

# CITRUS FRUIT JUICES MARKET

INDIA FORECAST TO 2027

BY TYPE (FRUIT DRINKS, 100% FRUIT JUICES (NFC), NECTARS), FRUIT TYPE (ORANGE, LIME/LEMON, GRAPES, MIXES AND OTHERS), PACK TYPE, PACK SIZE, AND DISTRIBUTION CHANNEL

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## TABLE OF CONTENTS

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<b>1</b>	<b>INTRODUCTION.....</b>	<b>16</b>
1.1	STUDY OBJECTIVES.....	16
1.2	MARKET DEFINITION.....	16
1.3	STUDY SCOPE .....	17
1.3.1	INCLUSIONS AND EXCLUSIONS .....	17
1.4	PERIODIZATION CONSIDERED .....	18
1.5	CURRENCY CONSIDERED .....	18
1.6	VOLUME UNITS CONSIDERED .....	19
1.7	STAKEHOLDERS .....	19
<b>2</b>	<b>RESEARCH METHODOLOGY.....</b>	<b>20</b>
2.1	RESEARCH DATA .....	20
2.1.1	SECONDARY DATA.....	21
2.1.1.1	Key data from secondary sources .....	21
2.1.2	PRIMARY DATA.....	21
2.1.2.1	Key data from primary sources .....	22
2.1.2.2	Breakdown of primaries.....	22
2.1.2.3	Key primary insights .....	23
2.2	MARKET SIZE ESTIMATION .....	23
2.2.1	APPROACH ONE: TOP-DOWN (DEMAND SIZE).....	24
2.2.2	APPROACH TWO: SUPPLY SIZE.....	25
2.3	DATA TRIANGULATION .....	26
2.4	ASSUMPTIONS FOR STUDY .....	27
2.5	LIMITATIONS AND RISK ASSESSMENT .....	28
<b>3</b>	<b>EXECUTIVE SUMMARY.....</b>	<b>29</b>
<b>4</b>	<b>PREMIUM INSIGHTS .....</b>	<b>34</b>
4.1	ATTRACTIVE OPPORTUNITIES IN INDIAN CITRUS FRUIT JUICES MARKET .....	34
4.2	CITRUS FRUIT JUICES MARKET, BY TYPE AND FRUIT TYPE.....	35
4.3	CITRUS FRUIT JUICES MARKET, BY TYPE .....	35
4.4	CITRUS FRUIT JUICES MARKET, BY FRUIT TYPE .....	36
4.5	CITRUS FRUIT JUICES MARKET, BY PACK SIZE .....	36
4.6	CITRUS FRUIT JUICES MARKET, BY PACK TYPE.....	37
4.7	CITRUS FRUIT JUICES MARKET, BY DISTRIBUTION CHANNEL.....	37

<b>5</b>	<b>MARKET OVERVIEW</b> .....	<b>38</b>
5.1	INTRODUCTION .....	38
5.2	MARKET DYNAMICS.....	39
5.2.1	DRIVERS.....	39
5.2.1.1	Increasing health awareness about benefits of citrus fruit juices .....	39
5.2.1.2	Modern retail stores promoting citrus fruit juice products .....	39
5.2.1.3	Steady decline in rural-urban consumption gap.....	40
5.2.2	RESTRAINTS.....	40
5.2.2.1	Bitterness of citrus fruit juices impacting consumer acceptability .....	40
5.2.2.2	Citrus allergy and other side-effects .....	41
5.2.2.3	Preference for homemade fresh juices over packaged fruit juices.....	41
5.2.3	OPPORTUNITIES.....	41
5.2.3.1	Consumers shifting from soft drinks to citrus fruit juices .....	41
5.2.3.2	Wider availability of products and their long shelf life .....	42
5.2.3.3	Recyclable and environmentally friendly packaging options.....	42
5.2.4	CHALLENGES .....	42
5.2.4.1	Presence of unorganized players making market highly competitive .....	42
5.2.4.2	Stringent regulatory labeling rules on packaged fruit juices .....	43
5.2.4.3	Diseases and seasonal changes affecting cultivation.....	43
<b>6</b>	<b>INDUSTRY TRENDS</b> .....	<b>44</b>
6.1	INTRODUCTION .....	44
6.2	VALUE CHAIN .....	44
6.2.1	RESEARCH AND PRODUCT DEVELOPMENT.....	44
6.2.2	RAW MATERIAL SOURCING.....	44
6.2.3	PRODUCTION AND PROCESSING .....	45
6.2.4	PACKAGING AND STORAGE .....	45
6.2.5	DISTRIBUTION.....	45
6.2.6	MARKETING AND SALES.....	45
6.3	MARKET MAPPING AND ECOSYSTEM OF CITRUS FRUIT JUICES .....	46
6.3.1	DEMAND SIDE.....	46
6.3.2	SUPPLY SIDE.....	46
6.4	PORTER'S FIVE FORCES ANALYSIS .....	48
6.4.1	DEGREE OF COMPETITION .....	49
6.4.2	BARGAINING POWER OF SUPPLIERS .....	49
6.4.3	BARGAINING POWER OF BUYERS .....	49
6.4.4	THREAT OF SUBSTITUTES.....	50
6.4.5	THREAT OF NEW ENTRANTS .....	50

6.5	TARIFFS AND OVERVIEW OF IMPORT PROCEDURES .....	50
6.5.1	IMPORT TARIFF .....	50
6.5.2	FOOD AND BEVERAGE LEGISLATION AND REGULATIONS .....	50
6.5.2.1	Import requirements/restrictions, customs procedures, and documentation.....	50
6.5.2.2	Food safety and other food certification requirements .....	52
6.5.2.3	Labeling requirements.....	52
6.5.3	INDIA AND FOREIGN TRADE.....	54
6.5.3.1	Key trade agreements, present and future .....	54
6.6	LOGISTICAL SERVICES AND TRANSPORTATION INFRASTRUCTURE .....	54
6.6.1	SHIPPING .....	54
6.6.2	AIR FREIGHT.....	54
6.6.3	RAIL FREIGHT.....	55
6.6.4	ROAD FREIGHT .....	55
6.7	DISTRIBUTION .....	55
6.8	BUSINESS ENVIRONMENT .....	57
6.9	TRADE DATA: FRUIT JUICES .....	57
6.9.1	IMPORT DATA: LIST OF SUPPLYING MARKETS FOR PRODUCTS IMPORTED BY INDIA.....	57
6.10	PER CAPITA SOFT DRINKS CONSUMPTION IN INDIA.....	60
6.11	CASE STUDIES .....	61
7	CITRUS FRUIT JUICES MARKET, BY TYPE .....	62
7.1	INTRODUCTION .....	63
7.2	RECONSTITUTED FRUIT JUICES .....	64
7.2.1	COST-EFFECTIVENESS AND EASY AVAILABILITY.....	64
7.2.2	FRUIT DRINKS.....	64
7.2.3	NECTARS .....	64
7.3	100% FRUIT JUICES (NFC) .....	65
7.3.1	RISING DEMAND FROM HEALTH-CONSCIOUS CONSUMERS.....	65
8	CITRUS FRUIT JUICES MARKET, BY FRUIT TYPE.....	66
8.1	INTRODUCTION .....	67
8.2	ORANGE.....	69
8.2.1	HEALTH BENEFITS ASSOCIATED WITH ORANGE JUICE.....	69
8.3	LIME/LEMON .....	70
8.3.1	HEALTH BENEFITS OF LEMON DRINK DRIVING SALES.....	70
8.4	GRAPES .....	71
8.4.1	RICH TASTE AND FLAVOR COUPLED WITH HEALTH BENEFITS .....	71
8.5	MIXES AND OTHERS .....	72
8.5.1	MULTI-FUNCTIONALITY OF MIXED CITRUS FRUIT JUICES CONTRIBUTING TO THEIR HIGH DEMAND .....	72

<b>9</b>	<b>CITRUS FRUIT JUICES MARKET, BY PACK SIZE.....</b>	<b>73</b>
9.1	INTRODUCTION .....	74
9.2	0-200 ML.....	75
9.2.1	EASE OF PORTABILITY AND AFFORDABLE COSTS.....	75
9.3	201-500 ML .....	76
9.3.1	STRONG DEMAND FROM HEALTH-CONSCIOUS CONSUMERS FOR CONSUMPTION OF CITRUS FRUIT JUICES IN LARGER QUANTITIES.....	76
9.4	501-1000 ML .....	76
9.4.1	EXTENDED SHELF LIFE, COST EFFICIENCY, AND RISE IN TREND OF MONTHLY SHOPPING .....	76
9.5	ABOVE 1000 ML.....	76
9.5.1	INCREASING TREND OF ADOPTING CITRUS FRUIT JUICES AS PART OF REGULAR DIET PROVIDING SIGNIFICANT BUSINESS OPPORTUNITIES .....	76
<b>10</b>	<b>CITRUS FRUIT JUICES MARKET, BY PACK TYPE .....</b>	<b>77</b>
10.1	INTRODUCTION .....	78
10.2	BOTTLE.....	79
10.2.1	RECYCLABLE PROPERTIES COUPLED WITH EASE OF TRANSPORTATION .....	79
10.3	ASEPTIC CARTON (TETRA PAK) .....	80
10.3.1	LOWER COSTS CONTRIBUTING TO MARKET GROWTH.....	80
10.4	GLASS BOTTLES .....	80
10.4.1	AESTHETIC AND RECYCLABLE PROPERTIES OF GLASS.....	80
10.5	CANS .....	80
10.5.1	DURABILITY AND GOOD BARRIER PROPERTIES OF CANS.....	80
10.6	STAND-UP POUCHES .....	81
10.6.1	INNOVATIVE AND COST-EFFICIENT PACKAGING SOLUTION .....	81
<b>11</b>	<b>CITRUS FRUIT JUICES MARKET, BY DISTRIBUTION CHANNEL .....</b>	<b>82</b>
11.1	INTRODUCTION .....	83
11.2	CONVENIENCE STORES .....	84
11.2.1	STRONG GEOGRAPHICAL AND DISTRIBUTION NETWORK ACROSS RURAL AND URBAN AREAS .....	84
11.3	HYPERMARKETS AND SUPERMARKETS .....	85
11.3.1	HABITUAL PURCHASE, ALLURING SHELF DISPLAYS, AND DISCOUNTED PRICE OFFERS ON PRODUCTS .....	85
11.4	HORECA.....	85
11.4.1	BETTER BRAND VISIBILITY .....	85
11.5	E-COMMERCE.....	85
11.5.1	RISING TREND OF ONLINE SHOPPING FOR FOOD AND BEVERAGES .....	85
11.6	SPECIALTY STORES .....	86

<b>12</b>	<b>COMPETITIVE LANDSCAPE .....</b>	<b>87</b>
12.1	OVERVIEW.....	87
12.2	MARKET SHARE ANALYSIS, 2021 .....	87
12.3	HISTORICAL REVENUE ANALYSIS OF KEY PLAYERS .....	88
12.4	COMPANY EVALUATION QUADRANT .....	89
12.4.1	STARS.....	89
12.4.2	PERVASIVE PLAYERS .....	89
12.4.3	EMERGING LEADERS.....	90
12.4.4	PARTICIPANTS .....	90
12.4.5	CITRUS FRUIT JUICES MARKET: PRODUCT FOOTPRINT .....	91
12.5	COMPETITIVE SCENARIO .....	96
12.5.1	NEW PRODUCT LAUNCHES .....	96
12.5.2	DEALS.....	96
12.5.3	OTHERS .....	97
<b>13</b>	<b>COMPANY PROFILES.....</b>	<b>98</b>
13.1	KEY PLAYERS.....	98
13.1.1	PEPSICO.....	98
13.1.1.1	Business overview .....	98
13.1.1.2	Products/Services/Solutions offered.....	99
13.1.1.3	Recent developments .....	100
13.1.1.4	MnM view.....	100
13.1.1.4.1	Key strengths/Right to win .....	100
13.1.1.4.2	Strategic choices made.....	100
13.1.1.4.3	Weaknesses and competitive threats.....	101
13.1.2	DABUR INDIA LIMITED.....	102
13.1.2.1	Business overview .....	102
13.1.2.2	Products/Services/Solutions offered.....	104
13.1.2.3	Recent developments .....	104
13.1.2.4	MnM view.....	105
13.1.2.4.1	Key strengths/Right to win .....	105
13.1.2.4.2	Strategic choices made.....	105
13.1.2.4.3	Weaknesses and competitive threats.....	105
13.1.3	ITC LIMITED.....	106
13.1.3.1	Business overview .....	106
13.1.3.2	Products/Services/Solutions offered.....	107
13.1.3.3	Recent developments .....	108
13.1.3.4	MnM view.....	108
13.1.3.4.1	Key strengths/Right to win .....	109
13.1.3.4.2	Strategic choices made.....	109
13.1.3.4.3	Weaknesses and competitive threats.....	109

13.1.4	HECTOR BEVERAGES PRIVATE LIMITED .....	110
13.1.4.1	Business overview .....	110
13.1.4.2	Products/Services/Solutions offered.....	110
13.1.4.3	Recent developments .....	111
13.1.4.4	MnM view.....	111
13.1.4.4.1	Key strengths/Right to win .....	111
13.1.4.4.2	Strategic choices made.....	112
13.1.4.4.3	Weaknesses and competitive threats .....	112
13.1.5	PATANJALI AYURVED .....	113
13.1.5.1	Business overview .....	113
13.1.5.2	Products/Services/Solutions offered.....	113
13.1.5.3	Recent developments .....	114
13.1.5.4	MnM view.....	114
13.1.5.4.1	Key strengths/Right to win .....	114
13.1.5.4.2	Strategic choices made.....	114
13.1.5.4.3	Weaknesses and competitive threats .....	114
13.1.6	THE COCA-COLA COMPANY .....	115
13.1.6.1	Business overview .....	115
13.1.6.2	Products/Services/Solutions offered.....	116
13.1.6.3	Recent developments .....	116
13.1.6.4	MnM view.....	117
13.1.7	SMOODIES .....	118
13.1.7.1	Business overview .....	118
13.1.7.2	Products/Services/Solutions offered.....	118
13.1.7.3	Recent developments .....	119
13.1.7.4	MnM view.....	119
13.1.8	DEL MONTE FOODS, INC.....	120
13.1.8.1	Business overview .....	120
13.1.8.2	Products/Services/Solutions offered.....	120
13.1.8.3	Recent developments .....	120
13.1.8.4	MnM view.....	121
13.1.9	RUS ORGANIC.....	122
13.1.9.1	Business overview .....	122
13.1.9.2	Products/Services/Solutions offered.....	122
13.1.9.3	Recent developments .....	122
13.1.9.4	MnM view.....	123
13.1.10	RAKYAN BEVERAGES.....	124
13.1.10.1	Business overview .....	124
13.1.10.2	Products/Services/Solutions offered.....	124
13.1.10.3	Recent developments .....	125
13.1.10.4	MnM view.....	125



13.2	<b>OTHER PLAYERS .....</b>	<b>126</b>
13.2.1	<b>STORIA FOODS.....</b>	<b>126</b>
13.2.1.1	Business overview .....	126
13.2.1.2	Products/Services/Solutions offered.....	126
13.2.1.3	Recent developments .....	127
13.2.1.4	MnM view.....	127
13.2.2	<b>SPOORTHY ORGANIC FARMERS.....</b>	<b>128</b>
13.2.2.1	Business overview .....	128
13.2.2.2	Products/Services/Solutions offered.....	128
13.2.2.3	Recent developments .....	128
13.2.2.4	MnM view.....	129
13.2.3	<b>AXIOM AYURVEDA PVT. LTD.....</b>	<b>130</b>
13.2.3.1	Business overview .....	130
13.2.3.2	Products/Services/Solutions offered.....	130
13.2.3.3	Recent developments .....	130
13.2.3.4	MnM view.....	131
13.2.4	<b>DOLE PLC.....</b>	<b>132</b>
13.2.4.1	Business overview .....	132
13.2.4.2	Products/Services/Solutions offered.....	132
13.2.4.3	Recent developments .....	132
13.2.4.4	MnM view.....	133
13.2.5	<b>HEALTHYSIP .....</b>	<b>134</b>
13.2.5.1	Business overview .....	134
13.2.5.2	Products/Services/Solutions offered.....	134
13.2.5.3	Recent developments .....	134
13.2.5.4	MnM view.....	135
<b>14</b>	<b>APPENDIX.....</b>	<b>136</b>
14.1	<b>DISCUSSION GUIDE .....</b>	<b>136</b>
14.2	<b>KNOWLEDGE STORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL.....</b>	<b>141</b>
14.3	<b>RELATED REPORTS .....</b>	<b>143</b>
14.1	<b>AUTHOR DETAILS.....</b>	<b>144</b>

## LIST OF TABLES

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<b>TABLE 1</b>	USD EXCHANGE RATES CONSIDERED, 2018–2021	19
<b>TABLE 2</b>	CITRUS FRUIT JUICES MARKET SNAPSHOT, 2022 VS. 2027	29
<b>TABLE 3</b>	CITRUS FRUIT JUICES: SUPPLY CHAIN (ECOSYSTEM)	47
<b>TABLE 4</b>	CITRUS FRUIT JUICES MARKET: PORTER'S FIVE FORCES ANALYSIS	49
<b>TABLE 5</b>	BRAZIL: TARIFF DETAILS SPECIFIC TO HS CODE 22029020	50
<b>TABLE 6</b>	LIST OF DOCUMENTS TO BE PRESENT TO CUSTOMS TO RELEASE ALL IMPORTED AGRI-FOOD PRODUCTS, INCLUSIVE OF FRUIT JUICE	51
<b>TABLE 7</b>	TRADE AGREEMENTS CONCLUDED BY INDIA	54
<b>TABLE 8</b>	TOP 10 IMPORTERS FOR HS CODE: 2009 (FRUIT JUICES, INCL. GRAPE MUST, AND VEGETABLE JUICES, UNFERMENTED, NOT CONTAINING ADDED SPIRIT) BY COUNTRY, 2017-2021, VOLUME (TON)	57
<b>TABLE 9</b>	LIST OF FRUIT JUICES IMPORTED BY INDIA, 2016-2020, VOLUME (TON)	58
<b>TABLE 10</b>	KEY IMPORTERS OF HS CODE 200911 (JUICES, ORANGE, FROZEN, UNFERMENTED [NOT CONTAINING ADDED SPIRIT] WHETHER OR NOT CONTAINING ADDED SUGAR OR OTHER SWEETENING MATTER), FOR INDIA, 2019-2021	59
<b>TABLE 11</b>	KEY IMPORTERS OF HS CODE 200912 (JUICES, ORANGE, NOT FROZEN, OF A BRX VALUE, NOT EXCEEDING 20, UNFERMENTED, NOT CONTAINING ADDED SPIRIT, WHETHER OR NOT CONTAINING ADDED SUGAR OR OTHER SWEETENING MATTER) FOR INDIA, 2019-2021	59
<b>TABLE 12</b>	KEY IMPORTERS OF HS CODE 200919 (JUICES, ORANGE, NOT FROZEN, OF A BRX VALUE EXCEEDING 20, UNFERMENTED, NOT CONTAINING ADDED SPIRIT, WHETHER OR NOT CONTAINING ADDED SUGAR OR OTHER SWEETENING MATTER) FOR INDIA, 2019-2021	60
<b>TABLE 13</b>	PER CAPITA SOFT DRINKS CONSUMPTION, BY PRODUCT TYPE, 2020 (LITERS)	60
<b>TABLE 14</b>	ITC LIMITED: STRATEGIC PARTNERSHIPS	61
<b>TABLE 15</b>	DABUR INDIA LIMITED: LOW-CALORIE PRODUCTS	61
<b>TABLE 16</b>	CITRUS FRUIT JUICES MARKET, BY TYPE, 2020–2027 (USD MILLION)	63
<b>TABLE 17</b>	CITRUS FRUIT JUICES MARKET, BY TYPE, 2020–2027 (MILLION LITERS)	64
<b>TABLE 18</b>	INDIA: CITRUS FRUIT PRODUCTION, BY FRUIT TYPE, 2019–2022 (KT)	67
<b>TABLE 19</b>	CITRUS FRUIT JUICES MARKET, BY FRUIT TYPE, 2020–2027 (USD MILLION)	68
<b>TABLE 20</b>	CITRUS FRUIT JUICES MARKET, BY FRUIT TYPE, 2020–2027 (MILLION LITERS)	68
<b>TABLE 21</b>	INDIA: TOP TEN PRODUCERS OF MANDARIN (M.ORANG, KINNOW, ORANGE), BY STATE, 2021–2022 (KT)	69
<b>TABLE 22</b>	INDIA: TOP TEN PRODUCERS OF SWEET ORANGE (MALTA, MOSAMBI), BY STATE, 2021–2022 (KT)	70
<b>TABLE 23</b>	INDIA: TOP TEN PRODUCERS OF LIME/LEMON, BY STATE, 2021–2022 (KT)	71
<b>TABLE 24</b>	INDIA: TOP TEN PRODUCERS OF GRAPES, BY STATE, 2021–2022 (KT)	72
<b>TABLE 25</b>	CITRUS FRUIT JUICES MARKET, BY PACK SIZE, 2020–2027 (USD MILLION)	75
<b>TABLE 26</b>	CITRUS FRUIT JUICES MARKET, BY PACK SIZE, 2020–2027 (MILLION LITERS)	75
<b>TABLE 27</b>	CITRUS FRUIT JUICES MARKET, BY PACK TYPE, 2020–2027 (USD MILLION)	79
<b>TABLE 28</b>	CITRUS FRUIT JUICES MARKET, BY PACK TYPE, 2020–2027 (MILLION LITERS)	79
<b>TABLE 29</b>	CITRUS FRUIT JUICE MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)	84
<b>TABLE 30</b>	CITRUS FRUIT JUICE MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (MILLION LITERS)	84

<b>TABLE 31</b>	CITRUS FRUIT JUICES MARKET SHARE ANALYSIS, 2021	88
<b>TABLE 32</b>	COMPANY FOOTPRINT, BY TYPE	91
<b>TABLE 33</b>	COMPANY FOOTPRINT, BY FRUIT TYPE	92
<b>TABLE 34</b>	COMPANY FOOTPRINT, BY PACK TYPE	93
<b>TABLE 35</b>	COMPANY FOOTPRINT, BY PACK SIZE	94
<b>TABLE 36</b>	OVERALL COMPANY FOOTPRINT	95
<b>TABLE 37</b>	CITRUS FRUIT JUICES MARKET: NEW PRODUCT LAUNCHES, 2021	96
<b>TABLE 38</b>	CITRUS FRUIT JUICES MARKET: DEALS, 2020-2022	96
<b>TABLE 39</b>	CITRUS FRUIT JUICES MARKET: OTHERS, 2019-2022	97
<b>TABLE 40</b>	PEPSICO: BUSINESS OVERVIEW	98
<b>TABLE 41</b>	PEPSICO: PRODUCTS/SOLUTIONS/SERVICES OFFERED	99
<b>TABLE 42</b>	PEPSICO: OTHERS	100
<b>TABLE 43</b>	DABUR INDIA LIMITED: BUSINESS OVERVIEW	102
<b>TABLE 44</b>	DABUR INDIA LIMITED: PRODUCTS/SOLUTIONS/SERVICES OFFERED	104
<b>TABLE 45</b>	DABUR INDIA LIMITED: DEALS	104
<b>TABLE 46</b>	DABUR INDIA LIMITED: OTHERS	105
<b>TABLE 47</b>	ITC LIMITED: BUSINESS OVERVIEW	106
<b>TABLE 48</b>	ITC LIMITED: PRODUCTS/SOLUTIONS/SERVICES OFFERED	107
<b>TABLE 49</b>	ITC LIMITED: DEALS	108
<b>TABLE 50</b>	ITC LIMITED: NEW PRODUCT LAUNCHES	108
<b>TABLE 51</b>	HECTOR BEVERAGES PRIVATE LIMITED: BUSINESS OVERVIEW	110
<b>TABLE 52</b>	HECTOR BEVERAGES PRIVATE LIMITED.: PRODUCTS/SOLUTIONS/ SERVICES OFFERED	110
<b>TABLE 53</b>	HECTOR BEVERAGES PRIVATE LIMITED: DEALS	111
<b>TABLE 54</b>	HECTOR BEVERAGES PRIVATE LIMITED: OTHERS	111
<b>TABLE 55</b>	PATANJALI AYURVED: BUSINESS OVERVIEW	113
<b>TABLE 56</b>	PATANJALI AYURVED: PRODUCTS/SOLUTIONS/SERVICES OFFERED	113
<b>TABLE 57</b>	PATANJALI AYURVED: OTHERS	114
<b>TABLE 58</b>	THE COCA-COLA COMPANY: BUSINESS OVERVIEW	115
<b>TABLE 59</b>	THE COCA-COLA COMPANY: PRODUCTS/SOLUTIONS/SERVICES OFFERED	116
<b>TABLE 60</b>	THE COCA-COLA COMPANY: OTHERS	116
<b>TABLE 61</b>	SMOODIES: BUSINESS OVERVIEW	118
<b>TABLE 62</b>	SMOODIES: PRODUCTS/SOLUTIONS/SERVICES OFFERED	118
<b>TABLE 63</b>	SMOODIES: OTHERS	119
<b>TABLE 64</b>	DEL MONTE FOODS, INC: BUSINESS OVERVIEW	120
<b>TABLE 65</b>	DEL MONTE FOODS, INC: PRODUCTS/SOLUTIONS/SERVICES OFFERED	120
<b>TABLE 66</b>	RUS ORGANIC: BUSINESS OVERVIEW	122
<b>TABLE 67</b>	RUS ORGANIC: PRODUCTS/SOLUTIONS/SERVICES OFFERED	122
<b>TABLE 68</b>	RAKYAN BEVERAGES: BUSINESS OVERVIEW	124
<b>TABLE 69</b>	RAKYAN BEVERAGES: PRODUCTS/SOLUTIONS/SERVICES OFFERED	124
<b>TABLE 70</b>	RAKYAN BEVERAGES: OTHERS	125
<b>TABLE 71</b>	STORIA FOODS: BUSINESS OVERVIEW	126
<b>TABLE 72</b>	STORIA FOODS: PRODUCTS/SOLUTIONS/SERVICES OFFERED	126
<b>TABLE 73</b>	STORIA FOODS: OTHERS	127

