fruit. For example, the company's "Nothing but 2l oranges double pulp" uses 2l Australian oranges, with the listing of ingredients appealing to Australians who appreciate transparency about the ingredients used in their beverage products. The company's products are positioned as more premium juice products comprised of "nothing but" the fruit (and vegetable) ingredients required for the juice blend. New product developments towards the end of the review period included Nudie Nothing but Winter Goodness, a limited-edition juice variant incorporating pink grapefruit and apple. ■



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