<b>TABLE 74</b>	SPOORTHY ORGANIC FARMERS: BUSINESS OVERVIEW	128
<b>TABLE 75</b>	SPOORTHY ORGANIC FARMERS: PRODUCTS/SOLUTIONS/SERVICES OFFERED	128
<b>TABLE 76</b>	AXIOM AYURVEDA PVT. LTD.: BUSINESS OVERVIEW	130
<b>TABLE 77</b>	AXIOM AYURVEDA PVT. LTD.: PRODUCTS/SOLUTIONS/SERVICES OFFERED	130
<b>TABLE 78</b>	DOLE PLC: BUSINESS OVERVIEW	132
<b>TABLE 79</b>	DOLE PLC: PRODUCTS/SOLUTIONS/SERVICES OFFERED	132
<b>TABLE 80</b>	HEALTHYSIP: BUSINESS OVERVIEW	134
<b>TABLE 81</b>	HEALTHYSIP: PRODUCTS/SOLUTIONS/SERVICES OFFERED	134

## LIST OF FIGURES

---

<b>FIGURE 1</b>	MARKET SEGMENTATION	17
<b>FIGURE 2</b>	CITRUS FRUIT JUICES MARKET: RESEARCH DESIGN	20
<b>FIGURE 3</b>	MARKET SIZE ESTIMATION	24
<b>FIGURE 4</b>	MARKET SIZE ESTIMATION	25
<b>FIGURE 5</b>	DATA TRIANGULATION METHODOLOGY	26
<b>FIGURE 6</b>	CITRUS FRUIT JUICES MARKET, BY TYPE, 2022 VS. 2027 (MILLION LITERS)	30
<b>FIGURE 7</b>	CITRUS FRUIT JUICES MARKET, BY FRUIT TYPE, 2022 VS. 2027	31
<b>FIGURE 8</b>	CITRUS FRUIT JUICES MARKET, BY PACK SIZE, 2022 VS. 2027	31
<b>FIGURE 9</b>	CITRUS FRUIT JUICES MARKET, BY DISTRIBUTION CHANNEL, 2022 VS. 2027	32
<b>FIGURE 10</b>	CITRUS FRUIT JUICES MARKET, BY PACK TYPE, 2022 VS. 2027	33
<b>FIGURE 11</b>	INCREASING HEALTH AWARENESS AMONG CONSUMERS PROPELLING CITRUS FRUIT JUICES MARKET GROWTH	34
<b>FIGURE 12</b>	FRUIT DRINKS AND ORANGE SEGMENTS ACCOUNTED FOR SIGNIFICANT SHARE IN INDIAN CITRUS FRUIT JUICES MARKET IN 2021	35
<b>FIGURE 13</b>	FRUIT DRINKS SEGMENT EXPECTED TO DOMINATE MARKET BY 2027	35
<b>FIGURE 14</b>	ORANGE SEGMENT EXPECTED TO DOMINATE MARKET BY 2027	36
<b>FIGURE 15</b>	0-200 ML SEGMENT EXPECTED TO DOMINATE MARKET BY 2027	36
<b>FIGURE 16</b>	BOTTLES SEGMENT EXPECTED TO DOMINATE MARKET BY 2027	37
<b>FIGURE 17</b>	CONVENIENCE STORES SEGMENT EXPECTED TO DOMINATE MARKET BY 2027	37
<b>FIGURE 18</b>	CITRUS FRUIT JUICES MARKET DYNAMICS	39
<b>FIGURE 19</b>	VALUE CHAIN ANALYSIS OF CITRUS FRUIT JUICES MARKET	45
<b>FIGURE 20</b>	CITRUS FRUIT JUICES: MARKET MAP	46
<b>FIGURE 21</b>	CITRUS FRUIT JUICES: ECOSYSTEM MAPPING	47
<b>FIGURE 22</b>	INDIAN DISTRIBUTION CHANNEL	56
<b>FIGURE 23</b>	CITRUS FRUIT JUICES MARKET, BY TYPE, 2022 VS. 2027 (VALUE)	63
<b>FIGURE 24</b>	CITRUS FRUIT JUICES MARKET, BY FRUIT TYPE, 2022 VS. 2027 (VALUE)	68
<b>FIGURE 25</b>	CITRUS FRUIT JUICES MARKET, BY PACK SIZE, 2022 VS. 2027 (VALUE)	74
<b>FIGURE 26</b>	CITRUS FRUIT JUICES MARKET, BY PACK TYPE, 2022 VS. 2027 (VALUE)	78
<b>FIGURE 27</b>	CITRUS FRUIT JUICE MARKET (VALUE), BY DISTRIBUTION CHANNEL, 2022 VS. 2027	83
<b>FIGURE 28</b>	TOTAL REVENUE ANALYSIS OF KEY PLAYERS, 2017–2021 (USD BILLION)	88
<b>FIGURE 29</b>	CITRUS FRUIT JUICES MARKET: COMPANY EVALUATION QUADRANT, 2021	90
<b>FIGURE 30</b>	PEPSICO: COMPANY SNAPSHOT	99
<b>FIGURE 31</b>	DABUR INDIA LIMITED: COMPANY SNAPSHOT	103
<b>FIGURE 32</b>	ITC LIMITED: COMPANY SNAPSHOT	107
<b>FIGURE 33</b>	THE COCA-COLA COMPANY: COMPANY SNAPSHOT	116

## LIST OF ABBREVIATIONS

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ABBREVIATION	FULL FORM
APEDA	Agricultural and Processed Food Products Export Development Authority
BIS	The Bureau of Indian Standards
CAGR	Compounded Annual Growth Rate
CBIC	Central Board of Indirect Taxes and Customs
COVID-19	Coronavirus Disease 2019
DAC	Department of Agriculture and Cooperation
DAHD	The Department of Animal Husbandry and Dairying
DFCs	Dedicated Freight Corridors
FAO	Food and Agriculture Organization
FSSAI	Food Safety and Standards Authority of India
g	Gram
GMP	Good Manufacturing Practices
GOI	The Government of India
HLB	Huanglongbing
HORECA	Hotel/Restaurant/Café
IBA	Indian Beverage Association
IR	Indian Railways
ml	milliliter
NFC	Not From Concentrate
NHAI	National Highways Authority of India
NOC	No-objection Certificate
PET	Polyethylene Terephthalate
PET	Polyethylene
PP	Polypropylene

PVC	Polyvinyl Chloride
SMEs	Subject Matter Experts
US	United States
USD	United States Dollar
WHO	World Health Organization

# 1 INTRODUCTION

---

## 1.1 STUDY OBJECTIVES

### MARKET INTELLIGENCE

- Determining and projecting the size of the Indian citrus fruit juices market with respect to type, fruit type, pack type, pack size, and distribution channel.
- Identifying the attractive opportunities in the market by determining the largest and fastest-growing segments across the country
- Providing detailed information about the key factors influencing the market growth (drivers, restraints, opportunities, and industry-specific challenges)
- Providing the regulatory framework and market entry process related to the citrus fruit juices market
- Analyzing the micromarkets with respect to individual growth trends, prospects, and their contribution to the total market

### COMPETITIVE INTELLIGENCE

- Identifying and profiling the key players in the citrus fruit juices market
- Providing a comparative analysis of market leaders based on the following:
  - Product offerings
  - Business strategies
  - Strengths and weaknesses
  - Key financials
- Understanding the competitive landscape and identifying the major growth strategies adopted by players across the country
- Providing insights on key product innovations and investments in the Indian citrus fruit juices market

## 1.2 MARKET DEFINITION

According to the Food and Agriculture Organization (FAO), fruit juice is defined as “the unfermented but fermentable liquid obtained from the edible part of a sound, appropriately mature and fresh fruit or of fruit maintained in sound condition by suitable means, including post-harvest surface treatments applied in accordance with the applicable provisions of the Codex Alimentarius Commission.

*Some juices may be processed with pips, seeds, and peel, which are not usually incorporated in the juice, but some parts or components of pips, seeds, and peel, which cannot be removed by Good Manufacturing Practices (GMP), will be acceptable.*

*The juice is prepared by suitable processes, which maintain the essential physical, chemical, organoleptical, and nutritional characteristics of the juices of the fruit from which it comes. The juice may be cloudy or clear and may have restored aromatic substances and volatile flavor components, all of which must be obtained by suitable physical means and all of which must be recovered from the same kind of fruit. Pulp and cells obtained by suitable physical means from the same kind of fruit may be added.*



A single juice is obtained from one kind of fruit. A mixed juice is obtained by blending two or more juices or juices and purées, from different kinds of fruit.”

The citrus fruit types considered in the scope of the study include orange, lime/lemon, grape, and mixed fruit that contains a combination of orange, lime/lemon, grape, with other fruits. The types of citrus fruit juices include 100% juice, nectars, and fruit drinks. 100% juice is made not from concentrates and contains 100% pulp. The nectar is a juice made from fruit pulp (24%-99%) or concentrated pulp added with sugar and acid agents. However, fruit drinks contain 0%-24% pulp and need higher water content; the fruits majorly serve as a flavoring.

### 1.3 STUDY SCOPE

**FIGURE 1** MARKET SEGMENTATION



Mixes and Others include Gooseberry (amla) and Other Mixed Fruits.

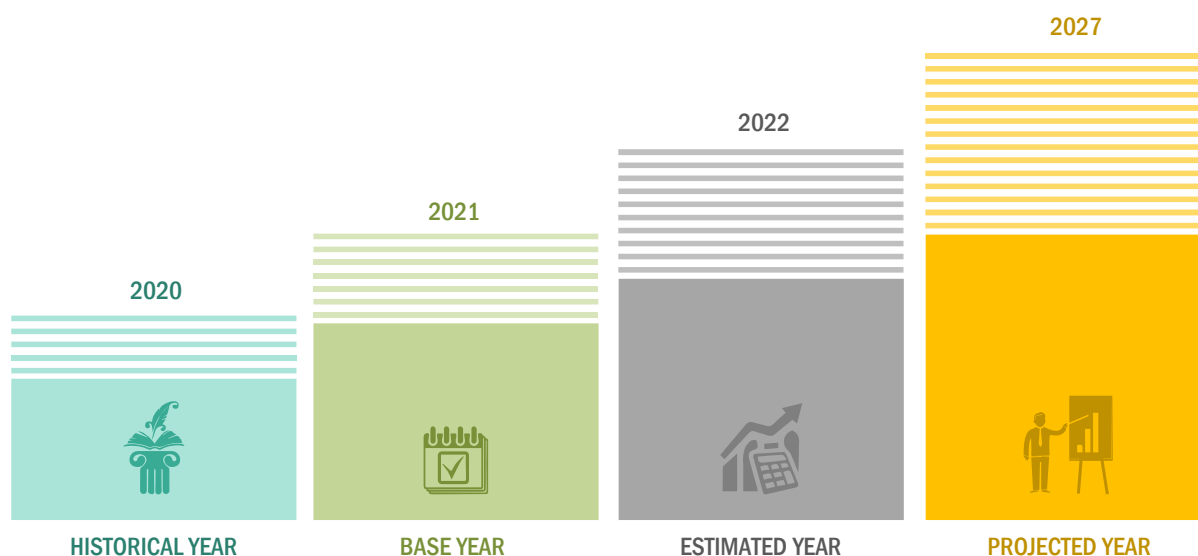
Source: Primary Interviews, Related Research Publications, Government Publications, Company Press Releases, and MarketsandMarkets Analysis

#### 1.3.1 INCLUSIONS AND EXCLUSIONS

SEGMENT	INCLUSION	EXCLUSION
Type	All types of packaged citrus fruit juices that are 100% juice (NFC), fruit drinks, and nectars	<ul style="list-style-type: none"> <li>Citrus flavored carbonated or sparkling drinks</li> <li>Citrus fruit squash/concentrated/syrups/purees</li> <li>All other non-citrus fruit juices/drinks/beverages</li> </ul>
Distribution channel	All types of packaged citrus fruit juice distributed in convenience stores, hypermarkets & supermarkets, HORECA, E-commerce, and specialty stores	<ul style="list-style-type: none"> <li>Un-organized channel</li> <li>Citrus fruit juice available in unpacked format</li> </ul>

Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

## 1.4 PERIODIZATION CONSIDERED



Source: Primary Interviews, Related Research Publications, Government Publications, Company Press Releases, and MarketsandMarkets Analysis

- The financial year considered for most company profiles is 2021. In case the data was unavailable for the base year for specific companies, the data from the previous year was considered.
- The period considered for the study of the competitive landscape ranges from January 2019 to June 2022.
- Wherever required, up to two or three digits have been considered post the decimal point to differentiate between the market sizes of the segments.

## 1.5 CURRENCY CONSIDERED

The currency used to indicate the market size (in terms of value) and company revenues in this report is USD.

- ISO 4217 codes are used to depict currency names; the market size, in terms of value, is represented using “USD.”
- The market has been mainly studied in terms of USD million, with certain values provided in USD billion. The denomination is based on the size of values, enabling uniform accommodation of these values within tables, figures, or any form of study of a particular segment.
- The figures were sourced from their annual reports for companies reporting their revenues in US dollars.
- For companies reporting their revenues in other currencies, the average annual currency conversion rates of the respective years from the US IRS were used for the particular year to convert the value to US dollars. The table below lists the currency exchange rates that were considered:

**TABLE 1** USD EXCHANGE RATES CONSIDERED, 2018–2021

Country (Currency)	2018	2019	2020	2021
India	68.422	70.394	74.102	73.936

Source: IRS

## 1.6 VOLUME UNITS CONSIDERED

- The base unit used in the report to estimate the market size in terms of volume is million liters.
- During the study, the data available in other units, including milliliters, was converted to liters.
- The conversion considered is mentioned below:
  - 1 liter = 1000 milliliter (ml)
  - In terms of volume as well, the denomination is based on the size of the values, enabling uniform accommodation of these values within tables, figures, or any form of study of a particular segment.

## 1.7 STAKEHOLDERS

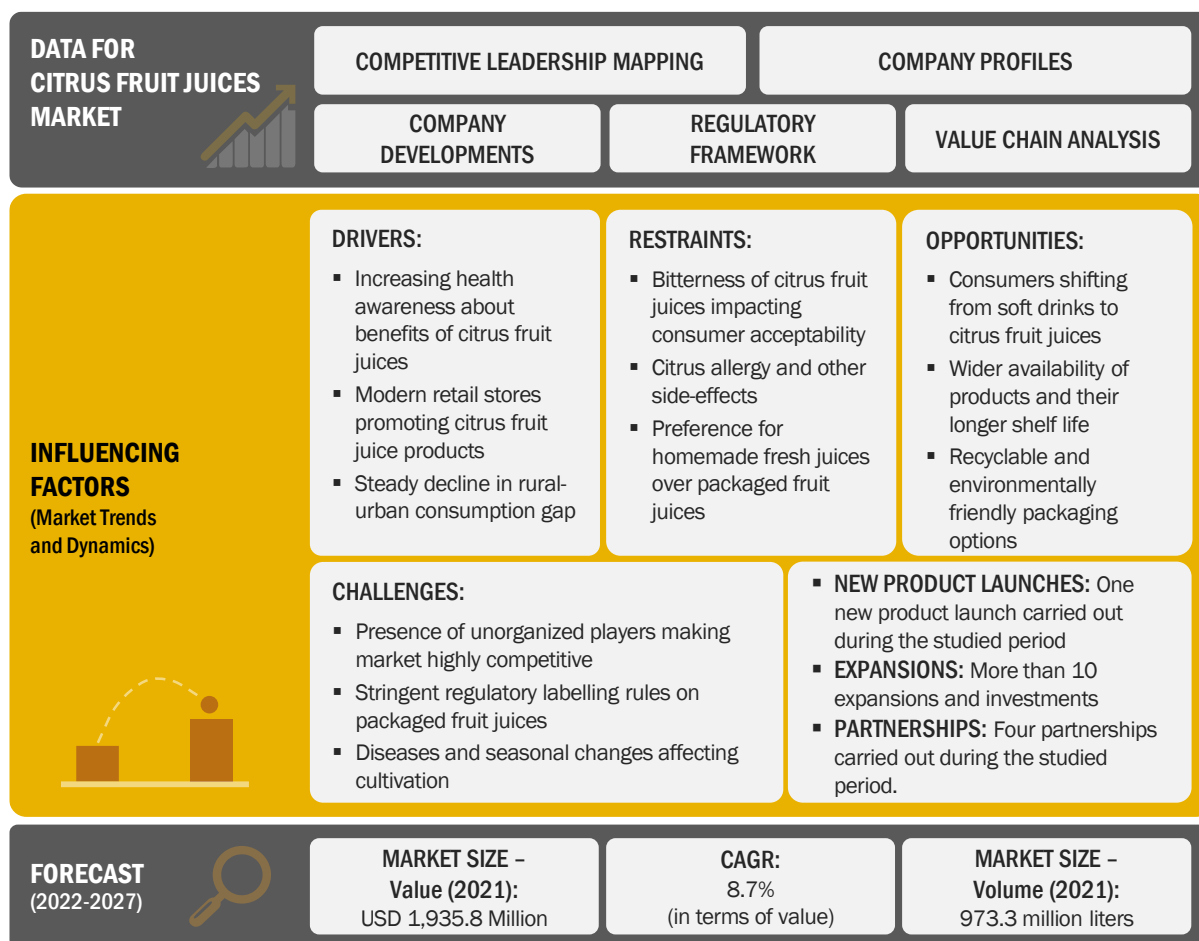
- Raw material suppliers of fruit juice
- Fruit juice and drink manufacturers
- Intermediate stakeholders, including distributors, retailers, associations, regulatory bodies, and others
- Traders of soft drink products
- Government organizations, institutes, and research organizations
- Associations and industry bodies:
  - Food Safety and Standards Authority of India (FSSAI)
  - Indian Beverage Association (IBA)
  - Indian Soft Drinks Manufacturers Association
  - Agricultural & Processed Food Products Export Development Authority (Ministry of Commerce & Industry, Govt. of India)
  - Central Board of Indirect Taxes and Customs (CBIC)
  - Ministry of Health and Family Welfare
  - Ministry of Consumer Affairs, Food, and Public Distribution
  - Ministry of Commerce and Industry
  - Bureau of Indian Standards
  - Ministry of Food Processing Industries, Government of India
  - Department of Commerce, Ministry of Commerce and Industry

## 2 RESEARCH METHODOLOGY

### 2.1 RESEARCH DATA

This research study involved the extensive use of secondary sources—directories and databases, such as Bloomberg Businessweek and Factiva—to identify and collect valuable information for a technical, market-oriented, and commercial study of the citrus fruit juices market. To obtain and verify critical qualitative and quantitative information and assess prospects, in-depth interviews with various primary respondents, such as key industry participants, Subject Matter Experts (SMEs), C-level executives of key market players, and industry consultants, were conducted. The following figure depicts the research design in drafting this report on the citrus fruit juices market.

**FIGURE 2 CITRUS FRUIT JUICES MARKET: RESEARCH DESIGN**



Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

### 2.1.1 SECONDARY DATA

In the secondary research process, various sources, such as the Food and Agriculture Organization (FAO), Food Safety and Standards Authority of India (FSSAI), Indian Beverage Association (IBA), Indian Soft Drinks Manufacturers Association, Agricultural & Processed Food Products Export Development Authority (Ministry of Commerce & Industry, Govt. of India), etc., were referred to, to identify and collect information for this study. The secondary sources also include fruit juice journals, press releases, investor presentations of companies, white papers, certified publications, articles by recognized authors and regulatory bodies, trade directories, and paid databases.

Secondary research was mainly conducted to obtain critical information about the industry's supply chain, the total pool of key players, and market classification & segmentation according to the industry trends to the bottom-most level and geographical markets. It was also used to obtain information about the key developments from a market-oriented perspective.

#### 2.1.1.1 Key data from secondary sources

PARAMETER	SOURCE
Market Size	<ul style="list-style-type: none"> <li>▪ Company financials</li> <li>▪ Company presentations</li> <li>▪ Magazines</li> <li>▪ Journals</li> <li>▪ Press releases</li> <li>▪ Paid databases</li> <li>▪ MarketsandMarkets data repository</li> </ul>
Revenue of Companies	<ul style="list-style-type: none"> <li>▪ Annual reports</li> <li>▪ Company websites</li> <li>▪ Public databases</li> <li>▪ MarketsandMarkets data repository</li> </ul>
Qualitative Information	<ul style="list-style-type: none"> <li>▪ Company websites</li> <li>▪ Annual reports</li> <li>▪ Press releases</li> <li>▪ MarketsandMarkets data repository</li> </ul>

Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

### 2.1.2 PRIMARY DATA

The market comprises several stakeholders in the supply chain, which include fruit juice manufacturers; raw material suppliers of fruit juices; and manufacturers and traders of fruit juices, including orange juice, lime/lemon juice, grape juice, and others. Various primary sources from both the supply and demand sides of the market were interviewed to obtain qualitative and quantitative information. The primary interviewees from the supply side include citrus fruit juice manufacturers. The primary sources from the demand side include distributors, importers, exporters, and end-use sectors.

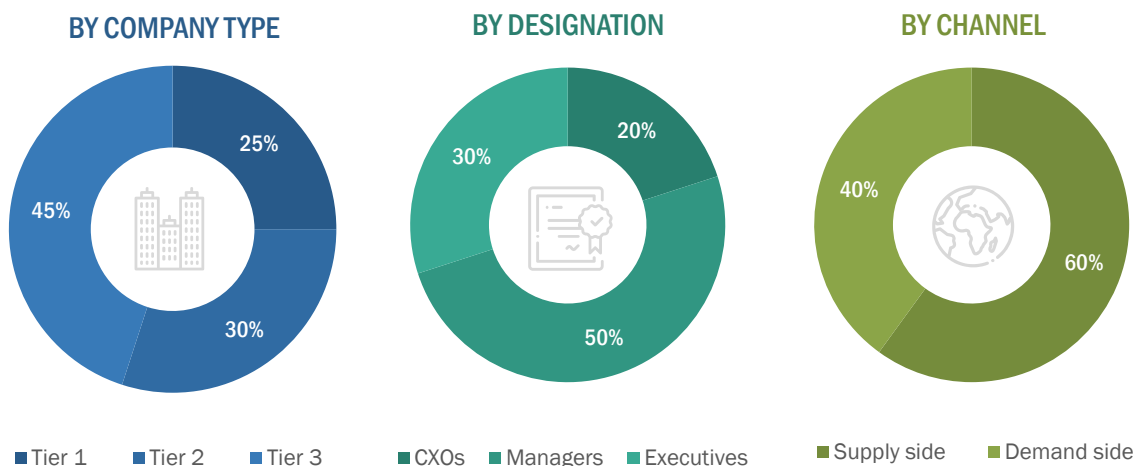
### 2.1.2.1 Key data from primary sources

SEGMENT	MARKET DEFINITION
Geographical Scope	India
Type	The major types of citrus fruit juices market include fruit drinks, 100% fruit juice (NFC), and nectars.
Fruit Type	The major fruit types covered in the study include orange, lime/lemon, grapes, and mixes and others.
Pack Size	The four major pack sizes covered in the study include 0-200 ml, 201-500 ml, 501-1000 ml, and above 1000 ml.
Pack Type	The pack types covered in the study include bottles, aseptic cartons (tetra pak), glass bottles, cans, and stand-up pouches.
Distribution Channel	The major distribution channels covered in the study include convenience stores, hypermarkets and supermarkets, HORECA, e-commerce, and specialty stores.

Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

### 2.1.2.2 Breakdown of primaries

CITRUS FRUIT JUICES MARKET		
Falhari	Rasna Group	HealthySip
Spoorthy Organic Farmers	The Juice Junction	Dabur India Limited
PepsiCo	Rus Organic	ITC Limited



Note 1: Tier 1: Revenue > USD 500 million; Tier 2: USD 100 million < Revenue < USD 500 million; Tier 3: Revenue < USD 100 million

Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

### 2.1.2.3 Key primary insights

The demand for citrus fruit juices has been high because they are mixed with other fruit juices, which increases their applicability. The demand has also been significantly high, owing to the rising number of health-conscious consumers.

– Production Manager,  
Citrus Fruit Juices Manufacturer, India

Convenience stores are the leading distribution channel for citrus fruit juices products because of their widespread presence across all the rural and urban places of India. Convenience stores will continue to be the dominant distribution channel for citrus fruit juice products.

– Director,  
Citrus Fruit Juice Manufacturer, India

In India, the 0-200 ml pack size is highly preferred because consumers are more inclined toward convenience and portability and being able to carry the pack around.

– Manager,  
Fruit Juices Supplier, India



Source: Expert Interviews

After the complete market engineering process (calculations for market statistics, market breakdown, market size estimations & projections, and data triangulation) was done, extensive primary research was conducted to gather information and verify and validate the critical numbers arrived at. Primary research was also conducted to identify the segmentation, key players, competitive landscape, and market dynamics, such as drivers, restraints, opportunities, challenges, and strategies adopted by leading players.

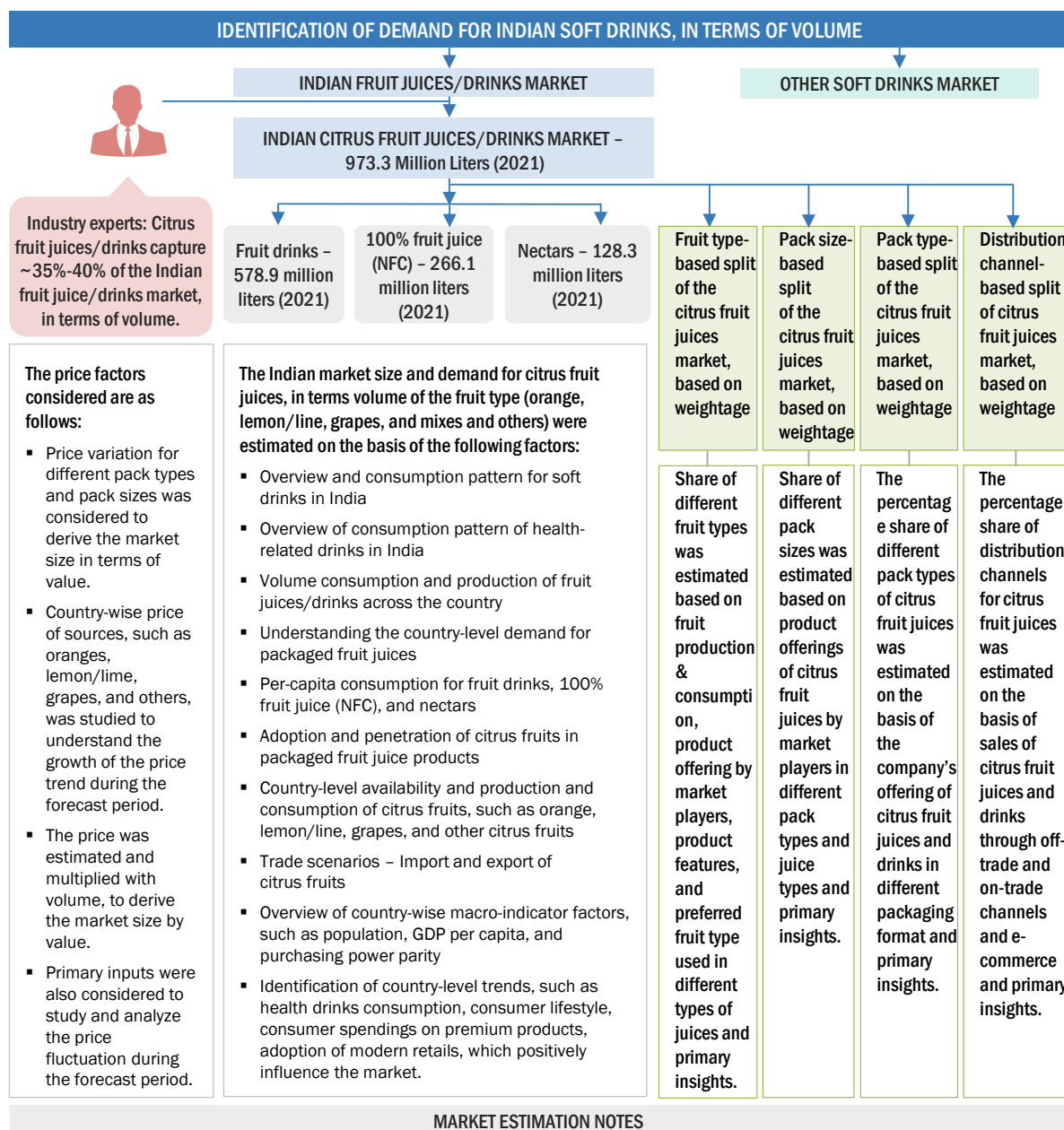
## 2.2 MARKET SIZE ESTIMATION

The demand side and supply side approaches were used to estimate and validate the total size of the citrus fruit juices market. These approaches were also used extensively to determine the size of various subsegments in the market for the base year in terms of value and volume. The research methodology used to estimate the market size includes the following details:

- The key players in the industry and the overall markets were identified through extensive secondary research.
- The revenues of the major players were determined through primary and secondary research, which were used as the basis for market sizing and estimation.
- All percentage shares, splits, and breakdowns were determined using secondary sources and verified through primary sources.
- All macroeconomic and microeconomic factors affecting the growth of the citrus fruit juices market were considered while estimating the market size.
- All possible parameters affecting the market covered in this research study were accounted for, viewed in extensive detail, verified through primary research, and analyzed to obtain final quantitative and qualitative data.

## 2.2.1 APPROACH ONE: TOP-DOWN (DEMAND SIZE)

**FIGURE 3** MARKET SIZE ESTIMATION



**MARKET ESTIMATION NOTES**

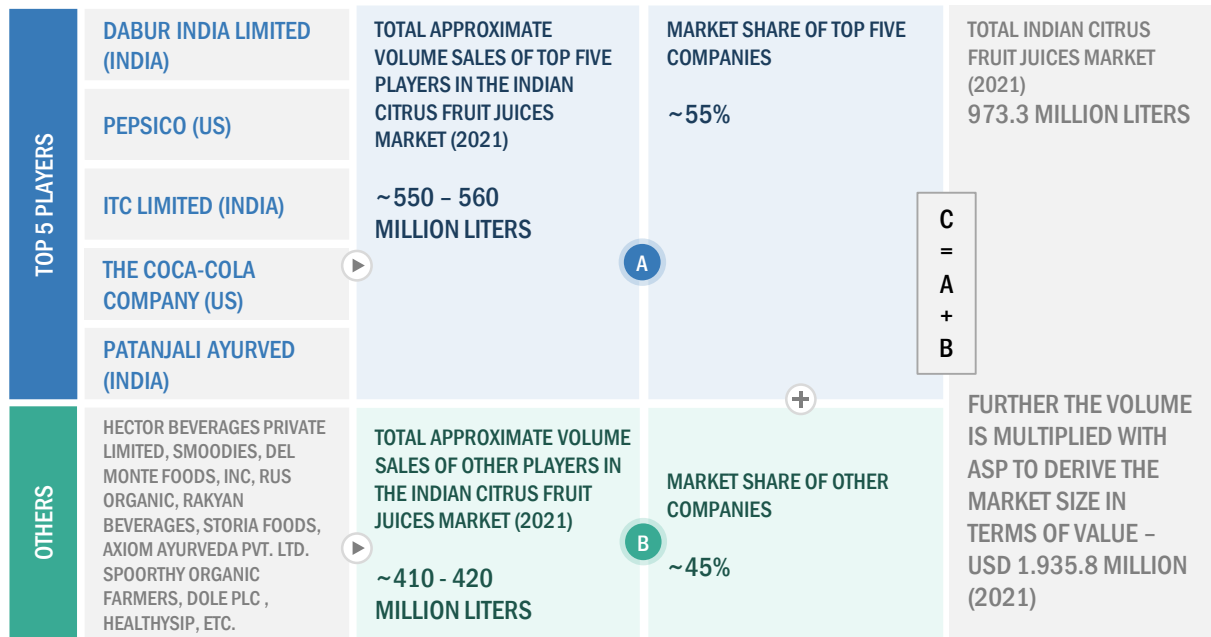
- The market size was estimated on the basis of volume; further global value consumption was derived by using the price factors and authenticated secondary sources.
- Relative factors from the parent and adjacent markets were considered to study the growth pattern. This was used in determining the market CAGR.

Source: MarketsandMarkets Repository, Secondary Research, Expert Interviews, and MarketsandMarkets Analysis



2.2.2 APPROACH TWO: SUPPLY SIZE

**FIGURE 4** MARKET SIZE ESTIMATION

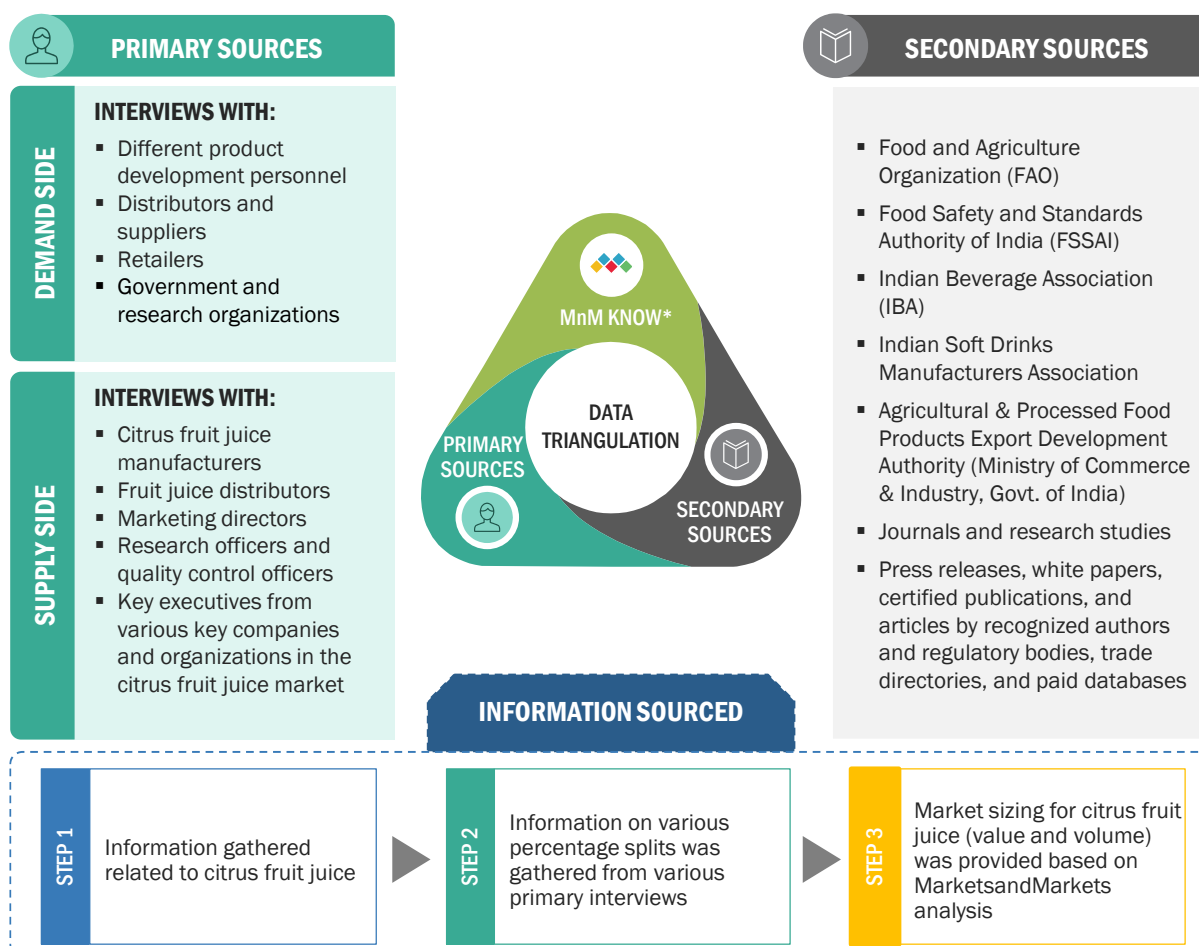


Source: MarketsandMarkets Repository, Secondary Research, Expert Interviews, and MarketsandMarkets Analysis

## 2.3 DATA TRIANGULATION

After arriving at the overall market size from the estimation process explained above, the total market was split into several segments and subsegments. The data triangulation and market breakdown procedures were employed, wherever applicable, to estimate the overall citrus fruit juices market and arrive at the exact statistics for all segments and subsegments. The data was triangulated by studying various factors and trends from the demand and supply sides.

**FIGURE 5 DATA TRIANGULATION METHODOLOGY**



\*MnM KNOW stands for MarketsandMarkets' 'Knowledge Asset Management' framework. It refers to the existing market research knowledge repository of over 5,000 granular markets, our flagship competitive intelligence and market research platform "KS," subject matter experts, and independent consultants. MnM KNOW acts as an independent source that helps us validate information gathered from primary and secondary sources.




Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

## 2.4 ASSUMPTIONS FOR STUDY

PARAMETER	DESCRIPTION
Political Stability	Political situations were assumed to be stable throughout the projection period in the regions covered in the report.
Economy	A positive economic climate was assumed to continue across all nations until the end of 2027.
Exchange Rate	The average USD exchange rates of all foreign currencies were considered for the respective years. Dollar fluctuations were presumed to be insignificant enough to affect the forecast to a notable extent.
Qualitative Analysis	The qualitative analysis conducted from the quantitative data arrived at is solely based on the understanding of the market and its trends by the team of experts involved in making this report.
Market Size	Country-level production and consumption of fruit types, such as orange, lemon, lime, grapes, and other citrus fruits, were considered while deriving the value and volume of the total citrus fruit juices market.
Market Size: Growth (CAGR)	The growth of the citrus fruit juices market is assumed to be significantly influenced by the rise in consumption of health drinks, historical product launches, consumer spending on premium products, increase in adoption of modern retails, purchase volume growth by socio-economic groups for juices, as these factors are significantly impacting the growth of the citrus fruit juices market.
Price	Country-level price fluctuation of fruit types, such as orange, lemon, lime, grapes, and other citrus fruits, was studied to understand the growth of the price trend during the forecast period.
COVID-19 Impact	COVID-19 impact was considered while estimating the market size for 2020.

Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

## 2.5 LIMITATIONS AND RISK ASSESSMENT

<b>METHODOLOGY-RELATED LIMITATIONS</b> 	<ul style="list-style-type: none"><li>▪ The quantitative information on some market segments is kept confidential by industry players. Hence, qualitative insights gathered during the course of the study were used to arrive at the market size of the subsegments.</li></ul>
<b>SCOPE-RELATED LIMITATIONS</b> 	<ul style="list-style-type: none"><li>▪ Discounted price was not considered while estimating the market size in terms of value.</li><li>▪ The products discontinued are not considered under the scope of the study.</li><li>▪ Unorganized sectors are not considered while estimating the market.</li></ul>
<b>TYPE LIMITATIONS</b> 	<ul style="list-style-type: none"><li>▪ Fruit juices/drinks other than packaged juices are not considered.</li><li>▪ Squash, concentrated, purees, and syrups are not considered in the scope of the study.</li></ul>

Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

### 3 EXECUTIVE SUMMARY

The Indian citrus fruit juices market has been growing significantly owing to an increase in the number of health-conscious consumers inclined toward consuming citrus fruit juice products for their perceived health benefits. The fruit juice products in the industry are of various types: fruit drinks, 100% fruit juice (NFC), and nectars. They are produced from a range of fruit types: orange, lime/lemon, grapes, and mixed and other fruits, which include the blend of different citrus fruit juices and other fruits. These products are available in various pack sizes: 0-200 ml, 201-500 ml, 501-1000 ml, and above 1000 ml.

India is one of the most populous countries in the world, with a significant number of populations residing in rural areas. To meet the demand of these customers, various distribution channels are employed in the country. One of the most important channels is convenience stores, which are widespread across the country. By using this channel, companies cater to the demand of their customers residing in different corners of the region.

Another channel, mostly prevalent in urban areas, e-commerce, is likely to witness the fastest growth as the trend of online purchasing of food and beverage products continues to gain traction. During the pandemic and lockdown, the online sales channels witnessed a significant growth rate from consumers in India.

**TABLE 2** CITRUS FRUIT JUICES MARKET SNAPSHOT, 2022 VS. 2027

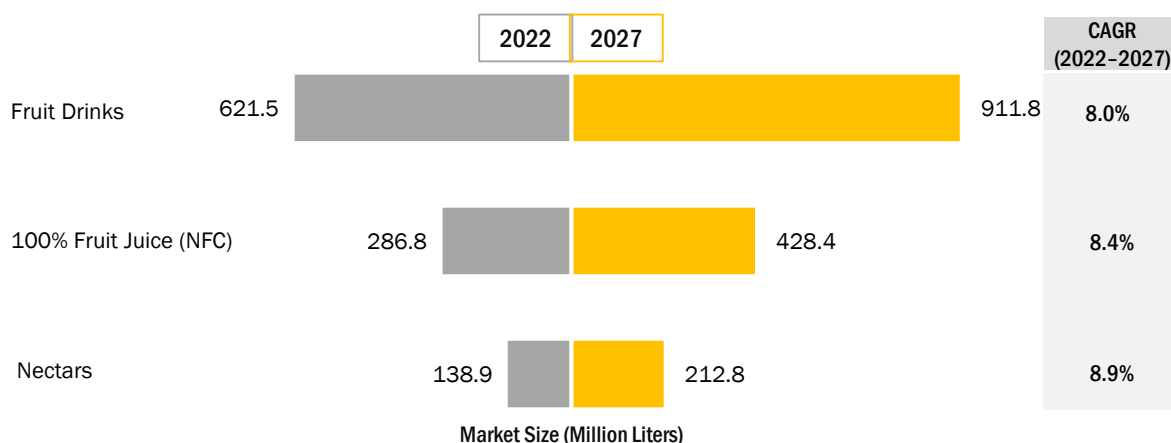
PARTICULARS	2022	2027
Indian Volume (Million Liters)	▪ 1,047.3	▪ 1,553.1
Type	<ul style="list-style-type: none"> <li>▪ Fruit Drinks: 59.3%</li> <li>▪ 100% Fruit Juice (NFC): 27.4%</li> <li>▪ Nectars: 13.3%</li> </ul>	<ul style="list-style-type: none"> <li>▪ Fruit Drinks: 58.7%</li> <li>▪ 100% Fruit Juice (NFC): 27.6%</li> <li>▪ Nectars: 13.7%</li> </ul>
Fruit Type	<ul style="list-style-type: none"> <li>▪ Orange: 47.9%</li> <li>▪ Lime/lemon: 17.0%</li> <li>▪ Grapes: 4.8%</li> <li>▪ Mixes and Others: 30.3%</li> </ul>	<ul style="list-style-type: none"> <li>▪ Orange: 47.6%</li> <li>▪ Lime/lemon: 16.7%</li> <li>▪ Grapes: 4.9%</li> <li>▪ Mixes and Others: 30.8%</li> </ul>
Pack Size	<ul style="list-style-type: none"> <li>▪ 0-200 ml: 51.3%</li> <li>▪ 201-500 ml: 8.0%</li> <li>▪ 501-1000 ml: 39.2%</li> <li>▪ Above 1000 ml: 1.5%</li> </ul>	<ul style="list-style-type: none"> <li>▪ 0-200 ml: 51.7%</li> <li>▪ 201-500 ml: 7.7%</li> <li>▪ 501-1000 ml: 39.2%</li> <li>▪ Above 1000 ml: 1.4%</li> </ul>
Distribution Channel	<ul style="list-style-type: none"> <li>▪ Convenience Stores: 67.8%</li> <li>▪ Hypermarkets and Supermarkets: 13.7%</li> <li>▪ HORECA: 10.3%</li> <li>▪ E-commerce: 6.1%</li> <li>▪ Specialty Stores: 2.1%</li> </ul>	<ul style="list-style-type: none"> <li>▪ Convenience Stores: 67.8%</li> <li>▪ Hypermarkets and Supermarkets: 13.8%</li> <li>▪ HORECA: 10.1%</li> <li>▪ E-commerce: 6.3%</li> <li>▪ Specialty Stores: 2.0%</li> </ul>
Pack Type	<ul style="list-style-type: none"> <li>▪ Bottles: 51.2%</li> <li>▪ Aseptic Carton (Tetra Pak): 41.2%</li> </ul>	<ul style="list-style-type: none"> <li>▪ Bottles: 50.4%</li> <li>▪ Aseptic Carton (Tetra Pak):</li> </ul>

- Glass Bottles: 4.7%
- Cans: 2.3%
- Stand-up Pouches: 0.6%
- Glass Bottles: 4.5%
- Cans: 2.2%
- Stand-up Pouches: 0.6%

Global CAGR (2022-2027)	8.2%
-------------------------	------

Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

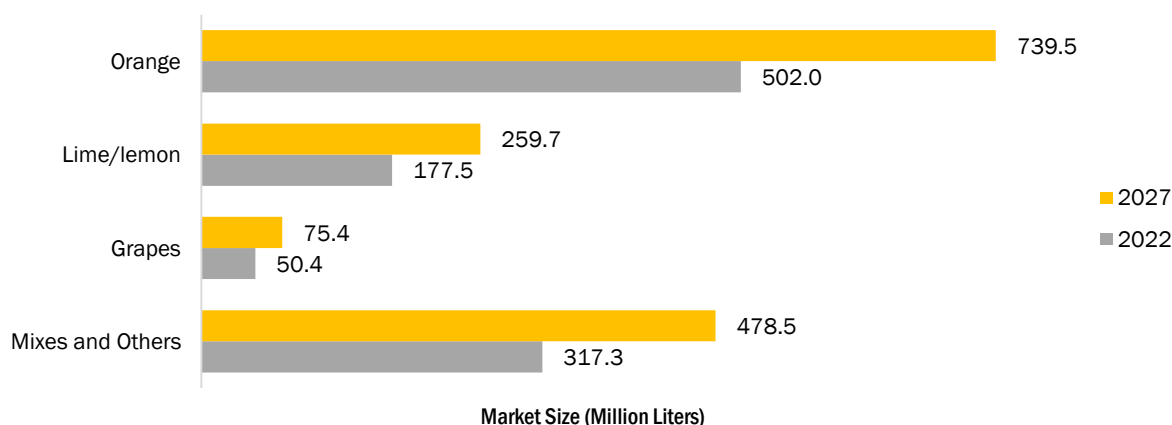
**FIGURE 6** CITRUS FRUIT JUICES MARKET, BY TYPE, 2022 VS. 2027 (MILLION LITERS)



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

Fruit drinks is estimated to be the dominant market in 2022 owing to their cost-effectiveness and ease of accessibility. These factors enable the manufacturers of fruit drinks to keep their transportation costs to a minimum, which enhances their profit margins. As a result, they are more easily accessible across the various distribution channels. Fruit drinks also have a longer shelf life than 100% fruit juices due to the addition of preservatives. The nectars market, on the other hand, is likely to witness the fastest growth over the forecast period, owing to their rich taste and flavor profile, which particularly appeals to consumers.

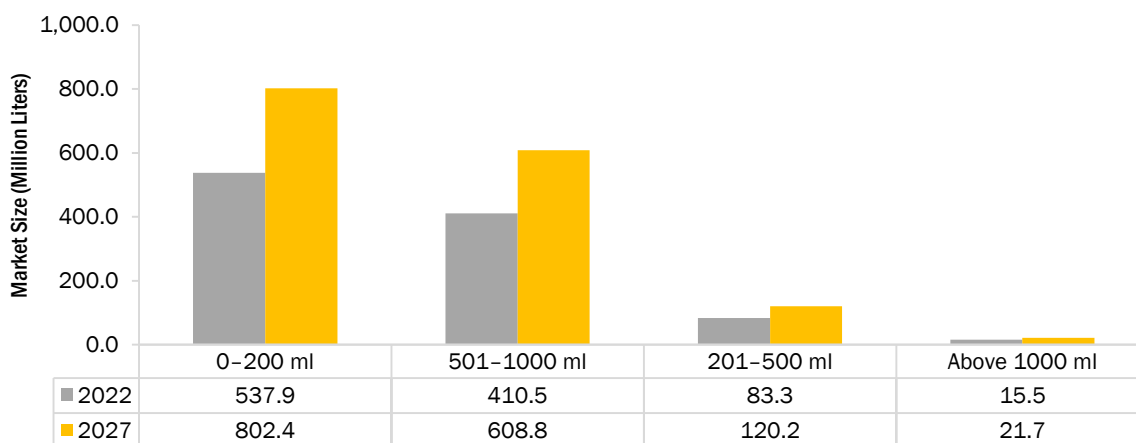
**FIGURE 7** CITRUS FRUIT JUICES MARKET, BY FRUIT TYPE, 2022 VS. 2027



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

The market for oranges accounted for the largest share in the Indian citrus fruit juices market in 2022, owing to the many health benefits associated. In addition, the rising health-consciousness among consumers has increased the demand for citrus fruit juices and orange juice, as they offer a rich source of vitamin A, vitamin C, folate, fiber, and calcium. The mixed and other fruit type segment, which includes a blend of different citrus and other fruit juices and amla, is expected to be the fastest-growing segment due to the large applicability and health benefits they offer.

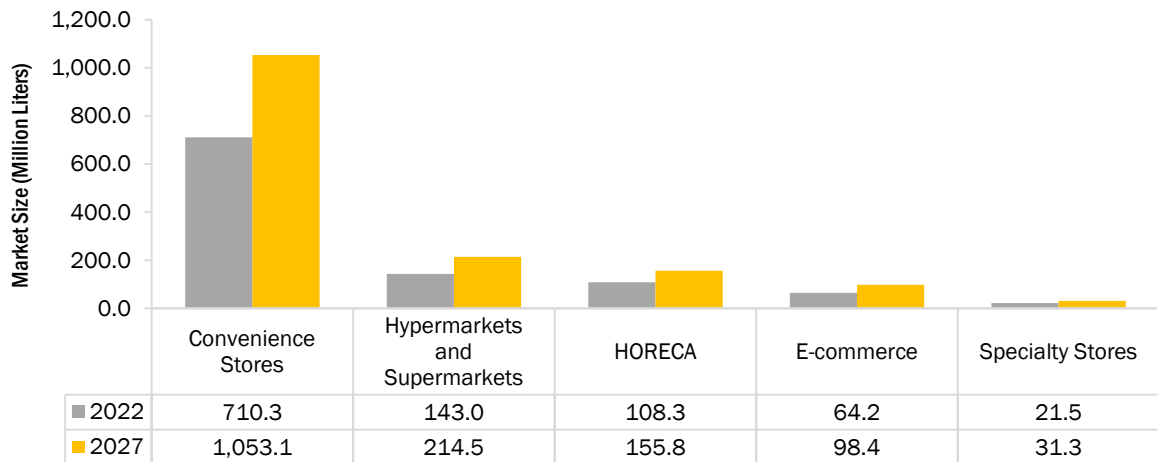
**FIGURE 8** CITRUS FRUIT JUICES MARKET, BY PACK SIZE, 2022 VS. 2027



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

Citrus fruit juices are available in various pack sizes: 0-200 ml, 201-500 ml, 501-1000 ml, and above 1000 ml. The market for 0-200 ml pack size is expected to account for the largest share in 2022. It is also expected to be the fastest-growing segment. This is attributed to the ease of portability and affordable costs of these pack sizes, which contributes to the convenience of the consumers. These pack sizes allow the manufacturers to keep their transportation costs lower as they are much easier to transport than other pack sizes.

**FIGURE 9** CITRUS FRUIT JUICES MARKET, BY DISTRIBUTION CHANNEL, 2022 VS. 2027

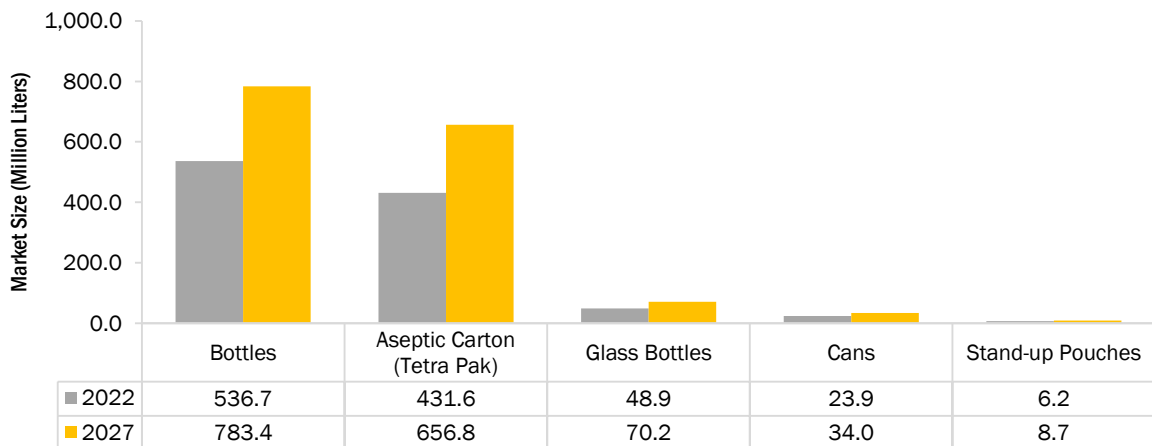


Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

The convenience stores segment is expected to account for the largest share in 2022, owing to its widespread presence across all the rural and urban areas in India, which allows the key players operating in the industry to cater efficiently to all parts of the country. The e-commerce segment accounted for the fastest-growing segment, owing to an increasing trend of online shopping for fruit juices and other food and beverage products, which is likely to increase further over the forecast period.



**FIGURE 10** CITRUS FRUIT JUICES MARKET, BY PACK TYPE, 2022 VS. 2027



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

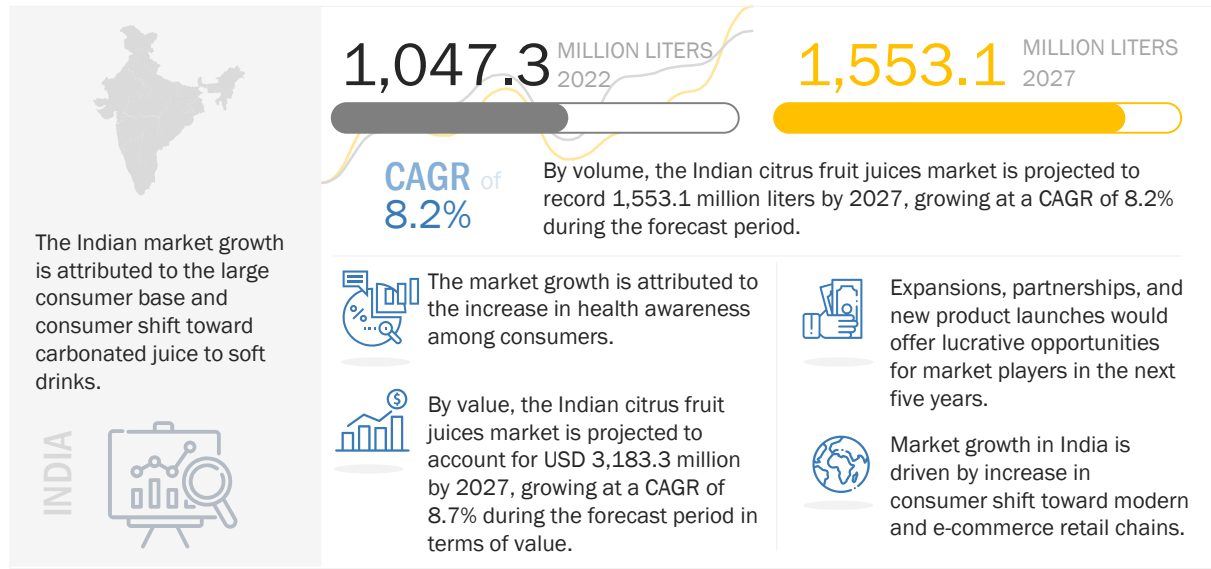
The bottles segment is expected to account for the largest share of the citrus fruit juices market in 2022. This is because of the greater convenience and portability offered by these pack types. The introduction of recyclable PET bottles has also led to greater consumer acceptance, contributing to its market growth in recent years. The aseptic carton (tetra pak) market segment is expected to be the fastest-growing segment during the forecast period, owing to its lower cost, ease of transportation, and recyclable properties, which is likely to contribute to greater consumer acceptance and increased demand over the forecasted period.

Key players in this market include PepsiCo (US), Dabur India Limited (India), ITC Limited (India), Hector Beverages Private Limited (India), Patanjali Ayurved (India), The Coca-Cola Company (US), Smoodies (India), Del Monte Foods, Inc (US), Rus Organic (India), Rakyan Beverages (India), Storia Foods (India), Spoorthy Organic Farmers (India), Axiom Ayurveda Pvt. Ltd. (India), Dole plc (US), and HealthySip (India).

## 4 PREMIUM INSIGHTS

### 4.1 ATTRACTIVE OPPORTUNITIES IN INDIAN CITRUS FRUIT JUICES MARKET

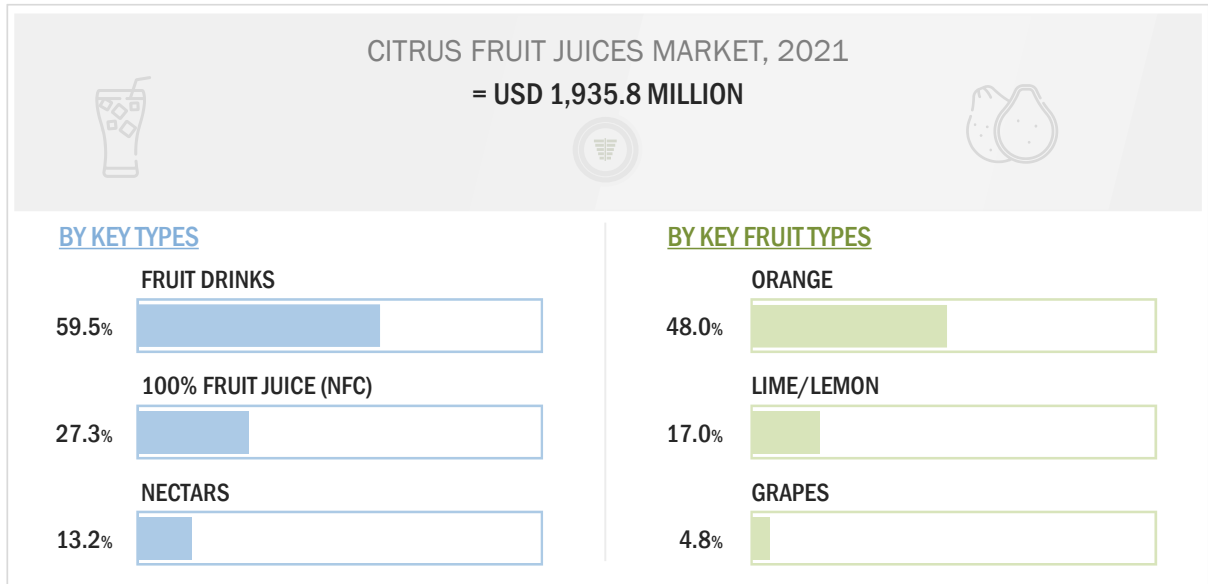
**FIGURE 11** INCREASING HEALTH AWARENESS AMONG CONSUMERS PROPELLING CITRUS FRUIT JUICES MARKET GROWTH



Source: Secondary Sources, Primary Interviews, Related Research Publications, Press Releases, Industry-related Journals & Books, and MarketsandMarkets Analysis

## 4.2 CITRUS FRUIT JUICES MARKET, BY TYPE AND FRUIT TYPE

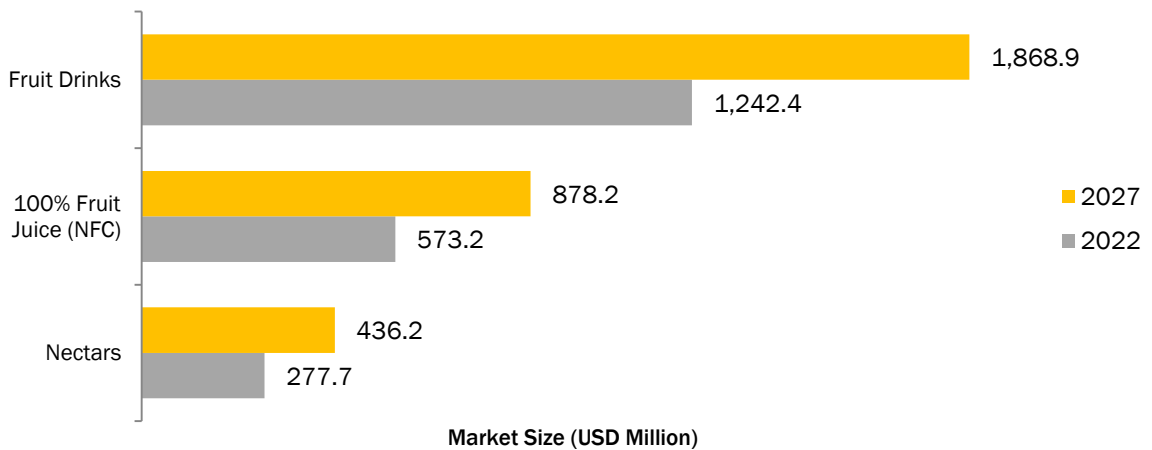
**FIGURE 12** FRUIT DRINKS AND ORANGE SEGMENTS ACCOUNTED FOR SIGNIFICANT SHARE IN INDIAN CITRUS FRUIT JUICES MARKET IN 2021



Source: Secondary Sources, Primary Interviews, Related Research Publications, Press Releases, Industry-related Journals & Books, and MarketsandMarkets Analysis

## 4.3 CITRUS FRUIT JUICES MARKET, BY TYPE

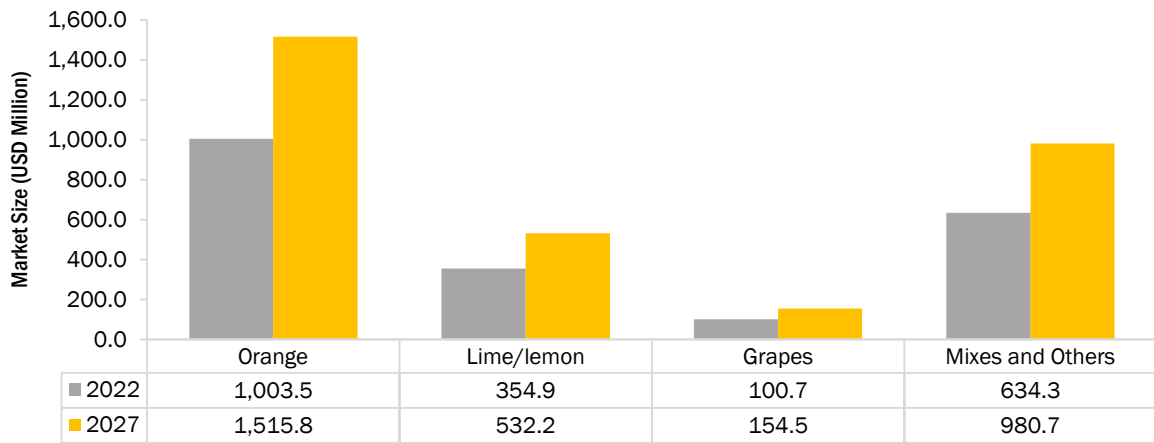
**FIGURE 13** FRUIT DRINKS SEGMENT EXPECTED TO DOMINATE MARKET BY 2027



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry-related Journals & Books, and MarketsandMarkets Analysis

### 4.4 CITRUS FRUIT JUICES MARKET, BY FRUIT TYPE

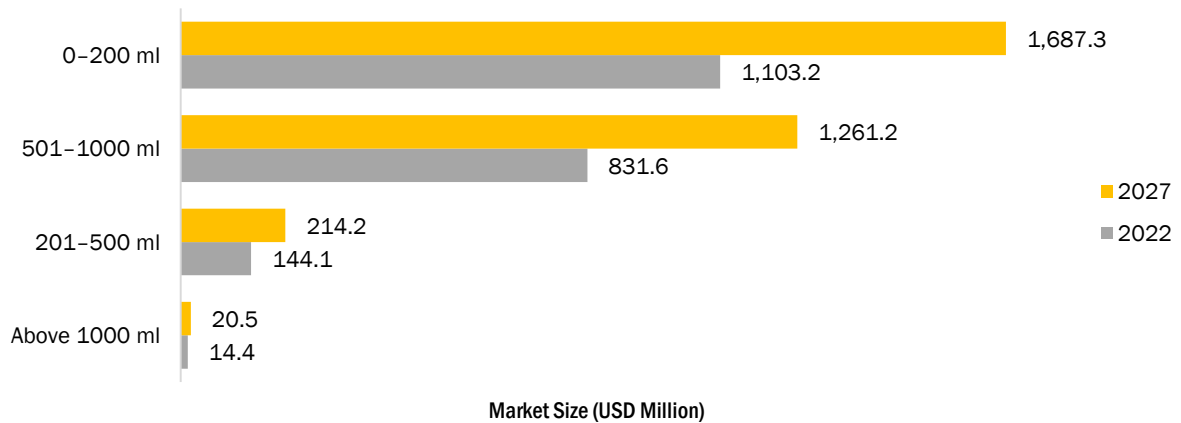
**FIGURE 14** ORANGE SEGMENT EXPECTED TO DOMINATE MARKET BY 2027



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry-related Journals & Books, and MarketsandMarkets Analysis

### 4.5 CITRUS FRUIT JUICES MARKET, BY PACK SIZE

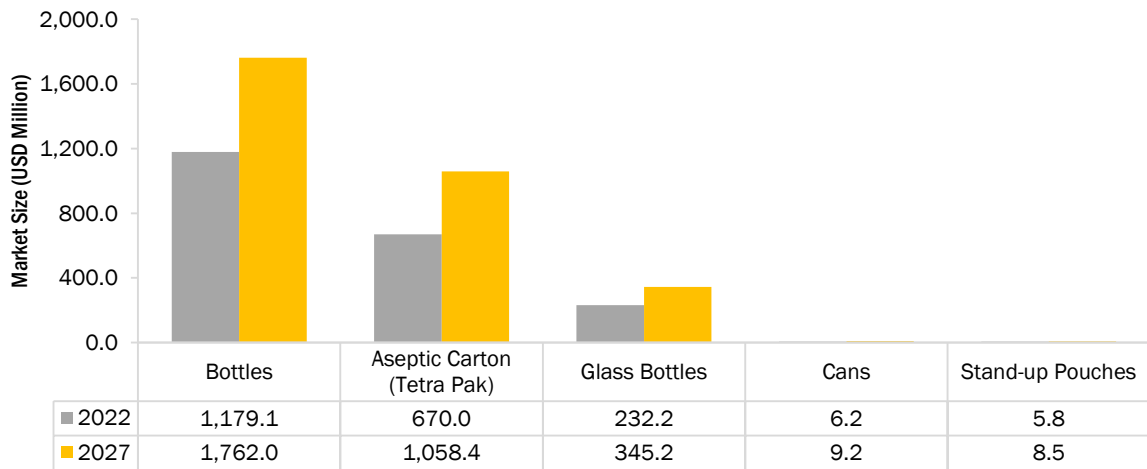
**FIGURE 15** 0-200 ML SEGMENT EXPECTED TO DOMINATE MARKET BY 2027



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry-related Journals & Books, and MarketsandMarkets Analysis

## 4.6 CITRUS FRUIT JUICES MARKET, BY PACK TYPE

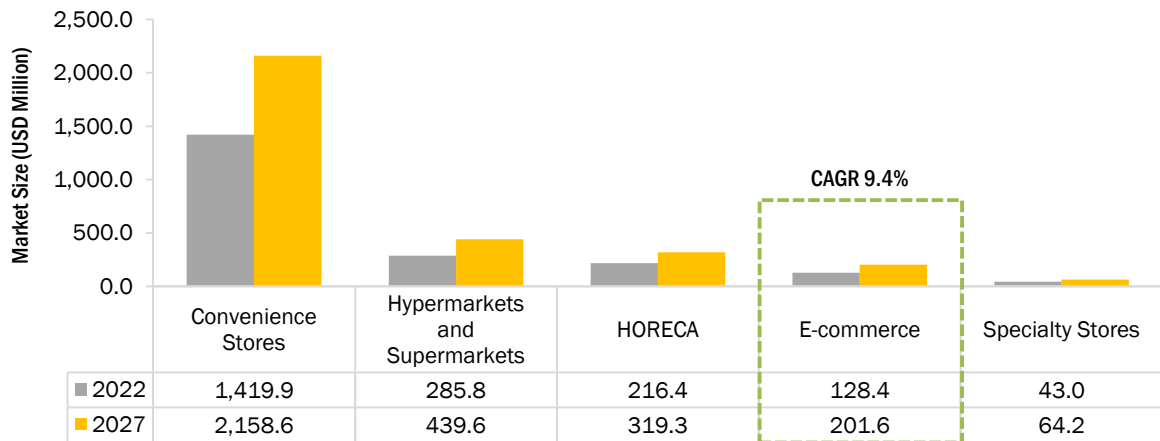
**FIGURE 16** BOTTLES SEGMENT EXPECTED TO DOMINATE MARKET BY 2027



Source: Secondary Sources, Primary Interviews, Related Research Publications, Press Releases, Industry-related Journals & Books, and MarketsandMarkets Analysis

## 4.7 CITRUS FRUIT JUICES MARKET, BY DISTRIBUTION CHANNEL

**FIGURE 17** CONVENIENCE STORES SEGMENT EXPECTED TO DOMINATE MARKET BY 2027



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry-related Journals & Books, and MarketsandMarkets Analysis

## 5 MARKET OVERVIEW

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### 5.1 INTRODUCTION





In India, the market for citrus fruit juices is growing. This is because people are shifting toward health-conscious products and increasing their consumption of fruit juices, as they offer a rich source of nutrients and phytochemicals, such as flavonoids, amino acids, triterpenes, phenolic acids, and carotenoids. Citrus fruit juices are processed from various citrus fruits, such as oranges, grapes, lime, lemons, and other mixed fruits. They are made available in various pack types, such as bottles, glasses, cans, aseptic cartons, and stand-up pouches, and are distributed through various channels, such as hypermarkets and supermarkets, convenience stores, HORECA, e-commerce, and other distribution channels.

Changing lifestyles and market penetration by various global players in the Indian citrus fruit juices market have contributed to easier access and increased the demand for citrus fruit juices. These are also mixed or blended with other fruit juices, which increase their applicability in the market and contribute to their demand. Modern processing technologies in the citrus fruit industry have contributed significantly to enhancing their flavors and extending their shelf lives without the usage of preservatives, which has influenced consumers to shift from soft drinks and carbonated drinks to citrus fruit juices in recent years.

The citrus fruit juices market in India is driven by the rising number of informed buyers who are label-conscious and influenced by natural and organic products. Owing to this, many companies operating in the Indian citrus fruit juices market are focusing on organic farming practices and sourcing techniques to brand their products as health juices that are free from added sugar and preservatives. This enables them to gain significant traction in the market. Additionally, recyclable packaging options have appealed significantly among consumers and have contributed substantially to the growth of the citrus fruit juices market in India in recent years.

## 5.2 MARKET DYNAMICS

**FIGURE 18** CITRUS FRUIT JUICES MARKET DYNAMICS

 <b>DRIVERS</b>	<ul style="list-style-type: none"> <li>▪ Increasing health awareness about benefits of citrus fruit juices</li> <li>▪ Modern retail stores promoting citrus fruit juice products</li> <li>▪ Steady decline in rural-urban consumption gap</li> </ul>
 <b>RESTRAINTS</b>	<ul style="list-style-type: none"> <li>▪ Bitterness of citrus fruit juices impacting consumer acceptability</li> <li>▪ Citrus allergy and other side-effects</li> <li>▪ Preference for homemade fresh juices over packaged fruit juices</li> </ul>
 <b>OPPORTUNITIES</b>	<ul style="list-style-type: none"> <li>▪ Consumers shifting from soft drinks to citrus fruit juices</li> <li>▪ Wider availability of products and their longer shelf life</li> <li>▪ Recyclable and environmentally friendly packaging options</li> </ul>
 <b>CHALLENGES</b>	<ul style="list-style-type: none"> <li>▪ Presence of unorganized players making market highly competitive</li> <li>▪ Stringent regulatory labelling rules on packaged fruit juices</li> <li>▪ Diseases and seasonal changes affecting cultivation</li> </ul>

Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

### 5.2.1 DRIVERS

#### 5.2.1.1 Increasing health awareness about benefits of citrus fruit juices

Changing preferences have shown the inclination of consumers toward adopting a nutritional diet for a healthy lifestyle. Citrus fruit juice products contain essential vitamins and fibers that help lower LDL cholesterol and triglycerides. They have been proven to be effective against various health issues, such as kidney stones, cancers, and cardiovascular diseases. In addition, they offer a range of cognitive and health benefits beneficial for brain health. Consumers prefer natural and organic products because of such health benefits. Owing to this, many companies in the citrus fruit juice industry have started offering organic fruit juices and health juices in recent years, which enhances health and strengthens the immunity of the body. During the pandemic, the sales of citrus fruit juices, such as orange juices, boomed via online and other sales channels because of their immunity-boosting properties.

#### 5.2.1.2 Modern retail stores promoting citrus fruit juice products

The modern retail stores and hypermarkets and supermarkets offer a range of citrus fruit juice products to consumers. These types of stores offer a wide range of options and product offerings, which drive the impulse purchasing behavior of consumers. In-store display and merchandising of the products are significant factors that impact the impulse purchase activity of consumers, followed by suggestive selling from employees. Companies operating in the citrus fruit juice industry have been innovating their products and catering especially to the rising demand from the modern health-aware consumers by introducing and branding their products as health juices that are organic and offer a range of health benefits. These factors also contribute significantly toward impulse purchasing behavior demonstrated by consumers via offline and online sales channels.

Another way modern retailers promote impulse purchasing behaviors is by offering attractive offers and discounts, which contribute significantly to impulse purchases. Key players in the industry emphasize package designs for their fruit juices because they not only play a significant role in the preservation of the products but also contribute to attracting the attention of consumers, which can make their product stand out compared to the rest of the products. For instance, RAW Pressery, a brand of Rakyan Beverages (India), collaborated with the global movie franchise 'Spiderman: No Way Home (US)' in January 2022 to bring out the limited edition bottles for their orange juice products, which were made available across the country through online and offline sales channels. This strategic initiative was undertaken to enhance their brand awareness by innovating their package designs, which helped them to enhance their customer base.

### 5.2.1.3 Steady decline in rural-urban consumption gap

The Indian citrus fruit juice industry has been experiencing strong growth in rural areas. According to an official representative of PepsiCo (India), the demand from rural India has been very strong, while the urban markets have been more challenging because of the strong competition offered by other players in the industry. The wide network of small-scale convenience stores in rural places has made citrus fruit juices much more accessible, which has contributed to the rising demand and growth of the industry. There has been a growing demand for health and wellness products in tier-2 cities and rural areas, contributing to the demand for citrus fruit juices in recent years because of their perceived benefits for personal health.

The key players operating in the citrus fruit juice industry have been expanding their operations in rural areas to gain a dominant market share. For instance, The Coca-Cola Company (US), in February 2022, announced plans to expand its operations and network in rural areas of India, which contributes to 38% of its overall business. An official company representative said the company intends to achieve this by expanding its product portfolio and strengthening its marketing and distribution capabilities, giving it a stronghold in the industry. Due to the reduction in the consumption gap between rural and urban areas, the key players operating in the Indian citrus fruit juice industry are likely to have significant business opportunities in rural areas over the forecasted period.

## 5.2.2 RESTRAINTS

### 5.2.2.1 Bitterness of citrus fruit juices impacting consumer acceptability

Citrus fruit juices have a natural inherent undesirable bitter taste due to which they encounter commercial restrictions, which reduces their shelf lives and consumer acceptability. The major components of citrus fruit juices, which contribute to their bitterness, include limonin and naringin. The processing of citrus fruit juices also involves debittering of citrus juices with a range of processes, such as lye treatment, the addition of sugars,  $\beta$ -cyclodextrin, hot water treatment, etc., due to which the manufacturers have to incur significant production costs. Limonin is particularly found in higher volumes in juices with a short maturation time. Fruits, such as navel oranges and grapefruits, contribute a significant amount of bitterness, lowering their market value. Nominin, a form of limonoid that is much more bitter in comparison to limonin, is found in concentrations of commercial grapefruit, which contributes to their bitterness problem.

The bitterness in citrus fruit juices is a key hindrance in the citrus fruit juice industry. Therefore, the companies have constantly been looking for cost-effective methods to process citrus fruit juices, which can enhance their profit margins. Significant research has been conducted to find cost-effective ways of debittering citrus fruit juices without affecting the essential nutrients offered by the different citrus fruit juice products. Hence, these factors are expected to restrain the growth of the citrus fruit juices market.



### 5.2.2.2 Citrus allergy and other side-effects

Many people have citrus allergies in India. This mandates them to opt for other non-citrus fruit juices. Citrus fruit allergy can cause various health issues, such as skin redness, skin burns, itching, swelling, and blisters. Citrus allergy can be caused due to cross-reactivity, limonene allergy, and systemic allergy. Citrus fruit juices, such as orange juice, have also been associated with other side effects, such as digestive problems causing abdominal cramps and diarrhea, which are caused by the excess fiber in orange juices.

Other problems associated with orange juice, when consumed in excess amounts, include nausea, vomiting, headaches, bloating, and insomnia. Furthermore, lemon juice has also been associated with significant side effects, such as enamel erosion or tooth decay, migraines, stomach problems, heartburn, and mouth ulcers. Citrus fruit juices also have added sugar, which contributes to health issues, such as obesity, diabetes, etc., if consumed in excessive amounts. These side effects pose a major challenge for citrus fruit juice products, which influences many people to shift away from citrus fruit juice products to other options.

### 5.2.2.3 Preference for homemade fresh juices over packaged fruit juices

Fresh juices and homemade juices hold a better perception with regard to human health and performance compared to packaged fruit juices. Fresh citrus fruit juices have better fiber content, better digestive properties, saves energy, and are considered to be much more superior in terms of containing essential nutrients and antioxidants than packaged fruit juices available in stores. The fresh juice stalls and small-scale unorganized beverage stores in the Indian market make the market more competitive for key players operating in the citrus fruit juice industry. Usually, store-bought packaged fruit juices are associated with added sugars and preservatives, which contributes to their negative perception compared to homemade fresh juices. The World Health Organization (WHO) has also laid specific guidelines for countries to reduce their sugar consumption in children and adults, which can lead to a range of problems, such as obesity and tooth decay.

Fresh fruit juices are also known to contain glutathione, a protein that aids the human body in the detoxification process from substances, such as lead and pesticides. Most processed and packaged fruit juices are known to not contain this protein. There have also been cases of misbranding and misrepresentation of packaged fruit juices in the Indian citrus fruit juice industry, which has attracted penalties and legal actions from the government. This has further dented the credibility and reputation of packaged citrus fruit juices in recent years compared to fresh homemade juices.

## 5.2.3 OPPORTUNITIES

### 5.2.3.1 Consumers shifting from soft drinks to citrus fruit juices

In recent years, consumers have become much more health-conscious. They demonstrate a much higher level of awareness toward the environment and personal health. Owing to this, there has been a significant shift in consumer preferences toward citrus and other fruit juices from soft drinks and other fizzy beverages that contain a higher amount of sugar and preservatives. A study published by Xavier Institute of Management, Bhubaneswar (XIMB) in the British Food Journal stated that youths prefer fruit juices much more than soft drinks. This change in consumer preferences and dietary consumption has presented significant business opportunities for the citrus fruit juice industry and packaged fruit juices.

The buying pattern of Indian consumers has also been influenced by various diseases, such as diabetes, due to which many people in the country are making extensive efforts to reduce their sugar consumption. According to data published by International Diabetes Federation Diabetes Atlas (IDF Atlas) in 2019, India has an estimated 77 million diabetics. It is expected to retain the second position in the highest number of diabetic patients till 2045 at a global level. This increased diabetic and health-conscious population in the country are expected to continue to present significant business opportunities for citrus fruit juice products

over the forecasted period, especially the products that do not contain high levels of sugar and preservatives and contain 100% juices.

### 5.2.3.2 Wider availability of products and their long shelf life

One significant advantage that packaged citrus fruit juices have over fresh juices is their long shelf life. Packaged fruit juices manufactured by key players in the industry and made available on online sales channels and other distribution channels, such as supermarkets and hypermarkets and convenience stores, have a longer shelf life, owing to their extensive processing techniques. Companies and manufacturers use a range of processing techniques, such as pasteurization and pascalization or high hydrostatic pressure processing, to extend the shelf life of their juice products, which would help reduce food wastage, increase profit margins, and enhance brand reputation. Packaging of citrus fruit juices also plays a significant role in the preservation and extension of the shelf life of citrus fruit juice products. New methodologies, such as barrier coating on polyethylene terephthalate (PET) bottles, are being introduced that can significantly contribute to the extension of shelf life without the usage of any added preservatives or chemicals.

The extended shelf life of citrus fruit juices also allows the companies to cater to the rising demand in the citrus fruit juice industry. Citrus fruits are seasonal, but the demand for citrus fruit juice products remains constant throughout the year. The extended shelf life of citrus fruit juices allows the company to store its products efficiently for longer periods. This allows the key players operating in the Indian citrus fruit juice industry to meet the demand from consumers throughout the year and enhance their profit margins.

### 5.2.3.3 Recyclable and environmentally friendly packaging options

In the current scenario, consumers in India demonstrate a higher level of awareness of personal health and environmental health. Their product choices are significantly influenced by packaging options that are recyclable and environmental-friendly. Therefore, key players operating in the industry are increasingly engaging in launching their products in recyclable packaging options to further expand their customer base in India. For instance, ITC Limited (India), in May 2019, launched their B natural brand of fruit juices in completely recyclable and environmentally friendly PET bottles, owing to the higher preference shown toward these packaging by consumers. Tropicana, a brand of PepsiCo (US), in August 2020, launched its juice range in recyclable PET bottles in India to strengthen its brand reputation and expand its customer base across the country.

The Government of India (GOI) has also been taking extensive efforts to minimize the usage of single-use plastic in India, which is not recyclable and is severely damaging the environment. Recently, in July 2022, a ban was imposed on single-use plastic throughout India, which has further increased the opportunities for recyclable and environmentally friendly packaging options, such as PET bottles, aseptic cartons (tetra pak), and glass bottles. This increased focus on environmental health and usage of recyclable products by consumers in India, with support from the government and other administrative authorities, will continue to pose significant business opportunities for the companies offering their products in recyclable packaging over the forecasted period.

## 5.2.4 CHALLENGES

### 5.2.4.1 Presence of unorganized players making market highly competitive

The Indian citrus fruit juices market is highly competitive owing to the presence of a large number of small-scale players who have a better understanding of local flavors and consumer preferences. This is expected to create challenges for foreign companies to enter the Indian market. These local players offer the consumers a variety of options at lower prices. Owing to this, the organized players should competitively price their products in the market, which poses a serious challenge for foreign companies who look to enhance their profit margins by expanding and investing in different countries and regions. To counteract

the stiff competition, foreign companies have to spend significantly on their marketing and advertisement to increase their reach and brand visibility in India.

The Indian government has also been highly active in encouraging the usage of local products and goods produced in India. Various initiatives, such as 'Vocal for Local' and 'Make in India,' were launched to support the usage and consumption of locally produced goods and products, which were aimed at making India self-reliant and reducing the dependency on foreign products. These initiatives were instrumental in bolstering the growth of local Indian brands, which also attracted many newer start-ups to enter the market in recent years, posing competition for foreign and other global players. Consumers are showing a higher preference for choosing Indian brands and local products than foreign brands in recent years. The trend is likely to continue to grow over the forecasted period, which will continue to pose significant challenges for foreign companies in terms of entering the Indian market and enhancing their profit margins.

#### **5.2.4.2 Stringent regulatory labeling rules on packaged fruit juices**

There have been stringent regulatory challenges pertaining to labeling rules for packaged fruit juices in India in recent years. The Bureau of Indian Standards (BIS), in April 2021, specified that fruit juices containing sugar or syrup as an ingredient would have to label their product as 'sweetened fruit juices.' These would include all the different types of fruit drinks and nectars that contain sugar as an ingredient, and this initiative was undertaken as a quality control measure. This added labeling would aid the health-conscious consumers in differentiating these products from 100% fruit juice products and would also be effective against misbranding and mislabeling of the packaged fruit juices.

This added labeling for sugar content is likely to contribute to the negative perception among the growing category of health-conscious consumers looking for healthier alternatives to supplement their health and boost their immunity. This would raise challenges for the companies offering these products. With the rising focus on health awareness in the country, fruit drinks and nectars might risk losing a significant customer base, owing to these strict labeling rules and negative perceptions. According to the data published by the National Family Health Survey (NFHS-5) data, one in every four people in India is overweight. With obesity being a serious health concern in India, more consumers are likely to shift from sugary packaged fruit juices and beverages over the forecasted period.

#### **5.2.4.3 Diseases and seasonal changes affecting cultivation**

The citrus greening disease, also known as Huanglongbing (HLB), severely impacts and affects the production of fruits in several parts of India. It has led to the death of thousands of citrus trees in the country. The trees affected by the disease produce smaller fruits that are more bitter than other citrus fruits. The citrus greening disease is often mistaken for nutrient deficiency, as they have similar symptoms, such as stunted growth and irregular shape of fruits. Due to this, the diagnosis is often delayed.

The citrus greening disease makes the supply chain inconsistent in India for fruit processing. Due to low per capita availability, most fruits produced in India are sold in retail markets, leaving a marginal supply for juice processing. Thus, the disease is a major challenge for the growth of citrus fruit producers and various companies operating in the citrus fruit juice industry. In addition, severe heatwaves in various parts of India in summers contribute significantly to the decline in orange production in the country. An official representative of the All India Indo-Bangla Orange Association mentioned in May 2022 that due to the severe heatwave in the country, a dip in production of oranges was expected in India, which had directly impacted the citrus fruit juice industry. These factors pose as challenges to the growth of the market.

## 6 INDUSTRY TRENDS

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### 6.1 INTRODUCTION

Citrus fruit juices are available in fruit drinks, 100% juices (NFC), and nectars. Many consumers are shifting from carbonated soft drinks to fruit juices with broader availability and longer shelf-life. These factors pose an opportunity for the Indian citrus fruit juices market. Additionally, modernization in the retail segment in India has contributed to the rise in product transparency. Hence, consumers are willing to purchase products according to their requirements and health benefits options, contributing to the increase in demand for health benefits fruit juices.

Citrus fruit juice manufacturers are implementing growth strategies, such as new product developments, expansions & investments, and partnerships, with other organizations to gain a competitive edge in the market. Consumers are also emphasizing the quality and nutritional benefits of fruit juices instead of the quantity of products. Furthermore, most consumers in India are looking for immunity claims and other health benefits in product labeling while buying fruit juices. This will further help them to achieve their health goals.

Several manufacturers produce citrus fruit juices. Therefore, they must follow a stringent value chain mechanism to withstand intense competition. Product development and process methodologies in the value chain stand out as significant indicators of a product's success in the market. The Food Safety and Standards Authority of India (FSSAI) assigns high priority to food safety and regulations in India.

### 6.2 VALUE CHAIN

This section of the report categorizes the value chain representatives for a more comprehensive understanding of the effective distribution of products to the end-user and stakeholders, resulting in the smooth function of the business. This value chain plays a vital role in developing the citrus fruit juices market by increasing product awareness. The entire value chain for the market is highly integrated.

The citrus fruit juices market value chain includes several activities, such as research & development, sourcing of raw materials, manufacturing and processing of citrus fruit juices, packaging & storage, distribution, and marketing & sales of the product, each of which is elaborated as follows:

#### 6.2.1 RESEARCH AND PRODUCT DEVELOPMENT

Research and development is a crucial part of the juice industry. R&D helps trade in the international food and beverage and nutrition businesses. The ingredients used in the manufacturing of citrus fruit juices should be of good quality, which would provide optimum nutrition to the consumer and cause a negligible impact on the environment. Research models lead to various developments and efficient extraction of juices from fruits.

#### 6.2.2 RAW MATERIAL SOURCING

Raw material sourcing plays a crucial part in citrus fruit juice manufacturing. Citrus fruits can be directly sourced from fruit processors or growers. Various fruit juice manufacturing companies establish sourcing systems with farmers and raw material providers to make acquiring raw materials smoothly. The manufacturing phase consists of keeping a record of the raw materials used, manufacturing, packaging, and expiration dates. Other ingredients, such as sugar, additives, and preservatives, depend on the types of juices manufactured. Thus, the sourcing stage helps procure the necessary components to manufacture citrus fruit juices.

### 6.2.3 PRODUCTION AND PROCESSING

It is the second most crucial step and adds great value to the value chain while focusing on production and processing. The extraction process is a prominent part of the value chain, as it determines the percentage of pulp extracted from various citrus fruit sources. This is followed by straining, filtration, and clarification. Once clarification is done, the main product is removed in the form of not from concentrates (NFC) and concentrates. Once it gets transported, it is re-processed to prepare different citrus fruit juices, such as fruit drinks, 100% juices (NFC), and nectars.

### 6.2.4 PACKAGING AND STORAGE

Packaging of citrus fruit juices can be in different packs and pack types. Pack sizes can range from 0-200 ml pack size to above 1000 ml pack size. Pack types used for citrus fruit juices include bottles, aseptic cartons (tetra pak), glass bottles, cans, and stand-up pouches.

### 6.2.5 DISTRIBUTION

A proper distribution channel provides access to customers and acquires instant feedback, which is crucial for improving the products. Most of the citrus fruit juices are distributed to wholesalers/distributors. Other distribution network includes traders & agents, supermarkets, and hypermarkets.

### 6.2.6 MARKETING AND SALES

An end product enters the market to cater to different consumer needs. Still, before the sales, the product must be authorized by the respective regulatory authority to obtain certificates for sales and marketing. To get the approval, manufacturing companies must submit required data regarding the safety and efficacy of the product in a set format. The regulatory authority is constantly reviewing and framing laws to enhance the entire process as per the scope and function of the food and beverage industry.

**FIGURE 19** VALUE CHAIN ANALYSIS OF CITRUS FRUIT JUICES MARKET

VALUE ADD											
0%-10%		11%-40%		41%-70%		71%-80%		81%-90%		91%-100%	
STAGES											
<b>RESEARCH AND DEVELOPMENT</b>		<b>SOURCING</b>		<b>PRODUCTION AND PROCESSING</b>		<b>PACKAGING AND STORAGE</b>		<b>DISTRIBUTION</b>		<b>MARKETING AND SALES</b>	
<ul style="list-style-type: none"> <li>▪ Technological analysis</li> <li>▪ Product analysis</li> <li>▪ Extraction techniques</li> <li>▪ Testing</li> <li>▪ Analysis</li> </ul>		<ul style="list-style-type: none"> <li>▪ Sourcing of fruits from,</li> <li>▪ Fruit processors</li> <li>▪ Growers</li> <li>▪ Other ingredients, such as sugar, additives, preservatives, among others</li> </ul>		<ul style="list-style-type: none"> <li>▪ Cleaning and washing</li> <li>▪ Sorting</li> <li>▪ Extraction</li> <li>▪ Straining, filtration, and clarification</li> <li>▪ Blending</li> <li>▪ Filling</li> </ul>		<ul style="list-style-type: none"> <li>▪ Sealing and sterilization</li> <li>▪ Cooling</li> <li>▪ Labeling</li> <li>▪ Packaging</li> </ul>		<ul style="list-style-type: none"> <li>▪ Wholesalers/distributors</li> <li>▪ Traders and agents</li> <li>▪ Supermarkets and hypermarkets</li> </ul>		<ul style="list-style-type: none"> <li>▪ Retailers</li> <li>▪ HORECA</li> <li>▪ End users</li> </ul>	
<b>REGULATORY APPROVAL AND QUALITY AND SAFETY</b>											

Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

## 6.3 MARKET MAPPING AND ECOSYSTEM OF CITRUS FRUIT JUICES

The market mapping of the ecosystem is categorized into demand-side and supply-side companies.

### 6.3.1 DEMAND SIDE

The demand side of the ecosystem includes distributors, wholesalers, supermarket & hypermarket chains, modern & traditional retail chains, food service, e-commerce companies, and specialty stores. Finally, the products reach the end consumers. The demand for citrus fruit juices is enormous as manufacturing companies are continuously investing in developing new products of high quality and with a longer shelf-life.

### 6.3.2 SUPPLY SIDE

The market supply covers fruit processors and growers, fruit juice manufacturers, regulatory bodies, certification providers, and start-ups. The key citrus fruit juice suppliers in this market are PepsiCo (US), Dabur India Limited (India), ITC Limited (India), Hector Beverages Private Limited (India), Patanjali Ayurved (India), The Coca-Cola Company (US), Smoodies (India), Del Monte Foods, Inc. (US), Rus Organic (India) and Rakyen Beverages (India).

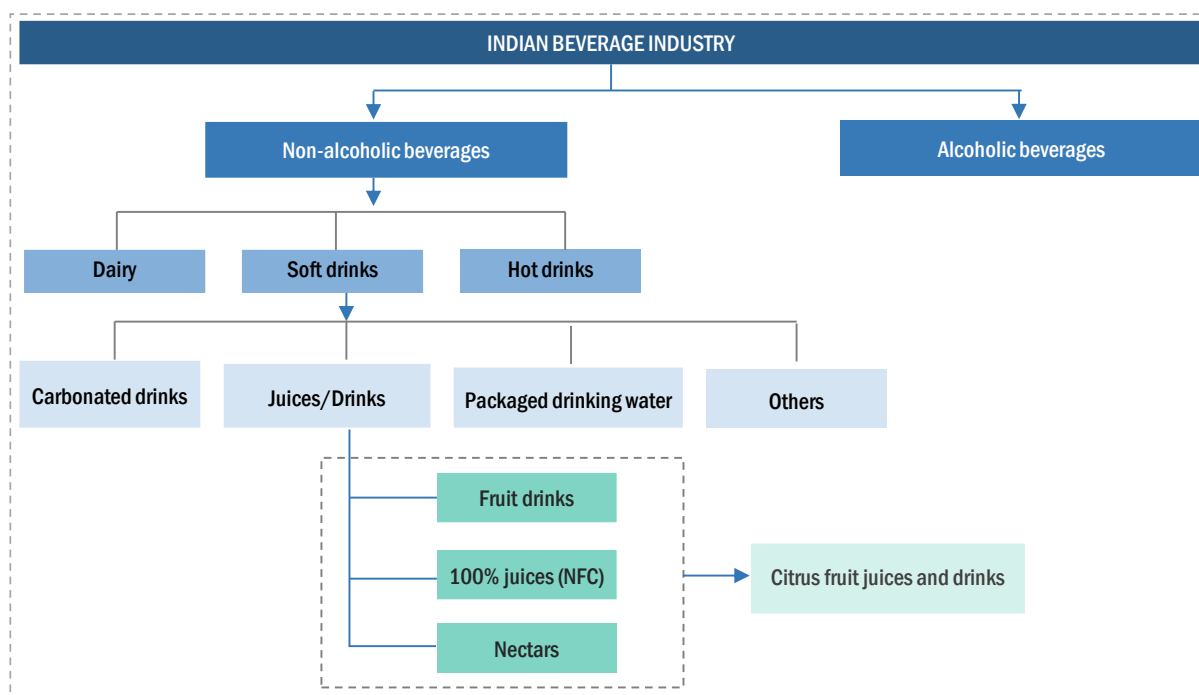
**FIGURE 20** CITRUS FRUIT JUICES: MARKET MAP



Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis



**FIGURE 21** CITRUS FRUIT JUICES: ECOSYSTEM MAPPING



Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

**TABLE 3** CITRUS FRUIT JUICES: SUPPLY CHAIN (ECOSYSTEM)

COMPANY	ROLE IN ECOSYSTEM
PepsiCo (US)	Citrus fruit juices manufacturer
Dabur India Limited (India)	Citrus fruit juices manufacturer
ITC Limited (India)	Citrus fruit juices manufacturer
Hector Beverages Private Limited (India)	Citrus fruit juices manufacturer
Patanjali Ayurved (India)	Citrus fruit juices manufacturer
The Coca-Cola Company (US)	Citrus fruit juices manufacturer
Smoodies (India)	Citrus fruit juices manufacturer
Del Monte Foods, Inc. (US)	Citrus fruit juices manufacturer
Rus Organic (India)	Citrus fruit juices manufacturer
Rakyan Beverages (India)	Citrus fruit juices manufacturer
Storia Foods (India)	Citrus fruit juices manufacturer
Spoorthy Organic Farmers (India)	Citrus fruit juices manufacturer
Axiom Ayurveda Pvt. Ltd. (India)	Citrus fruit juices manufacturer
Dole plc (US)	Citrus fruit juices manufacturer
HealthySip (India)	Citrus fruit juices manufacturer

The New Shop	Retailer
DMart	Retailer
StarBazaar	Retailer
Spencer's	Retailer
More Retail Private Limited	Retailer
Varun Beverages Ltd	Distributor
JioMart	E-commerce
Blinkit	E-commerce
BigBasket	E-commerce
Amazon Pantry	E-commerce
Nature's Basket	E-commerce
Flipkart	E-commerce
KFC	Foodservice
McDonald's Corporation	Foodservice
The Food Safety and Standards Authority of India (FSSAI)	Regulatory bodies
Bureau of Indian Standards	Regulatory bodies
Ministry of Consumer Affairs, Food, and Public Distribution	Regulatory bodies
Ministry of Food Processing Industries, Government of India	Regulatory bodies
Central Board of Indirect Taxes and Customs (CBIC)	Regulatory bodies

Source: Industry Publications and MarketsandMarkets Analysis

## 6.4 PORTER'S FIVE FORCES ANALYSIS

Porter's five forces analysis is a significant business analysis model that helps understand the market dynamics and current positioning of the market stakeholders, including buyers, suppliers, and influential players in the value chain. It also helps understand the threat posed by substitutes and new entrants, the two significant factors that can influence the market drastically over time. The five forces model measures competitive intensity, attractiveness, and profitability.

The competitive environment prevailing in the Indian citrus fruit juices market can be analyzed with the help of Porter's five forces analysis. Porter's five forces model provides a framework to explore the implications of market trends and consumer demand through a deeper look at each of the five factors of the fruit juices industry. The analysis below enables an improved understanding of market dynamics in the citrus fruit juices market. The factors that affect the existing business environment, along with the demand and supply in the market, are analyzed.



**TABLE 4** CITRUS FRUIT JUICES MARKET: PORTER'S FIVE FORCES ANALYSIS

PORTER'S FIVE FORCES	IMPACT
Degree of Competition	High
Bargaining Power of Suppliers	Low to Moderate
Bargaining Power of Buyers	Moderate to High
Threat of Substitutes	Moderate
The threat of New Entrants	Moderate

Source: Secondary Literature and MarketsandMarkets Analysis

### 6.4.1 DEGREE OF COMPETITION

The degree of competition in the market is based on the number of players in the market and the level of demand. The Indian citrus fruit juices market is accelerating its growth with a huge opportunity. Many established players and new companies are investing in the market to cater to the growing consumer needs. Consumers are becoming more health conscious and are focusing on product labeling and transparency. Hence, manufacturers are innovating their products with various health claims to meet consumer demand. The degree of competition is high as the regional players will become a significant part of the competition. Many new start-ups are establishing various market penetration strategies to gain substantial share in the market. Small-scale players and local vendors compete based on competitive pricing.

Thus, the degree of competition is high.

### 6.4.2 BARGAINING POWER OF SUPPLIERS

The suppliers in this market are farmers (fruit growers), fruit processors/suppliers, and other raw material suppliers who supply to fruit juices manufacturing companies. Manufacturing companies have multiple options for sourcing raw materials. The raw materials include citrus fruits, sugar, and other food additives. The raw materials are selected based on certain factors, such as nutritional profile, palatability, and functional characteristics. Additionally, it does not require highly skilled labor, as it is readily available at a lower cost.

Thus, the bargaining power of the suppliers is low to moderate.

### 6.4.3 BARGAINING POWER OF BUYERS

Manufacturers must select a good distribution network and rely on the distributors and retailers to represent their brand locally. They also need to maintain a healthy relationship with the distributors and retailers as they are directly related to end consumers. The distributors specialize in transportation and maintain a healthy relationship with the retailers. Marginal profits also play a crucial role when selecting a distributor. Hence, manufacturers need to focus on marginal profits for the distributors and retailers and implement marketing and branding strategies to gain awareness among the consumers.

Thus, the bargaining power of buyers is moderate to high.

#### 6.4.4 THREAT OF SUBSTITUTES

Different types of products that can substitute fruit juices are available in the market. Additionally, fresh juices from local vendors and homemade juices pose vital substitutes. However, consumers are now more focused on hygiene factors and are switching from local vendors to packaged fruit juices.

Thus, the threat of substitutes is moderate.

#### 6.4.5 THREAT OF NEW ENTRANTS

The industry leaders capture most of the market; the local unorganized sector is also facing stiff competition. Hence, manufacturers must invest significantly to build a brand image among the consumers and retain customer loyalty. Further, potential distributors are majorly blocked by key players, thus creating a high barrier to entry.

Thus, the threat of new entrants is moderate.

### 6.5 TARIFFS AND OVERVIEW OF IMPORT PROCEDURES

This section covers the requirements for the entry of any food and beverage manufacturer in the Indian market. It also includes the legislation and regulations followed by certification required for food and beverage products.

#### 6.5.1 IMPORT TARIFF

The Indian trade policy is relatively protectionist. Import duties on most agri-food products shipped to India are relatively high, ranging between 30 and 150%, except in live plants, which do not exceed 5%. The below tables illustrate the description and tariff head details specific to HS code 22029020 for Brazil.

**TABLE 5** BRAZIL: TARIFF DETAILS SPECIFIC TO HS CODE 22029020

TARIFF ITEM	DESCRIPTION OF GOODS	UNIT	RATE OF DUTY	IMPORT POLICY
22029020	Fruit pulp or fruit juice-based drinks	LTR	30%	Free

Source: Central Board of Indirect Taxes and Customs (CBIC)

#### 6.5.2 FOOD AND BEVERAGE LEGISLATION AND REGULATIONS

##### 6.5.2.1 Import requirements/restrictions, customs procedures, and documentation

*In the first step, to import agri-food products into India, the Indian-based importer must have a license to import and sell foodstuffs. An application must be submitted to the Food Safety Commissioner of the Food Safety and Standards Authority of India (FSSAI), and it is generally processed within 60 days.*

*Once the operator receives the license, they can import “Freely importable goods,” i.e., goods that do not have import restrictions, with the necessary documents for customs. The table below represents the documents to be delivered to customs to release all imported agri-food products.*

**TABLE 6** LIST OF DOCUMENTS TO BE PRESENT TO CUSTOMS TO RELEASE ALL IMPORTED AGRI-FOOD PRODUCTS, INCLUSIVE OF FRUIT JUICE

DOCUMENTS TO PRESENT TO CUSTOMS	
Arrival Manifest	A document notifying the authorities of the arrival of goods by any means of transportation and summarizing the goods loaded therein.
Bill of Entry	An official form for the customs clearance of goods. It also contains all the information required to assess the dutiable value of a shipment.
Commercial Invoice	A document containing the details of the transaction.
Pro Forma Invoice (may be requested)	A document containing the transaction details made out before the proper invoicing and the commercial invoice.
Packing List	A document containing the shipment details and serving as a basis for the customs treatment of goods.
Certificate of Non - Preferential Origin (may be requested)	A document certifying the non-preferential origin of the goods to be imported.
Proof of Preferential Origin	A document confirming the preferential origin of the goods to be imported. It is required if preferential treatment under an FTA or arrangement is claimed.
Air Waybill or Bill of Lading	Depending on whether goods are imported by air or sea, the carrier or their agent must be prepared.
Goods and Services Tax Identification Number	A document certifying that the bearer is registered with the Central Board of Indirect Taxes and Customs (CBIC) for tax purposes.
Company Registration	A document certifying that companies are registered with the Ministry of Corporate Affairs. It is required only for company establishment.
License to import and sell foodstuff	A document proving that its bearer is licensed as a Food Business Operator and thus is authorized to import, process, and sell foodstuffs.

Source: Central Board of Indirect Taxes and Customs (CBIC), Department of Revenue, Ministry of Finance, Government of India.

Once the products arrive in India, they require a no-objection certificate (NOC) before they may be released from customs. The importers can apply for a NOC through Customs National Trade Portal (ICEGATE). The final NOC is released and notified to customs once the sample item is inspected and analyzed. However, for food items with a shorter shelf-life (less than seven days), such as fresh fruits and vegetables, may be issued a preliminary NOC before the sample analysis report from the laboratory is delivered.

### 6.5.2.2 Food safety and other food certification requirements

Laws relating to food and agricultural products imported into India are under the jurisdiction of the authorities outlined below:

- Food Safety and Standards Authority of India (FSSAI) under the Ministry of Health and Family Welfare
- The Office of Legal Metrology of the Ministry of Consumer Affairs, Food, and Public Distribution
- The Directorate General of Foreign Trade under the Ministry of Commerce and Industry
- The Department of Animal Husbandry and Dairying (DAHD) under the Ministry of Fisheries, Animal Husbandry and Dairying. There is now a separate Department of Fisheries and the Department of Agriculture and Cooperation (DAC) of the Ministry of Agriculture and Farmers Welfare.

The Food Safety and Standards Authority of India (FSSAI) is responsible for protecting public health and safety in India. The authority ensures that food consumed in India meets the highest food safety and hygiene standards, enforcing the food safety provisions.

Food safety is governed by the 2006 Food Safety and Standard Act, in India, which was formally repealed and replaced eight different pieces of legislation previously regulating food safety. The original act has subsequently been updated with guidelines. Provisions relating to imports indicate that to ensure food safety, importing the products outlined below is forbidden:

- Unsafe or misbranded or sub-standard food or food containing extraneous matter
- Articles of food for the import of which a license is required under any Act or rules or regulations.
- Articles of food in contravention of any other provision of the FSSAI Act or any other rule and regulation made under this Act.

**Additional key regulations applicable to imported food and agricultural products are outlined below.**

- The Legal Metrology Act (2009, subsequently updated several times), which establishes uniform standards of weights and measures regulating trade in weights, and other goods, which are sold and/or distributed by weight, measure, or number. This Act is enforced by the Department of Consumer Affairs under the Ministry of Consumer Affairs, Food and Public Distribution.

### 6.5.2.3 Labeling requirements

Labeling is based on the Metrology Act (responsibility of the Department of Consumer Affairs). There are some provisions in other legislation as well. A clarification has been issued specifying that, in the case of conflicting rules in different legislations, the rules of the FSSAI (under the Ministry of Health and Family Welfare) prevail, with some minor exceptions (e.g., the size of letters) for which the Metrology Act prevails.

It should be noted that new labeling and packaging regulations were introduced by FSSAI in December 2018. These are:

- Food Safety and Standards (Packaging) Regulations, 2018
- Food Safety and Standards (Labelling and Display) Regulations, 2018

There are also specific requirements for the labeling of imported foods in the Food Safety and Standards (Import) Regulations of 2017. These are included in the list below.

***Imported foodstuff products must bear labels in English or Hindi, including the following information:***

- Name and address of the manufacturer
- Name and address of the importer\*
- Licence number of the importer's licence to import and sell foodstuffs\*
- Name, trade name, or description of the product
- List of ingredients in descending order (in weight or volume)
- Nutritional information (per 100 g/100 ml or per serving)
- Information on food additives, if applicable
- Food safety and standards authority of India (FSSAI) logo\*
- Vegetarian (green) /non-vegetarian (brown) logo
- Net quantity in weight or volume
- Batch/lot/code number
- Date of manufacture or packing (mm/yy in the case of products with a shelf life of over three months; dd/mm/yy in the case of products with a shelf life of less than three months)
- "Best-before" or "use by" date (mm/yy)
- Instructions for use
- Country of origin

\*Note: This information is considered rectifiable labeling requirements. This means that such information may be added by affixing stickers to the goods after the arrival of the consignment in India.

***Vegetarian labeling requirements and sensitivities relating to some ingredients of animal origin***

- It is important to note that the classification of food as vegetarian or non-vegetarian is based on all ingredients in a product, including functional ingredients, such as gelatine and food additives. Furthermore, eggs are considered non-vegetarian. Dairy is considered vegetarian unless it includes products of animal origin, e.g., animal rennet. Care must, therefore, be taken when determining whether a product is vegetarian or non-vegetarian; and in view of the high level of vegetarianism, any product labeled as non-vegetarian will have a potential smaller market.

***Pre-packaged commodities of up to 25 kg or 25 liters are subject to specific labeling requirements in accordance with the Legal Metrology (Packaged Commodities) Rules, as outlined below:***

- Name and address of the manufacturer
- Name and address of the importer
- Common or generic name of the product
- Net quantity
- Number of commodities, if applicable
- Month and year in which the commodity was manufactured, pre-packaged, or imported
- Maximum retail sale price

### *The organic labeling*

- The Organic Food standards were established in 2017 by the FSSAI. India Organic Certification is a label bear by products made of raw materials grown through organic farming, i.e., without any chemical fertilizers, pesticides, or hormones. The FSSAI's Organic label is the 'Jaivik Bharat.' Imported organic food is not required to be re-certified in India if there is a bilateral or multilateral agreement based on the equivalence of standards. All organic food consignments must be accompanied by a Transaction Certificate issued by an Accredited Certification Body.

## 6.5.3 INDIA AND FOREIGN TRADE

The Directorate General of Foreign Trade (Ministry of Commerce and Industry) controls India's foreign trade policy. India participates in several multilateral agreements and has been a member of GATT since 1948 and a member of the WTO since 1995.

### 6.5.3.1 Key trade agreements, present and future

India is part of several multilateral and regional organizations and forums for trade, including the GATT and WTO. On top of that, India has concluded several regional and bilateral Free Trade Agreements (FTAs) and Comprehensive Economic Partnership Agreements (CEPAs) involving African, Asian, and Latin American countries.

Benefitting from a reduction in tariff and non-tariff barriers, India's FTA partners are advantaged in terms of exporting to the country. In its FTAs, India has been cutting import duties on more than 90% of agri-food products. This notwithstanding, in its FTAs, India has used the negative list (i.e., a list of products excluded from the agreement) quite extensively for agri-food products.

**TABLE 7** TRADE AGREEMENTS CONCLUDED BY INDIA

PARTNER	TYPE OF AGREEMENT	ENTRY INTO FORCE
Brazil	Preferential Trade Agreement	2005

Source: Agra CEAS based on Indian Trade Portal

## 6.6 LOGISTICAL SERVICES AND TRANSPORTATION INFRASTRUCTURE

The Indian distribution network predominantly relies on rail and road systems, accounting for approximately 87% of the total freight traffic, with limited traffic carriers by water and air transport. The Indian government has taken special attention to increasing investment over the years.

### 6.6.1 SHIPPING

Water transport is particularly important for imported goods, as 95% of India's trade volume is moved by sea. Along the coast and islands, there are 13 major ports and 200 smaller ports. The largest ones are the Mumbai port located in the Gulf of Kutch and the Chennai port in the Bay of Bengal. Although port traffic has been on a continuous rise, port capacity remains stable, with the gap between growth in traffic and growth in port capacity widening.

### 6.6.2 AIR FREIGHT

The Indian airport system consists of 23 international airports of different sizes. Delhi's Indira Gandhi and Mumbai's Chhatrapati Shivaji International Airports are particularly important, as they account for most air freight traffic.

### 6.6.3 RAIL FREIGHT

Railway services were introduced in India in 1853, with the first line between Mumbai and Thane. Today, the Indian Railways (IR) is the third major railway network in the world, with 7500 railway stations and nearly 65000 km of track, on which over 2.8 million tonnes of freight traffic are transported daily. Investment in the railway sector has been increasing over the years. Notably, a key ongoing development is the Dedicated Freight Corridors (DFCs), aimed at increasing the rail freight transportation capacity. The major railway network includes the most important broad-gauge lines.

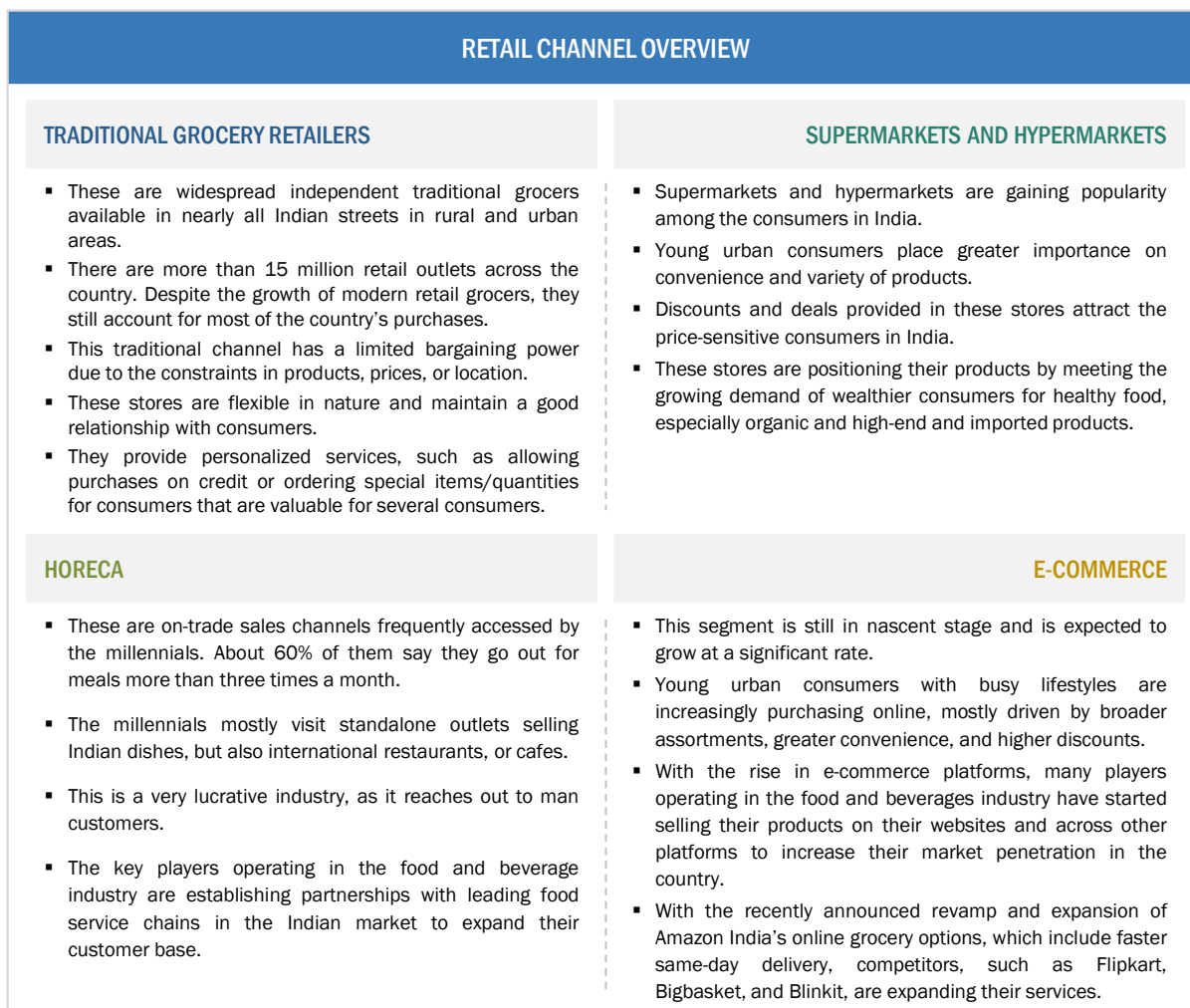
### 6.6.4 ROAD FREIGHT

With nearly 5 million km in road length, the road system is one of India's most developed transport systems. On top of that, India's road network is the second largest globally and grew by 26% from 2012-2017. The Indian Road network can be divided into three main categories: (1) National highways, (2) Public roads, and (3) Rural roads. Road infrastructure has been a priority for the Indian government, as demonstrated by the National Highways Authority of India (NHAI) plan to expand the road network by 50 000 kilometers by 2022 with an investment of over EUR 220 billion.

## 6.7 DISTRIBUTION

Food and beverage product distribution is mainly done through traditional grocery retailers named "Kirana." These retail outlets are spread across the country. Products are delivered to them with the help of distributors or sub-distributors. However, supermarkets and hypermarkets and modern retail are gaining ground in India. This modern retail channel and HORECA segment are the important channels used for the distribution of imported products, as they have the right infrastructure for storing and selling these products.

**FIGURE 22** INDIAN DISTRIBUTION CHANNEL



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis



## 6.8 BUSINESS ENVIRONMENT

India's business environment faces several challenges, as outlined below:

- A burdensome regulatory environment
- Potential for challenges when dealing with the public sector
- Historical complications for trading across state borders, though the introduction of the Goods and Service Tax and related provisions have greatly facilitated this; however, for alcoholic beverages, barriers across state borders remain.

A foreign exporter planning to export to India should be aware of the dynamic regulatory situation, partly as a result of the ongoing work of the Food Safety and Standards Authority of India, which continues its work to introduce new standards following its establishment in 2006. While no major evolutions to the regulatory landscape seem likely over the short-to-medium term, smaller evolutions are likely to continue.

## 6.9 TRADE DATA: FRUIT JUICES

The below tables illustrate the import of fruit juices across India. This data indicates a list of supplying markets for juices imported by India, a list of fruit juices imported by India, and the top importers for current and historical years.

### 6.9.1 IMPORT DATA: LIST OF SUPPLYING MARKETS FOR PRODUCTS IMPORTED BY INDIA

**TABLE 8** TOP 10 IMPORTERS FOR HS CODE: 2009 (FRUIT JUICES, INCL. GRAPE MUST, AND VEGETABLE JUICES, UNFERMENTED, NOT CONTAINING ADDED SPIRIT) BY COUNTRY, 2017-2021, VOLUME (TON)

Country	2017	2018	2019	2020	2021
China	7,970	10,032	9,574	9,773	10,317
Israel	1,368	2,487	2,510	3,002	4,756
Turkey	852	244	575	722	3,146
Brazil	1,391	1,469	1,212	443	2,682
Iran	184	-	235	703	2,564
US	3,931	2,314	1,906	1,500	1,868
Netherlands	91	2,677	1,215	648	1,627
Thailand	1,794	1,525	971	490	934
Spain	1,175	925	1,386	933	926
Egypt	-	718	817	144	718

Note: HS Code: 2009 - Fruit juices, incl. grape and vegetable juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter

Source: Trade Map

**TABLE 9 LIST OF FRUIT JUICES IMPORTED BY INDIA, 2016-2020, VOLUME (TON)**

HS CODE	PRODUCT LABEL	2016	2017	2018	2019	2020
'200911	Frozen orange juice, unfermented, whether or not containing added sugar or other sweetening ...	4,712	4,563	5,945	5,261	3,539
'200989	Juice of fruit or vegetables, unfermented, whether or not containing added sugar or other sweetening ...	5,856	7,847	8,705	7,166	2,384
'200919	Orange juice, unfermented, whether or not containing added sugar or other sweetening matter ...	325	912	1,687	1,070	453
'200990	Mixtures of fruit juices, incl. grape must, and vegetable juices, unfermented, whether or not ...	2,290	339	361	302	328
'200939	Single citrus fruit juice, unfermented, Brix value > 20 at 20 °C, whether or not containing ...	2,317	3,367	1,132	656	321
'200969	Grape juice, incl. grape must, unfermented, Brix value > 30 at 20 °C, whether or not containing ...	809	511	322	357	105
'200912	Orange juice, unfermented, Brix value <= 20 at 20 °C, whether or not containing added sugar ...	195	100	197	112	47
'200961	Grape juice, incl. grape must, unfermented, Brix value <= 30 at 20 °C, whether or not containing ...	6	11	1	2	19
'200921	Grapefruit juice, unfermented, Brix value <= 20 at 20 °C, whether or not containing added sugar ...	-	-	68	27	14
'200931	Single citrus fruit juice, unfermented, Brix value <= 20 at 20 °C, whether or not containing ...	1	2	2	-	5
'200929	Grapefruit juice, unfermented, Brix value > 20 at 20 °C, whether or not containing added sugar ...	355	124	26	26	-

Source: Trade Map

**TABLE 10** KEY IMPORTERS OF HS CODE 200911 (JUICES, ORANGE, FROZEN, UNFERMENTED [NOT CONTAINING ADDED SPIRIT] WHETHER OR NOT CONTAINING ADDED SUGAR OR OTHER SWEETENING MATTER), FOR INDIA, 2019-2021

2019		2020		2021	
COUNTRY	IMPORT (TON)	COUNTRY	IMPORT (TON)	COUNTRY	IMPORT (TON)
US	2,072.0	US	1,599.1	Brazil	2,933.5
Brazil	1,335.5	South Africa	701.9	US	1,994.4
South Africa	913.4	Israel	602.2	Israel	1,160.9
Egypt	900.7	Brazil	487.9	Egypt	765.3
Israel	392.4	Spain	242.0	Spain	291.6
Pakistan	100.7	Egypt	158.3	Belgium	253.0
Belgium	43.7	Belgium	109.4	South Africa	153.2
China	39.7	France	0.6	Netherlands	72.9
France	1.2			UK	0.6
				France	0.3

Source: UN Comtrade

**TABLE 11** KEY IMPORTERS OF HS CODE 200912 (JUICES, ORANGE, NOT FROZEN, OF A BRIX VALUE, NOT EXCEEDING 20, UNFERMENTED, NOT CONTAINING ADDED SPIRIT, WHETHER OR NOT CONTAINING ADDED SUGAR OR OTHER SWEETENING MATTER) FOR INDIA, 2019-2021

2019		2020		2021	
COUNTRY	IMPORT (TON)	COUNTRY	IMPORT (TON)	COUNTRY	IMPORT (TON)
Bhutan	60.4	Thailand	26.2	Thailand	36.2
Malaysia	29.0	Italy	11.4	Spain	12.3
Italy	22.6	Malaysia	8.1	Malaysia	9.5
Germany	11.3	Germany	5.3	France	5.0
Canada	0.5	Singapore	0.4	Italy	2.7
				Belgium	2.0
				UK	1.7

Source: UN Comtrade

**TABLE 12** KEY IMPORTERS OF HS CODE 200919 (JUICES, ORANGE, NOT FROZEN, OF A BRIX VALUE EXCEEDING 20, UNFERMENTED, NOT CONTAINING ADDED SPIRIT, WHETHER OR NOT CONTAINING ADDED SUGAR OR OTHER SWEETENING MATTER) FOR INDIA, 2019-2021

2019		2020		2021	
COUNTRY	IMPORT (TON)	COUNTRY	IMPORT (TON)	COUNTRY	IMPORT (TON)
Spain	519.8	Spain	266.7	Spain	364.0
Bhutan	464.1	Israel	213.6	Israel	337.9
Israel	51.3	UK	5.0	Egypt	26.2
Greece	50.4	South Africa	4.9	Germany	4.8
Pakistan	28.0	Germany	2.9	Canada	1.4
Germany	20.4	Thailand	2.1	South Africa	0.4
UK	16.8	Japan	1.9	China	0.2
South Africa	7.4	Netherlands	1.7		
Japan	6.8				
Canada	6.6				

Source: UN Comtrade

## 6.10 PER CAPITA SOFT DRINKS CONSUMPTION IN INDIA

**TABLE 13** PER CAPITA SOFT DRINKS CONSUMPTION, BY PRODUCT TYPE, 2020 (LITERS)

PRODUCT TYPE	PER CAPITA CONSUMPTION (LITERS) 2020
Packaged drinking water	11.57
Bulk/HOD water	5.58
Carbonates	4.50
Still drinks	1.46
Fruit powders	0.43
Squash/syrups	0.20
Nectars	0.19
Sport drinks	0.15
Juice	0.09
Enhanced water	0.08
Energy drinks	0.02
Flavored water	0.02

Iced RTD /tea drinks	0.02
Iced RTD /coffee drinks	0.01

Note: The population of India considered for the year 2020 was 1,380 million, taken from the World Bank database

Source: DRHP, Company, MOFSL

## 6.11 CASE STUDIES

**TABLE 14 ITC LIMITED: STRATEGIC PARTNERSHIPS**

Problem Statement	Consumers looking for healthy beverages in the HORECA segment
Solutions Offered	ITC Limited (India), in November 2021, entered into a strategic partnership with McDonald's (US) to include its B-Natural fruit juices as part of their happy meal in all McDonald's restaurants across West and South India.
Outcome	The strategic partnership provided more brand visibility to the B-Natural brand and helped it to expand its customer base in the country. Establishing partnerships with leading food service chains and restaurants allowed the companies to expand their customer base and aided them in customer acquisition in terms of quality, flavor, and taste of the product.

Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

**TABLE 15 DABUR INDIA LIMITED: LOW-CALORIE PRODUCTS**

Problem Statement	Consumer's rising concern regarding low-calorie fruit juices with unique packaging options
Solutions Offered	Tetra Pak (Switzerland) and Dabur India Limited (India), in August 2020, entered into a strategic partnership and launched a low-calorie orange juice range under the 'Real Activ' brand in a new and unique packaging material effect.
Outcome	This helped the companies cater to the rising demand from health-conscious consumers and strengthened their product portfolio.

Source: Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis

## 7 CITRUS FRUIT JUICES MARKET, BY TYPE

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### KEY FINDINGS

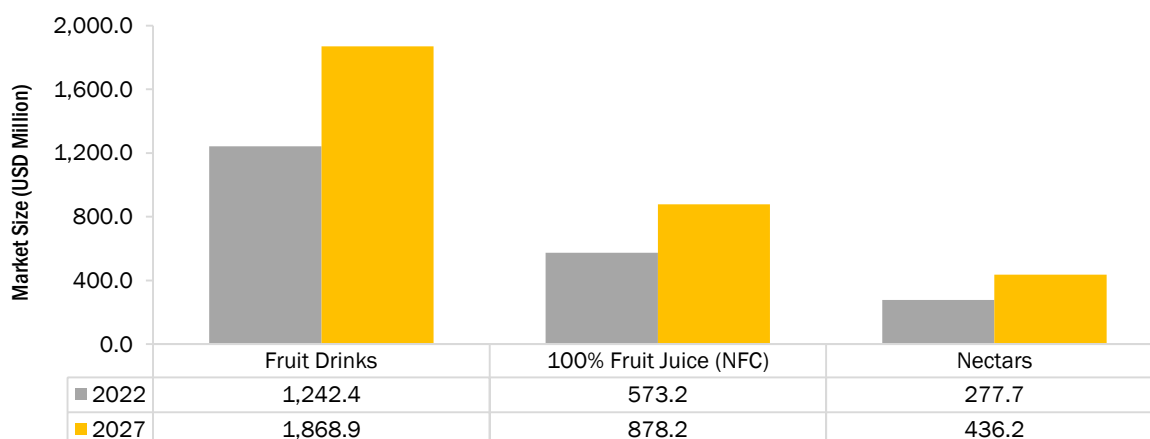
- The fruit drinks segment dominated the market in 2021, accounting for a 59.5% share in terms of value. It is expected to witness significant demand owing to their low cost and availability.
- The 100% juices (NFC) segment accounted for the second-largest share in the citrus fruit juices market, with a value of USD 529.3 million, in 2021. It is projected to grow at a CAGR of 8.9% between 2022 and 2027 in terms of value.
- The rising demand from the growing health-conscious consumers is expected to drive the demand for citrus fruit juices.

## 7.1 INTRODUCTION

India's citrus fruit juices market has been experiencing significant demand, owing to the rising health awareness among Indian consumers. The market is highly competitive, with a strong presence of global and multinational players and many small-scale unorganized players operating in the industry. The different citrus fruit juices available in the market can be categorized into three types: fruit drinks, 100% juice (NFC), and nectars. Fruit drinks and nectars are categorized under reconstituted fruit juices made from fruit juice concentrates, while 100% fruit juices are pure fruit juices and do not contain any added colorings, preservatives, sugar, or any other additives.

Due to the difference in production methodologies, the nutritional content varies between types of juices. For instance, essential enzymes are required for adequate food metabolism and immune system response. They get destroyed during the heating process and are reconstitution in reconstituted fruit juices. Therefore, 100% juices are considered a healthier fruit juice option. The types of citrus fruit juices also differ significantly in aroma and texture. There has been an increasing shift toward consuming citrus fruit juices from carbonated beverages and other soft drinks because of their perceived health benefits, significantly expanding their customer base in recent years. Reconstituted citrus fruit juices and 100% juices products have been experiencing significant demand after the COVID-19 pandemic because of their immunity-boosting properties and health benefits. These types of citrus fruit juices can also be mixed with other fruit juices to enhance their taste and flavor offerings, which increases their applicability in the industry.

**FIGURE 23** CITRUS FRUIT JUICES MARKET, BY TYPE, 2022 VS. 2027 (VALUE)



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

**TABLE 16** CITRUS FRUIT JUICES MARKET, BY TYPE, 2020–2027 (USD MILLION)

Type	2020	2021	2022	2023	2024	2025	2026	2027	CAGR (2022–2027)
Fruit Drinks	984.7	1,151.3	1,242.4	1,343.2	1,454.8	1,578.6	1,716.1	1,868.9	8.5%
100% Fruit Juice (NFC)	452.7	529.3	573.2	622.0	676.1	736.3	803.4	878.2	8.9%
Nectars	214.8	255.2	277.7	302.8	330.9	362.1	397.1	436.2	9.4%
<b>Total</b>	<b>1,652.2</b>	<b>1,935.8</b>	<b>2,093.4</b>	<b>2,268.0</b>	<b>2,461.8</b>	<b>2,677.1</b>	<b>2,916.5</b>	<b>3,183.3</b>	<b>8.7%</b>

Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

**TABLE 17** CITRUS FRUIT JUICES MARKET, BY TYPE, 2020–2027 (MILLION LITERS)

Type	2020	2021	2022	2023	2024	2025	2026	2027	CAGR (2022–2027)
Fruit Drinks	496.9	578.9	621.5	668.6	720.5	777.9	841.5	911.8	8.0%
100% Fruit Juice (NFC)	228.4	266.1	286.8	309.6	334.9	362.9	393.9	428.4	8.4%
Nectars	108.4	128.3	138.9	150.7	163.9	178.4	194.7	212.8	8.9%
<b>Total</b>	<b>833.7</b>	<b>973.3</b>	<b>1,047.3</b>	<b>1,129.0</b>	<b>1,219.3</b>	<b>1,319.3</b>	<b>1,430.1</b>	<b>1,553.1</b>	<b>8.2%</b>

Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

## 7.2 RECONSTITUTED FRUIT JUICES

### 7.2.1 COST-EFFECTIVENESS AND EASY AVAILABILITY

Reconstituted fruit juices are made from fruit juice concentrates produced after evaporating around 80% of the water content from the juice after extraction. The same quantity of water is added to the concentrate before distributing it through various distribution channels. Companies reconstitute fruit juices as it makes the product easier and cheaper to store and transport. This allows the companies to keep their transportation and storage costs much lower than 100% fruit juices.

These products are cost-efficient and easily available in supermarkets and convenience stores in packaged form. Thus, they contribute significantly to their market growth in the industry. Reconstituting the fruit juices also damages some of the essential nutrients and enzymes found in the fruit. Moreover, they also contain added sugar and some chemical additives for the shelf-life extension for compensating some of the nutrients lost during the evaporation process. This has garnered negative perception toward these types of fruit juices, especially from the label-conscious consumers who demonstrate a higher level of awareness of personal health.

### 7.2.2 FRUIT DRINKS

Fruit drinks are a type of reconstituted fruit juices that have a higher content of water compared to 100% juices. They have 0-24% fruit pulp and contain more sugar and preservatives for shelf-life extension and added coloring and flavor than 100% fruit juices. This allows efficient storage options, cost reduction, and bulk production.

Due to the added sugar content, flavorings, preservatives, and low fruit content, fruit drinks have garnered some negative perceptions over the years, particularly from the health-conscious consumers who prefer citrus fruit juices for their perceived health benefits. This is expected to generate restrain for the market growth.

### 7.2.3 NECTARS

Nectars are reconstituted citrus fruit juices with a fruit pulp content, which is higher than fruit drinks but lower than 100% juices. The fruit pulp content of nectars is in the range of 24-99%. Nectars are diluted fruit juices with added water, sugar, additives, and preservatives. These are much denser than fruit drinks and much more acidic, which needs to be diluted by adding water. This enables them to achieve consistency in drinking and makes them palatable. Nectars are much healthier compared to fruit drinks. However, their added sugar content and additives can contribute to excess calories and other health issues if their consumption is unregulated.



## 7.3 100% FRUIT JUICES (NFC)

### 7.3.1 RISING DEMAND FROM HEALTH-CONSCIOUS CONSUMERS

100% juices are made from pure fruit juices and not from concentrates, without the usage of any colorings, additives, or preservatives. They have 100% fruit pulp content and have the highest fruit content among all other types of citrus fruit juices. 100% juices do not involve any processing from concentrates and are produced by juicing the fruit directly without any process of water removal or reconstitution. 100% juices only have the natural sugar content of fruits and no added sugar content. These types of juices have been witnessing significant demand from the rising number of health-conscious consumers in the industry who regularly consume fruit juices for their health benefits and immunity-boosting properties. The only drawback associated with 100% juices is that due to the lack of preservatives, their shelf life is much shorter compared to reconstituted fruit juices. Due to this, they cannot be stored for longer. As the awareness regarding personal health continues to rise among the consumers in India, it will continue to propel the growth of 100% juices due to their natural ingredients and health benefits.

## 8 CITRUS FRUIT JUICES MARKET, BY FRUIT TYPE

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### KEY FINDINGS

- The orange segment dominated the Indian citrus fruit juices market, accounting for a 48% share in terms of value, in 2021. It is expected to witness significant demand owing to its many health benefits.
- The mixes and others segment is projected to grow at the highest CAGR of 9.1% between 2020 and 2027 in terms of value, owing to the multi-functionality offered by the fruit mixes.
- The rich taste and flavor profiles of grape juice and the health benefits offered are expected to drive its demand during the forecast period.

## 8.1 INTRODUCTION

The Indian citrus fruit juices market comprises orange, grapes, lime, lemon, and mixes and others. These fruits have a high concentration of citric acid, which gives them a characteristic sour taste. Citric acid, or citrate, is a type of organic acid present in all fruits. However, their concentration is particularly high in citrus fruits.

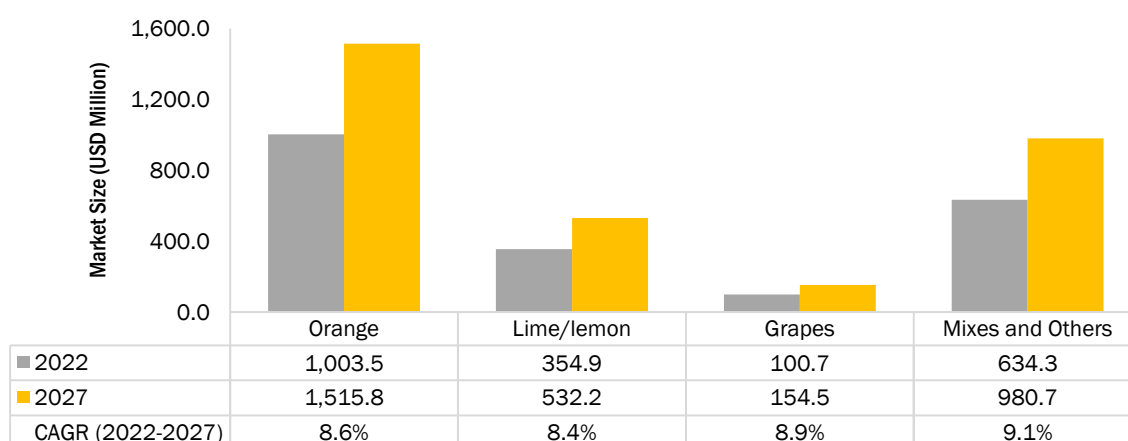
Citrus fruits are grown in every state in India. However, their production is particularly high in Andhra Pradesh, Telangana, Maharashtra, Assam, and Karnataka. Citrus fruit juices offer many health benefits and contain essential phytochemicals, such as flavonoids, amino acids, triterpenes, phenolic acids, and carotenoids, which drive wide consumer acceptability, especially from modern health-conscious consumers. They also offer a rich source of other essential nutrients, such as vitamins, fibers, potassium, folate, and calories, and are effective against a wide range of health issues, such as kidney stones, cancer, cardiovascular disease, and other cognitive issues.

The Indian citrus fruit juices market is highly competitive, with various key and small-scale organized and unorganized players operating in the industry. Their popularity and demand have also heightened in recent years owing to an increase in health-conscious consumers shifting to citrus fruit juices from other beverages and soft drinks. An official representative of Drunken Monkey (India) in December 2020 stated that Indian people have started giving significant importance to health in the category of drinks, which drives the demand for packaged fruit juices. Furthermore, fruit-rich products will continue to experience healthy demand from consumers, which will present significant business opportunities for organic juices and cold-pressed juices.

**TABLE 18** INDIA: CITRUS FRUIT PRODUCTION, BY FRUIT TYPE, 2019–2022 (KT)

Fruit Type	2019-20	2020-21	2021-22
Orange	11,219.7	11,253.9	11,200.4
Lime/lemon	4,065.2	3,912.2	3,877.3
Grapes	3,507.7	3,702.0	3,847.8
<b>Total</b>	<b>18,792.6</b>	<b>18,868.1</b>	<b>18,925.5</b>

Source: Agricultural & Processed Food Products Export Development Authority (Ministry of Commerce & Industry, Govt. of India)

**FIGURE 24** CITRUS FRUIT JUICES MARKET, BY FRUIT TYPE, 2022 VS. 2027 (VALUE)

Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

**TABLE 19** CITRUS FRUIT JUICES MARKET, BY FRUIT TYPE, 2020–2027 (USD MILLION)

Fruit Type	2020	2021	2022	2023	2024	2025	2026	2027	CAGR (2022-2027)
Orange	794.7	929.2	1,003.5	1,085.8	1,177.0	1,278.2	1,390.7	1,515.8	8.6%
Lime/lemon	279.2	329.1	354.9	383.4	415.0	450.1	489.0	532.2	8.4%
Grapes	77.7	92.9	100.7	109.3	118.8	129.5	141.3	154.5	8.9%
Mixes and Others	500.6	584.6	634.3	689.5	750.9	819.3	895.6	980.7	9.1%
<b>Total</b>	<b>1,652.2</b>	<b>1,935.8</b>	<b>2,093.4</b>	<b>2,268.0</b>	<b>2,461.8</b>	<b>2,677.1</b>	<b>2,916.5</b>	<b>3,183.3</b>	<b>8.7%</b>

Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

**TABLE 20** CITRUS FRUIT JUICES MARKET, BY FRUIT TYPE, 2020–2027 (MILLION LITERS)

Fruit Type	2020	2021	2022	2023	2024	2025	2026	2027	CAGR (2022-2027)
Orange	401.0	467.2	502.0	540.5	582.9	629.9	681.9	739.5	8.1%
Lime/lemon	140.9	165.5	177.5	190.9	205.6	221.8	239.8	259.7	7.9%
Grapes	39.2	46.7	50.4	54.4	58.9	63.8	69.3	75.4	8.4%
Mixes and Others	252.6	293.9	317.3	343.2	371.9	403.8	439.1	478.5	8.6%
<b>Total</b>	<b>833.7</b>	<b>973.3</b>	<b>1,047.3</b>	<b>1,129.0</b>	<b>1,219.3</b>	<b>1,319.3</b>	<b>1,430.1</b>	<b>1,553.1</b>	<b>8.2%</b>

Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

## 8.2 ORANGE

### 8.2.1 HEALTH BENEFITS ASSOCIATED WITH ORANGE JUICE

Oranges are cultivated in Punjab, Madhya Pradesh, Andhra Pradesh, Maharashtra, Rajasthan, and Karnataka. This enables manufacturers and producers to cater to the country's widespread demand for orange juices. Orange juice is very popular, owing to its health benefits and affordability. It is a rich source of vitamin A, vitamin C, calcium, iron, fiber, and folate, which supports the immune system and reduces the risk of congenital disability and kidney stones. Orange juice enhances metabolism and boosts strength. Due to all these health issues, more Indians have started including orange juice as part of their breakfast meals. This has driven many key industry players to launch new and innovative products. For instance, Tetra Pak (Switzerland) and Dabur India Limited (India), in August 2020, entered into a strategic partnership and launched a low-calorie orange juice range under the 'Real Activ' brand in a new and unique packaging material effect. An official company representative said that this strategic initiative was undertaken to cater to the rising demand from health-conscious consumers.

**TABLE 21** INDIA: TOP TEN PRODUCERS OF MANDARIN (M.ORANG, KINNOW, ORANGE), BY STATE, 2021–2022 (KT)

SR NO.	STATES	2021-22
1	Madhya Pradesh	2,270.7
2	Punjab	1,297.6
3	Maharashtra	1,088.2
4	Rajasthan	720.6
5	Haryana	663.8
6	Assam	230.7
7	Karnataka	204.5
8	Arunachal Pradesh	74.6
9	Mizoram	59.7
10	Manipur	52.4

Source: Agricultural & Processed Food Products Export Development Authority (Ministry of Commerce & Industry, Govt. of India)

**TABLE 22** INDIA: TOP TEN PRODUCERS OF SWEET ORANGE (MALTA, MOSAMBI), BY STATE, 2021-2022 (KT)

SR NO.	STATES	2021-22
1	Andhra Pradesh	2,976.0
2	Maharashtra	567.7
3	Telangana	563.8
4	Madhya Pradesh	100.7
5	Punjab	26.6
6	Karnataka	16.4
7	Jammu & Kashmir	6.8
8	Mizoram	5.4
9	Bihar	5.2
10	Rajasthan	5.0

Source: Agricultural & Processed Food Products Export Development Authority (Ministry of Commerce & Industry, Govt. of India)

## 8.3 LIME/LEMON

### 8.3.1 HEALTH BENEFITS OF LEMON DRINK DRIVING SALES

Lemon and lime juice and drinks are highly popular in India, owing to their rich and refreshing flavor. They boost digestion and prevent flatulence. They're a rich source of Vitamin C and possess excellent hydration properties that are effective against many health issues, such as obesity, diabetes, cavities, and other diseases related to the heart, kidney, and liver. All this leads to their high demand, which is driving their market growth.

India is one of the leading producers of lemons and lime. Andhra Pradesh is the largest producer of lemon. It is followed by Gujarat, Maharashtra, Karnataka, and Madhya Pradesh, where the temperature conditions are warm, moderately dry, and have a significant moisture content. Sweet lemon juice, also known as 'mosambi juice,' is another variation of lemon juice highly popular in India. It improves immunity, enhances digestion, and has rich antioxidant and antibacterial properties beneficial for the eyes, skin, and hair. Sweet lemon juice has a sweeter taste than lime and lemons and is less acidic.

**TABLE 23** INDIA: TOP TEN PRODUCERS OF LIME/LEMON, BY STATE, 2021–2022 (KT)

SR NO.	STATES	2021-22
1	Andhra Pradesh	764.6
2	Gujarat	689.7
3	Maharashtra	381.6
4	Karnataka	375.1
5	Madhya Pradesh	333.7
6	Odisha	317.4
7	Assam	173.4
8	Telangana	165.9
9	Bihar	126.7
10	West Bengal	104.6

Source: Agricultural & Processed Food Products Export Development Authority (Ministry of Commerce & Industry, Govt. of India)

## 8.4 GRAPES

### 8.4.1 RICH TASTE AND FLAVOR COUPLED WITH HEALTH BENEFITS

Grape juice is one of India's most popular citrus fruit juices. It has a strong taste and flavor. In addition, it reduces the risk of blood clots, reduces low-density lipoprotein (LDL) cholesterol, prevents damage to blood vessels in the heart, and helps maintain healthy blood pressure. It is also a rich source of antioxidants. Dark red and purple grapes have more antioxidants than white or green grapes.

In India, grapefruits are cultivated across Maharashtra, Karnataka, Tamil Nadu, and Andhra Pradesh, among others. According to the Agricultural and Processed Food Products Export Development Authority (APEDA), Maharashtra is the leading grape-producing state in India, accounting for more than 70% of total production. In India, grape cultivation occupies 123 thousand hectares of land, which is 2.01% of the total cultivation area.

Grapefruit juice contains lycopene and naringenin, which are effective against cancer. Lycopene acts on the cancer-causing free radicals. While naringenin, an antioxidant, is highly effective in repairing the damaged DNA in prostate cancer cells and reducing cholesterol levels. These significant health benefits have contributed to the rising demand for grape juice.

**TABLE 24** INDIA: TOP TEN PRODUCERS OF GRAPES, BY STATE, 2021–2022 (KT)

SR NO.	STATES	2021-22
1	Maharashtra	2,717.9
2	Karnataka	941.8
3	Tamil Nadu	55.1
4	Andhra Pradesh	51.6
5	Madhya Pradesh	39.1
6	Mizoram	19.1
7	Telangana	11.0
8	Punjab	7.7
9	Jammu & Kashmir	1.7
10	Haryana	0.3

Source: Agricultural & Processed Food Products Export Development Authority (Ministry of Commerce & Industry, Govt. of India)

## 8.5 MIXES AND OTHERS

### 8.5.1 MULTI-FUNCTIONALITY OF MIXED CITRUS FRUIT JUICES CONTRIBUTING TO THEIR HIGH DEMAND

Mixes or blends of different citrus fruits with other fruits are also witnessing significant demand in the citrus fruit juice industry. Citrus fruit juices, such as lemon, lime, grape, and orange juices, are widely used with other fruits, which enhances the taste and flavor offerings. Mixed citrus fruit juices are highly popular among consumers because of their potential health benefits and rich flavor offerings. Many players are manufacturing various types of blends and mixes. For example, Del Monte Foods, Inc (India) launched its ACE mixed fruit juice range containing apples, oranges, guavas, and mangoes. This would cater to the rising demand from health-conscious consumers in the industry. Similarly, Minute Maid, a brand of The Coca-Cola Company (US), launched Minute Maid Fruit Punch in Santra Mosambi, containing orange and sweet lemon.

Indian gooseberry, also known as 'Amla,' is another popular citrus fruit that has gained significant traction in the market owing to its rich health benefits. Amla is a rich source of vitamin C. It boosts immunity and is loaded with Vitamin A, polyphenols, alkaloids, and flavonoids, which are beneficial in improving liver function, secreting insulin, boosting gut health, and promoting hair health. It is also effective against chronic diseases, such as diabetes, hypertension, obesity, and other skin conditions. Amla juice will continue to experience significant demand during the forecast period as many consumers shift their focus to health and wellness.



## 9 CITRUS FRUIT JUICES MARKET, BY PACK SIZE

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### KEY FINDINGS

- The 0-200 ml segment dominated the market in 2021, accounting for a 52.6% market share. It is projected to account for USD 1687.3 million by 2027, owing to its significant demand from consumers because of its ease of portability and affordable costs.
- The 501-1000 ml segment is projected to grow at a CAGR of 8.7%, in terms of value, owing to the increasing trend of monthly shopping in India.
- The extended shelf life and regular consumption of packaged citrus fruit juices contribute significantly to their market growth. As a result, the demand for larger pack sizes, such as 501-1000 ml and above 1000 ml, is increasing.

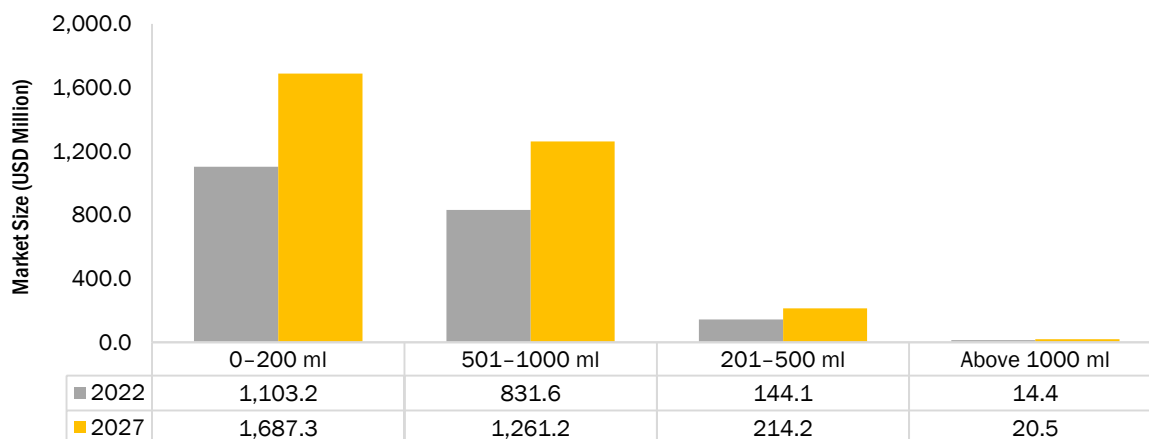
## 9.1 INTRODUCTION

The Indian citrus fruit juices market is highly diversified and comprises different varieties of fruit juices. These juices are offered in various packs to accommodate customers' preferences. Some want to preserve the juices for long, while others prefer to consume them in one go. To facilitate these dynamics, juices are offered in bottles, cans, aseptic cartons, glass bottles, and stand-up pouches of various sizes. Some of the sizes covered in this report are 0-200 ml, 201-500 ml, 500-1000 ml, and above 1000 ml.

Customer preferences influence the choice of the pack size. Generally, citrus fruit juices are best when consumed fresh. Therefore, the pack size of 0-200 ml is found to be more popular, lucrative, and portable. A small juice pack can be immediately opened and consumed fresh. Such out-of-home consumption is difficult with larger packs.

The increasing purchasing power of consumers is another factor influencing the consumers' decision to buy new, attractive, and expensive packs. The alluring modern retail displays, easy access to various distribution channels, and introduction of newer flavors by the companies operating in the industry have also contributed to this change.

**FIGURE 25** CITRUS FRUIT JUICES MARKET, BY PACK SIZE, 2022 VS. 2027 (VALUE)



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

**TABLE 25** CITRUS FRUIT JUICES MARKET, BY PACK SIZE, 2020–2027 (USD MILLION)

Pack Size	2020	2021	2022	2023	2024	2025	2026	2027	CAGR (2022–2027)
0-200 ml	871.8	1,018.9	1,103.2	1,196.7	1,300.4	1,415.8	1,544.2	1,687.3	8.9%
201-500 ml	112.6	133.9	144.1	155.4	168.0	181.8	197.2	214.2	8.2%
501-1000 ml	657.8	769.4	831.6	900.5	976.9	1,061.8	1,156.1	1,261.2	8.7%
Above 1000 ml	10.0	13.5	14.4	15.4	16.5	17.7	19.1	20.5	7.3%
<b>Total</b>	<b>1,652.2</b>	<b>1,935.8</b>	<b>2,093.4</b>	<b>2,268.0</b>	<b>2,461.8</b>	<b>2,677.1</b>	<b>2,916.5</b>	<b>3,183.3</b>	<b>8.7%</b>

Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

**TABLE 26** CITRUS FRUIT JUICES MARKET, BY PACK SIZE, 2020–2027 (MILLION LITERS)

Pack Size	2020	2021	2022	2023	2024	2025	2026	2027	CAGR (2022–2027)
0-200 ml	429.4	499.3	537.9	580.6	627.8	680.0	738.0	802.4	8.3%
201-500 ml	65.9	77.9	83.3	89.3	95.9	103.2	111.3	120.2	7.6%
501-1000 ml	327.7	381.5	410.5	442.5	478.0	517.1	560.6	608.8	8.2%
Above 1000 ml	10.8	14.6	15.5	16.5	17.6	18.9	20.2	21.7	6.9%
<b>Total</b>	<b>833.7</b>	<b>973.3</b>	<b>1,047.3</b>	<b>1,129.0</b>	<b>1,219.3</b>	<b>1,319.3</b>	<b>1,430.1</b>	<b>1,553.1</b>	<b>8.2%</b>

Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

## 9.2 0-200 ML

### 9.2.1 EASE OF PORTABILITY AND AFFORDABLE COSTS

0-200 ml packs of citrus fruit juices are popular in the Indian citrus fruit juice industry, owing to their convenient sizes, which makes them more portable and commutable. The 0-200 ml segment accounted for a 51.3% market share in the Indian citrus fruit juices market in 2021. Smaller packs facilitate out-of-home consumption for consumers. They are cheaper and more affordable than larger pack sizes, which significantly contributes to their rising demand in the industry. Smaller packs allow easier transportation and lower shipping charges, due to which they are easily available in convenience stores and other supermarkets and hypermarkets.

Smaller packs enable customers to test a product and upgrade to a larger pack if they should like the quality, taste, and flavor. An official representative of Blink Commerce Private Limited (India), a popular grocery delivery chain in India, stated in July 2019 that the demand for products in small packs is rising significantly across supermarkets and hypermarkets. All these factors are expected to boost the growth of the 0-200 ml segment in the years to come.

## 9.3 201-500 ML

### 9.3.1 STRONG DEMAND FROM HEALTH-CONSCIOUS CONSUMERS FOR CONSUMPTION OF CITRUS FRUIT JUICES IN LARGER QUANTITIES

The 201-500 ml pack size appeals to consumers who have already developed an affinity toward a certain citrus fruit juice product. They are willing to purchase the product in large quantities but still want to consume it fresh without storing it for a longer period. 201-500 ml packs contain large quantities of fruit juices while retaining the advantages of being portable, affordable, and facilitating on-the-go consumption.

The increased demand for citrus fruit juices in recent years, especially from health-conscious consumers, has created significant demand for 201-500 ml packs. These packs are presentable and often served in meetings, conferences, and other smaller events due to their convenient size and appearance. They are witnessing high demand on e-commerce channels from the growing health-conscious class.

## 9.4 501-1000 ML

### 9.4.1 EXTENDED SHELF LIFE, COST EFFICIENCY, AND RISE IN TREND OF MONTHLY SHOPPING

Offerings in 500-1000 ml packs are large in quantity. They are mostly meant to be preserved for future use. Larger packs are priced smartly by companies, which attracts consumers and delivers better value for them. Citrus fruit juices in these packs are promoted efficiently by citrus fruit juice companies across online e-commerce channels and supermarkets, which influences the purchasing decision of many consumers.

Recently, in India, there has been a rise in the number of nuclear families and the working population. This has driven the trend of monthly shopping to save time and effort. Due to this, the demand for products, such as citrus fruit juices, in large packs has increased.

## 9.5 ABOVE 1000 ML

### 9.5.1 INCREASING TREND OF ADOPTING CITRUS FRUIT JUICES AS PART OF REGULAR DIET PROVIDING SIGNIFICANT BUSINESS OPPORTUNITIES

Citrus fruit juices in packs above 1000 ml can be preserved for a longer duration. These packs are majorly used for mixed fruit juice and drinks, such as a mix of orange and lemon with other fruits. Large packs have an alluring shelf display compared to smaller packs in modern retail stores and supermarkets, which plays a significant role in attracting consumers to products. Due to the increased health awareness in recent years, many consumers have started depending on mixed fruit drinks for their perceived health benefits and are shifting from carbonated drinks to fruit drinks. Owing to this, the trend of adopting mixed fruit juices as part of regular diets and breakfast meals is gaining significance in India, which is expected to boost the demand for this segment.

## 10 CITRUS FRUIT JUICES MARKET, BY PACK TYPE

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### KEY FINDINGS

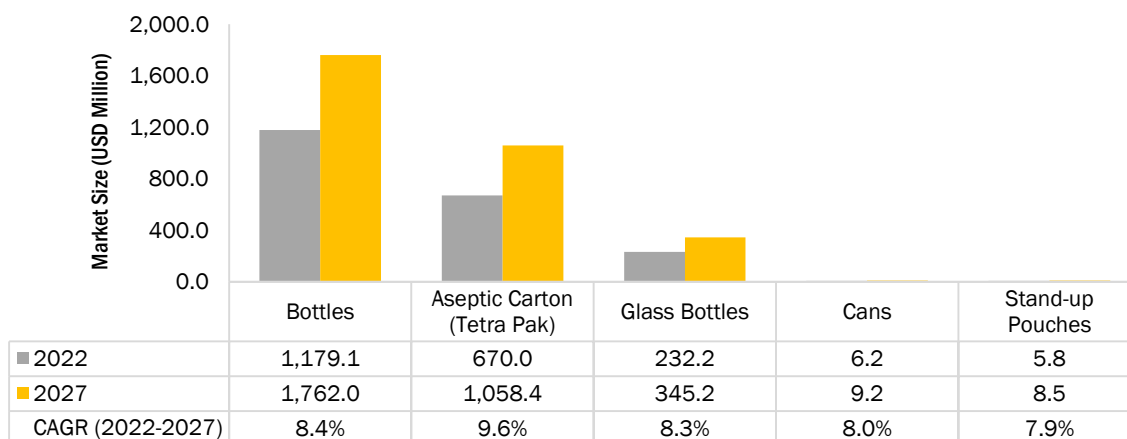
- The bottles segment dominated the market in 2021, accounting for a 56.5% market share, in terms on value. It is projected to grow at a CAGR of 8.4%, owing to the increased consumer demand as newer forms of plastic bottles, such as PET bottles, continue to gain traction in the market.
- The aseptic carton (tetra pak) segment is projected to witness the fastest growth rate of 9.6% between 2022 and 2027, in terms of value, owing to its low cost and ease of transportation.
- Glass bottles are used for packaging various citrus fruit juices due to their recyclable and aesthetic properties, which are major contributors to their market growth. However, the high transportation costs and susceptibility to breakages often result in low adoption among mainstream manufacturers.

## 10.1 INTRODUCTION

Citrus fruit juices in the Indian market are offered in bottles, aseptic cartons, glass bottles, cans, and stand-up pouches of various sizes. This is done to cater to consumers according to their preferences. Modern consumers demonstrate significant levels of consciousness regarding the environment and personal health. As a result, in recent years, manufacturers have introduced recyclable or environmentally-friendly packaging types. For instance, ITC Limited (India), in December 2021, launched Premium Fruit Beverages under its B Natural brand in an environmentally-friendly recyclable aseptic PET bottle. An official company representative mentioned that this new product offering was launched to cater to the demands of modern consumers who demonstrate a high level of awareness toward environmental and personal health.

The distribution and transportation of citrus fruit juices are also a significant challenge for manufacturers and distributors. Packaging plays an important role during distribution in terms of preserving the juices from microbial spoilage and chemical deterioration, thereby protecting the contents of the fruit juices from spoilage. Packaging of fruit juices is very significant, as it influences the customers’ purchasing behavior. As a result, companies take extensive efforts and emphasize innovating their package designs and offerings.

**FIGURE 26** CITRUS FRUIT JUICES MARKET, BY PACK TYPE, 2022 VS. 2027 (VALUE)



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

**TABLE 27** CITRUS FRUIT JUICES MARKET, BY PACK TYPE, 2020–2027 (USD MILLION)

Pack Type	2020	2021	2022	2023	2024	2025	2026	2027	CAGR (2022–2027)
Bottles	942.1	1,094.0	1,179.1	1,273.2	1,377.2	1,492.4	1,620.2	1,762.0	8.4%
Aseptic Carton (Tetra Pak)	525.3	614.9	670.0	731.5	800.0	876.7	962.4	1,058.4	9.6%
Glass Bottles	175.7	215.7	232.2	250.4	270.6	292.9	317.7	345.2	8.3%
Cans	4.5	5.8	6.2	6.7	7.2	7.8	8.4	9.2	8.0%
Stand-up Pouches	4.6	5.4	5.8	6.2	6.7	7.2	7.8	8.5	7.9%
<b>Total</b>	<b>1,652.2</b>	<b>1,935.8</b>	<b>2,093.4</b>	<b>2,268.0</b>	<b>2,461.8</b>	<b>2,677.1</b>	<b>2,916.5</b>	<b>3,183.3</b>	<b>8.7%</b>

Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

**TABLE 28** CITRUS FRUIT JUICES MARKET, BY PACK TYPE, 2020–2027 (MILLION LITERS)

Pack Type	2020	2021	2022	2023	2024	2025	2026	2027	CAGR (2022–2027)
Bottles	430.2	500.3	536.7	576.7	620.9	669.7	723.7	783.4	7.9%
Aseptic Carton (Tetra Pak)	343.5	399.1	431.6	467.7	507.7	552.2	601.7	656.8	8.8%
Glass Bottles	37.5	45.7	48.9	52.4	56.2	60.4	65.1	70.2	7.5%
Cans	17.5	22.4	23.9	25.5	27.3	29.3	31.5	34.0	7.3%
Stand-up Pouches	5.0	5.8	6.2	6.6	7.1	7.6	8.1	8.7	7.0%
<b>Total</b>	<b>833.7</b>	<b>973.3</b>	<b>1,047.3</b>	<b>1,129.0</b>	<b>1,219.3</b>	<b>1,319.3</b>	<b>1,430.1</b>	<b>1,553.1</b>	<b>8.2%</b>

Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

## 10.2 BOTTLE

### 10.2.1 RECYCLABLE PROPERTIES COUPLED WITH EASE OF TRANSPORTATION

The demand for plastic bottles in the Indian citrus fruit juice industry has always been on the higher side as the manufacturers of citrus fruit juices offer their products in plastic bottles in various shapes and sizes to address the specific demands of a larger customer base. Various types of plastic bottles used in the industry include polyethylene (PE), polyvinyl chloride (PVC), polypropylene (PP), and polyethylene terephthalate (PET) bottles. PE bottles are associated with good heat-sealing abilities, while PP bottles are used for packaging drinks that require high-temperature sterilization.

Recently, the use of PET bottles has gained significant traction in the market owing to their recyclable properties, which has been one of the major drawbacks of plastic bottles traditionally. PET bottles are also completely transparent and offer significant advantages over glass bottles as they are much more lightweight and inexpensive and are not susceptible to breakages and damage.

Owing to the rising demand for PET bottles in the fruit juice industry, companies have been launching their product offerings in PET bottles to expand their customer base in India. For instance, in August 2020, Tropicana, a brand of PepsiCo (US), announced its plans to launch its fruit juice range in new PET bottle pack types, which would be much more affordable and attractive to the consumers. An official company

representative stated that this new package launch for the company's juice range was undertaken as a response to the rising popularity of PET bottles in the industry.

### 10.3 ASEPTIC CARTON (TETRA PAK)

#### 10.3.1 LOWER COSTS CONTRIBUTING TO MARKET GROWTH

Aseptic cartons are gaining significant traction in the Indian citrus fruit juice industry because they are a low-cost and lightweight pack type that can be easily transported. They are one of the most easily recyclable packaging types, due to which they are witnessing increased demand from health-conscious consumers in the industry. Aseptic cartons can be easily stored in bulk compared to cans or jars. They are considered one of the safest pack types because of the use of sterilized packaging material for sealing the product and little or no use of preservatives. Citrus fruit juices packed in aseptic cartons are safe, fresh, and flavorful for longer. Aseptic cartons have gained momentum in the fruit juices market due to these significant advantages. Many key players operating in the industry are launching their products in aseptic cartons to consolidate their market position in the industry. For instance, in August 2020, Dabur India Limited (India) entered into a strategic partnership with Tetra Pak (Sweden) to launch its new low-calorie juice range in a new packaging type, Tetra Pak Craft. Official reports published by the company mentioned that this strategic initiative was undertaken to appeal strongly to health- and fitness-conscious consumers.

### 10.4 GLASS BOTTLES

#### 10.4.1 AESTHETIC AND RECYCLABLE PROPERTIES OF GLASS

Glass bottles are one of the popular packaging types used for citrus fruit juices because of their desirable characteristics, such as non-toxicity, transparency, airtightness, inexpensiveness, and recyclable properties. Glass bottles hold a key advantage over other pack types as they are more hygienic, fresh, and transparent, which boosts customer confidence in terms of product visibility.

Glass bottles are the most sustainable pack type, allowing producers and manufacturers to reduce a significant amount of wastage and helping them significantly keep their production costs lower than other pack types. However, they incur a higher transportation cost as they are susceptible to breakage and are heavier than other pack types.

### 10.5 CANS

#### 10.5.1 DURABILITY AND GOOD BARRIER PROPERTIES OF CANS

Metal cans are popular as one of the key pack types because of their durability and ability to withstand attrition during transportation. This makes them the most favorable packaging type for producers and manufacturers of citrus fruit juices. Cans are associated with good barrier properties, mechanical strength, and durability. They can be melted and recycled after consumption. The only drawback of cans is alkali resistance, leading to lower chemical stability. If the interior portion of the can is of lower quality, it might contaminate the drinks, leading to wastage of inventory for producers. Cans are also one of the most convenient pack types used for citrus fruit juices, as they can be transported and carried because of their convenient size and durability. Metal cans are also associated with having a longer shelf life than other packaging types, which contributes significantly to the growth and popularity of cans in the Indian citrus fruit juices market.



## 10.6 STAND-UP POUCHES

### 10.6.1 INNOVATIVE AND COST-EFFICIENT PACKAGING SOLUTION

Stand-up pouches are made from one or several layers of high-quality materials that keep the products fresh and safe. Stand-up pouches are available in various materials, sizes, and finishes and are fully customizable to match the product and brand they represent. Stand-up pouches offer significant advantages in terms of transportation, storage, and portability. They are a sustainable packaging solution, which is light in weight compared to other packaging solutions. They allow manufacturers to incorporate graphical content and logos of the brand, due to which they are considered one of the most innovative forms of packaging options for citrus fruit juices.

Stand-up pouches also have a positive perception of being a recyclable pack type, which contributes significantly to their demand, especially from the rising category of modern consumers who are highly concerned about the environment. The production cost of stand-up pouches is much lower than other pack types because they require less material for production and lead to reduced wastage and carbon footprint for manufacturers. Stand-up pouches are offered in various sizes and lengths to cater to customers with different preferences and choices. These factors have been contributing significantly to the growth of the stand-up pouches market.

## 11 CITRUS FRUIT JUICES MARKET, BY DISTRIBUTION CHANNEL

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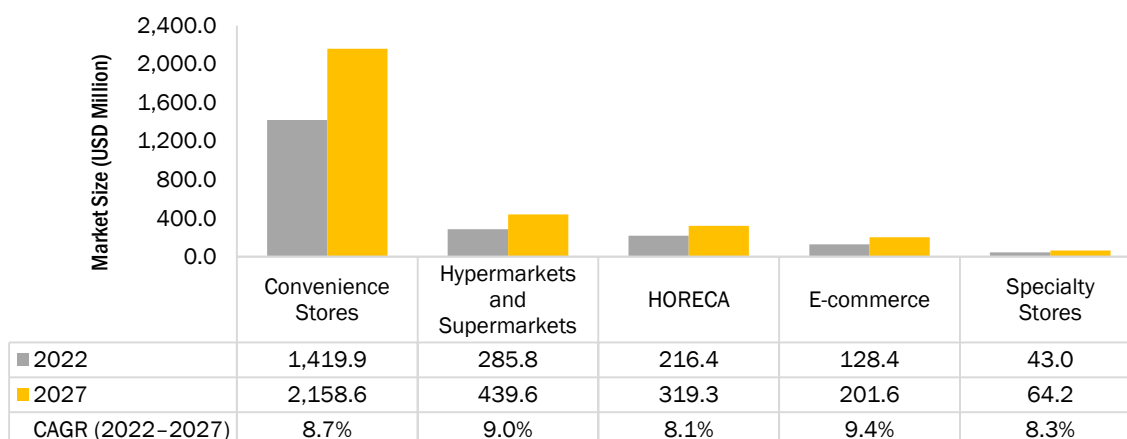
### KEY FINDINGS

- The convenience stores segment dominated the market, accounting for a share of 67.8% in 2021 in terms of value. It is expected to witness significant demand from the urban and rural regions.
- The E-commerce segment is projected to grow at the highest CAGR of 9.4% during the forecast period in terms of value.
- The COVID-19 pandemic has boosted the sales of citrus fruit juices because of their perceived health benefits and immunity-boosting properties.

## 11.1 INTRODUCTION

The Indian citrus fruit juices market has grown significantly in recent years, owing to an increasing number of consumers shifting from carbonated beverages to fruit juices. Extended shelf life, habitual purchase, rising health awareness, booming retail industry, and alluring shelf displays have played a significant role in influencing the purchase decisions of consumers in favor of citrus fruit juices in recent years. The established companies and key players operating in the Indian citrus fruit juice industry use hypermarkets and supermarkets, convenience stores, HORECA, e-commerce, and other specialty stores, such as pharmacies, gourmet stores, and health food stores, to make their products accessible to consumers. Hypermarkets and supermarkets play a key role in selling citrus fruit juices, especially in major urban areas and cities where alluring shelf displays, and attractive offers are provided. This is expected to influence the purchase decisions of consumers. Convenience stores accounted for the largest market share in the Indian citrus fruit juice industry because of their widespread presence across all the rural and urban areas. This enables citrus fruit juice companies to make their products accessible across all parts of India. The COVID-19 pandemic has also boosted the sales of citrus fruit juices because of their perceived health benefits and immunity-boosting properties. Due to the imposition of lockdown, the online e-commerce platforms and sales channels have also grown significantly, as consumers were encouraged to order groceries and other products online.

**FIGURE 27** CITRUS FRUIT JUICE MARKET (VALUE), BY DISTRIBUTION CHANNEL, 2022 VS. 2027



Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

**TABLE 29** CITRUS FRUIT JUICE MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

Distribution Channel	2020	2021	2022	2023	2024	2025	2026	2027	CAGR (2022–2027)
Convenience Stores	1,116.9	1,313.0	1,419.9	1,538.3	1,669.6	1,815.6	1,977.9	2,158.6	8.7%
Hypermarkets and Supermarkets	226.3	263.6	285.8	310.3	337.6	368.0	401.8	439.6	9.0%
HORECA	166.9	201.3	216.4	233.0	251.4	271.8	294.3	319.3	8.1%
E-commerce	104.1	117.9	128.4	140.0	152.9	167.4	183.5	201.6	9.4%
Specialty Stores	38.0	39.9	43.0	46.4	50.2	54.4	59.0	64.2	8.3%
<b>Total</b>	<b>1,652.2</b>	<b>1,935.8</b>	<b>2,093.4</b>	<b>2,268.0</b>	<b>2,461.8</b>	<b>2,677.1</b>	<b>2,916.5</b>	<b>3,183.3</b>	<b>8.7%</b>

Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

**TABLE 30** CITRUS FRUIT JUICE MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (MILLION LITERS)

Distribution Channel	2020	2021	2022	2023	2024	2025	2026	2027	CAGR (2022–2027)
Convenience Stores	563.6	660.2	710.3	765.7	826.9	894.7	969.8	1,053.1	8.2%
Hypermarkets and Supermarkets	114.2	132.6	143.0	154.5	167.2	181.3	197.0	214.5	8.4%
HORECA	84.2	101.2	108.3	116.0	124.5	133.9	144.3	155.8	7.5%
E-commerce	52.5	59.3	64.2	69.7	75.7	82.5	90.0	98.4	8.9%
Specialty Stores	19.2	20.1	21.5	23.1	24.8	26.8	28.9	31.3	7.8%
<b>Total</b>	<b>833.7</b>	<b>973.3</b>	<b>1,047.3</b>	<b>1,129.0</b>	<b>1,219.3</b>	<b>1,319.3</b>	<b>1,430.1</b>	<b>1,553.1</b>	<b>8.2%</b>

Source: Secondary Research, Primary Interviews, Related Research Publications, Press Releases, Industry Journals, and MarketsandMarkets Analysis

## 11.2 CONVENIENCE STORES

### 11.2.1 STRONG GEOGRAPHICAL AND DISTRIBUTION NETWORK ACROSS RURAL AND URBAN AREAS

Convenience stores are one of the largest distribution channels for citrus fruit juices in India, owing to their widespread presence across all the major urban and rural areas. They have a presence even in those areas where other corporate retail chains and supermarkets cannot penetrate. In recent years, many new players have launched convenience stores in India, which has further strengthened its nationwide network. For instance, in April 2021, The New Shop (India), a Delhi-based retail startup, launched 24-hour convenience stores to sell essential items, such as groceries, snacks, beverages, etc., at railway stations, bus stations, metros, and petrol pumps, across the country. Similarly, Reliance Retail Ventures Limited (India) entered into a strategic agreement with 7-Eleven, Inc. (US) in October 2021 to launch multinational 7-Eleven convenience stores in India to sell groceries, snacks, beverages, and other essential items. As the convenience store network in India continues to strengthen, it will present significant business opportunities for citrus fruit juice products over the forecast period.

## 11.3 HYPERMARKETS AND SUPERMARKETS

### 11.3.1 HABITUAL PURCHASE, ALLURING SHELF DISPLAYS, AND DISCOUNTED PRICE OFFERS ON PRODUCTS

Hypermarkets and supermarkets are one of the fastest-growing distribution channels in India. This is because of their alluring shelf displays and attractive discounts, which makes the products more attractive to consumers and enables them to compare the products and brands in terms of prices, ingredients, nutritional content, etc. Manufacturers adopt hypermarkets and supermarkets to enhance the market penetration for their products, especially in urban areas where the presence of hypermarkets and supermarkets is generally higher than in rural areas. Many popular hypermarkets and supermarkets have also enabled doorstep delivery, especially after the COVID-19 pandemic and lockdown, which has also played a key role in enhancing the market share of this segment. With the growing awareness about the health benefits of citrus fruit juices and a rising number of people shifting from beverages to citrus fruit juice products, many consumers are making a habitual purchase of these products in hypermarkets and supermarkets, which is likely to continue to drive the growth of this segment over the forecast period.

## 11.4 HORECA

### 11.4.1 BETTER BRAND VISIBILITY

HORECA includes hotels, restaurants, cafes, and other institutions that serve consumers food outside their homes. This is a very lucrative industry for the citrus fruit juice companies, as it allows them to reach a larger customer base, which enhances their brand visibility. Due to this, the key players operating in the citrus fruit juice industry are establishing partnerships with leading food service chains in the Indian market to expand their customer base. For instance, ITC Limited (India), in November 2021, entered into a strategic partnership with McDonald's (US) to include their B-Natural fruit juices as part of their happy meal in all McDonald's restaurants across West and South India. An official representative from the company mentioned that this strategic initiative was intended to provide more brand visibility to their B-Natural brand and expand their customer base in the country. Establishing partnerships with leading food service chains and restaurants allows the companies to expand their customer base and aid them in customer acquisition in terms of quality, flavor, and taste of the products.

## 11.5 E-COMMERCE

### 11.5.1 RISING TREND OF ONLINE SHOPPING FOR FOOD AND BEVERAGES

With the age of digitization, many consumers are purchasing goods and services over the internet. With the rise in e-commerce platforms, many players operating in the industry have started selling their citrus fruit juice products on e-commerce platforms to expand their customer base and increase their market penetration in the country.

Since the outbreak of COVID-19, e-commerce platforms have gained significant popularity. During the imposition of the lockdown, consumers were encouraged to stay inside their homes, which significantly contributed to the trend of online shopping in India. Due to the rising business opportunities offered by the online e-commerce platforms, key players operating in the industry are establishing partnerships with leading e-commerce companies in India. For instance, ITC Limited (India) entered into a strategic partnership with Amway (US) in May 2020 to sell and distribute their new fruit juice range derived from orange and mixed fruit, under the B Natural+ brand, on Amway's e-commerce website and through their network of direct sellers. The e-commerce platforms continue to be preferred by customers. Hence, the segment will likely witness significant growth over the forecast period.

## 11.6 SPECIALTY STORES

Citrus fruit juice products are also offered through other distribution channels, such as health food stores, gourmet stores, and pharmacies. Some popular pharmacies operating in Indian markets, such as Apollo Pharmacy (India) and Emami Frank Ross (India), offer citrus fruit juices through their websites and retail pharmacy stores. Some of the prominent gourmet stores operating in the Indian citrus fruit juice industry have been expanding their geographical presence across India, which presents significant business opportunities for companies operating in the industry. For instance, Nature's Basket (India), a popular gourmet store and grocery delivery chain in India that offers a range of orange and other citrus fruit juices, extended its operations to Kolkata and opened its 34th outlet to increase its customer base in the country. Due to the rising health awareness in India, consumers have also shown a greater preference for purchasing citrus fruit juices and other health products from health food stores due to their positive perception of authenticity and quality with regard to health. Though the market share of these distribution channels is marginal in the Indian citrus fruit juice industry, the increased focus on health awareness and increased demand for citrus fruit juice products are likely to propel their growth over the forecast period.

## 12 COMPETITIVE LANDSCAPE

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### 12.1 OVERVIEW

The competitive landscape includes the market share analysis of the key players in the Indian citrus fruit juices market. The analysis of the key industry players is based on their recent developments, products offered, geographical presence, and company revenues. The competitive landscape also includes the key growth strategies adopted by the market players between January 2019 and June 2022 to expand their global presence and increase their market share.

Since the Indian citrus fruit juices market is a consolidated one, the existing players are fixated upon improving their market shares, while newer startups are being established rapidly. Moreover, the citrus fruit juices market in India has many organized players and unorganized players present at the local level in various states of India.

Key players in this market include PepsiCo (US), Dabur India Limited (India), ITC Limited (India), Hector Beverages Private Limited (India), Patanjali Ayurved (India), The Coca-Cola Company (US), Smoodies (India), Del Monte Foods, Inc. (US), Rus Organic (India), Rakyan Beverages (India), Storia Foods (India), Spoorthy Organic Farmers (India), Axiom Ayurveda Pvt. Ltd. (India), Dole plc (US), and HealthySip (India).

**Major strategies identified include the following:**

- New product launches
- Deals (partnerships and investments)
- Others (expansions)

### 12.2 MARKET SHARE ANALYSIS, 2021

It is important to identify the key players while studying a market. The company's market share helps analyze the company's share in the market. The analysis related to the key players and their shares in the market helps identify the extent to which they provide a premium-quality product, premium service, or price advantage. A company with a large market share is most likely to have higher profit margins. The market share explains the consumer preference for a product over similar ones. A larger market share also signifies that the company has achieved economies of scale in procurement, manufacturing, marketing, and other cost components.

Major decisions related to strategies and product developments are examined thoroughly in terms of how they are likely to impact the company's market share. Companies focus on expanding their production facilities, entering into partnerships and agreements, and launching new products to grow their businesses and market share. The market share analysis conducted by MarketsandMarkets portrays that the current market structure of the citrus fruit juices market is consolidated, with the top five players accounting for ~55% share in the Indian citrus fruit juices market.

**TABLE 31** CITRUS FRUIT JUICES MARKET SHARE ANALYSIS, 2021

DEGREE OF COMPETITION	CONSOLIDATED
Top 5 Players <ul style="list-style-type: none"> <li>▪ Dabur India Limited (India)</li> <li>▪ PepsiCo (US)</li> <li>▪ ITC Limited (India)</li> <li>▪ The Coca-Cola Company (US)</li> <li>▪ Patanjali Ayurved (India)</li> </ul>	~55%
Other Key Players (Hector Beverages Private Limited (India), Smoodies (India), Del Monte Foods, Inc. (US), Rus Organic (India), Rakyan Beverages (India), Storia Foods (India), Spoorthy Organic Farmers (India), Axiom Ayurveda Pvt. Ltd. (India), Dole plc (US), and HealthySip (India), among others)	~45%

THE DEGREE OF COMPETITION IS DEFINED AS BELOW:

*Fragmented:* When the top five players have a total market share <25%

*Competitive:* When the top five players have a total of 25%–50% market share

*Consolidated:* When the top five players have a total market share >50%

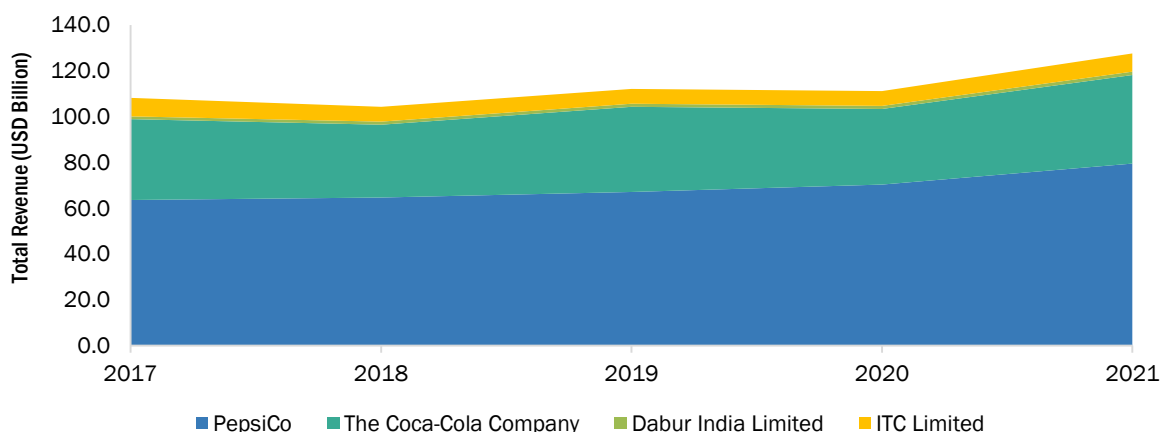
*Note:* The market share estimation is based on the production capacities of key players, overall product offerings, business strategies, company revenues, and the regional presence of companies in the market.

*Source:* Annual Reports, Press Releases, Investor Presentations, Primary Interviews, and MarketsandMarkets Analysis

### 12.3 HISTORICAL REVENUE ANALYSIS OF KEY PLAYERS

This section provides insights into the total annual revenues of key players in the citrus fruit juices market from 2017 to 2021.

**FIGURE 28** TOTAL REVENUE ANALYSIS OF KEY PLAYERS, 2017–2021 (USD BILLION)



*Note:* The total annual revenue has been considered.

*Source:* Secondary Research, Primary Interviews, Industry Journals, Related Research Publications, Press Releases, and MarketsandMarkets Analysis



The revenue analysis of key players in the citrus fruit juices market suggests that PepsiCo (US) and The Coca-Cola Company (US) account for the largest revenue share, followed by ITC Limited (India) and Dabur India Limited (India). The size of the citrus fruit juices market, in terms of value, based on product, was derived using forecasting techniques based on the demand patterns and available offerings. The top players in the market have been focusing on expanding their market presence, enhancing their solutions, launching new products, and partnering with many channel partners and technology companies to cater to consumers globally. The deep roots of key players in the market and their robust offerings are among the major factors that have helped the company acquire a major share in the Indian citrus fruit juices market.

## 12.4 COMPANY EVALUATION QUADRANT

The company evaluation matrix provides an overview of the relative market position of the major players operating in the citrus fruit juices market based on the strength of their product offerings and business strategies, which are analyzed based on a proprietary model. The relative robustness of product offerings is analyzed objectively using the information available in the public domain about the portfolio strength, innovation strength, and geographical reach. Equal weightage is assigned to the factors mentioned above to ascertain an overall score for the selected players in the citrus fruit juices market.

Similarly, the relative robustness of business strategies is analyzed objectively using the information available in the public domain pertaining to industry coverage, operating and financial strength, and growth attempt endeavors. Equal weightage is assigned to the factors mentioned above to ascertain an overall score for the selected players in the citrus fruit juices market.

The company evaluation matrix is prepared based on ascertained scores on both these parameters that depict the differentiation of selected players as stars, pervasive players, emerging leaders, and participants.

Key players in this market include PepsiCo (US), Dabur India Limited (India), ITC Limited (India), Hector Beverages Private Limited (India), Patanjali Ayurved (India), The Coca-Cola Company (US), Smoodies (India), Del Monte Foods, Inc. (US), Rus Organic (India), Rakyan Beverages (India), Storia Foods (India), Spoorthy Organic Farmers (India), Axiom Ayurveda Pvt. Ltd. (India), Dole plc (US), and HealthySip (India).

### 12.4.1 STARS

Stars are leading market players that have undertaken new developments, such as product launches and innovative technologies, and have adopted growth strategies. These players have a broad product offering that caters to most regions. Star players focus on acquiring a leading market position through strong financial capabilities and well-established brand equity. For this study, PepsiCo (US), Dabur India Limited (India), ITC Limited (India), The Coca-Cola Company (US), and Patanjali Ayurved (India) have been identified as stars.

### 12.4.2 PERVASIVE PLAYERS

Key players with a relatively high score on the business strategy robustness criteria, compared to their peers and their scores on product offering robustness, are termed pervasive players. For this study, Rakyan Beverages (India), Rus Organic (India), HealthySip (India), Axiom Ayurveda Pvt. Ltd. (India), Smoodies (India), and Spoorthy Organic Farmers (India) have been particularly identified as pervasive players.

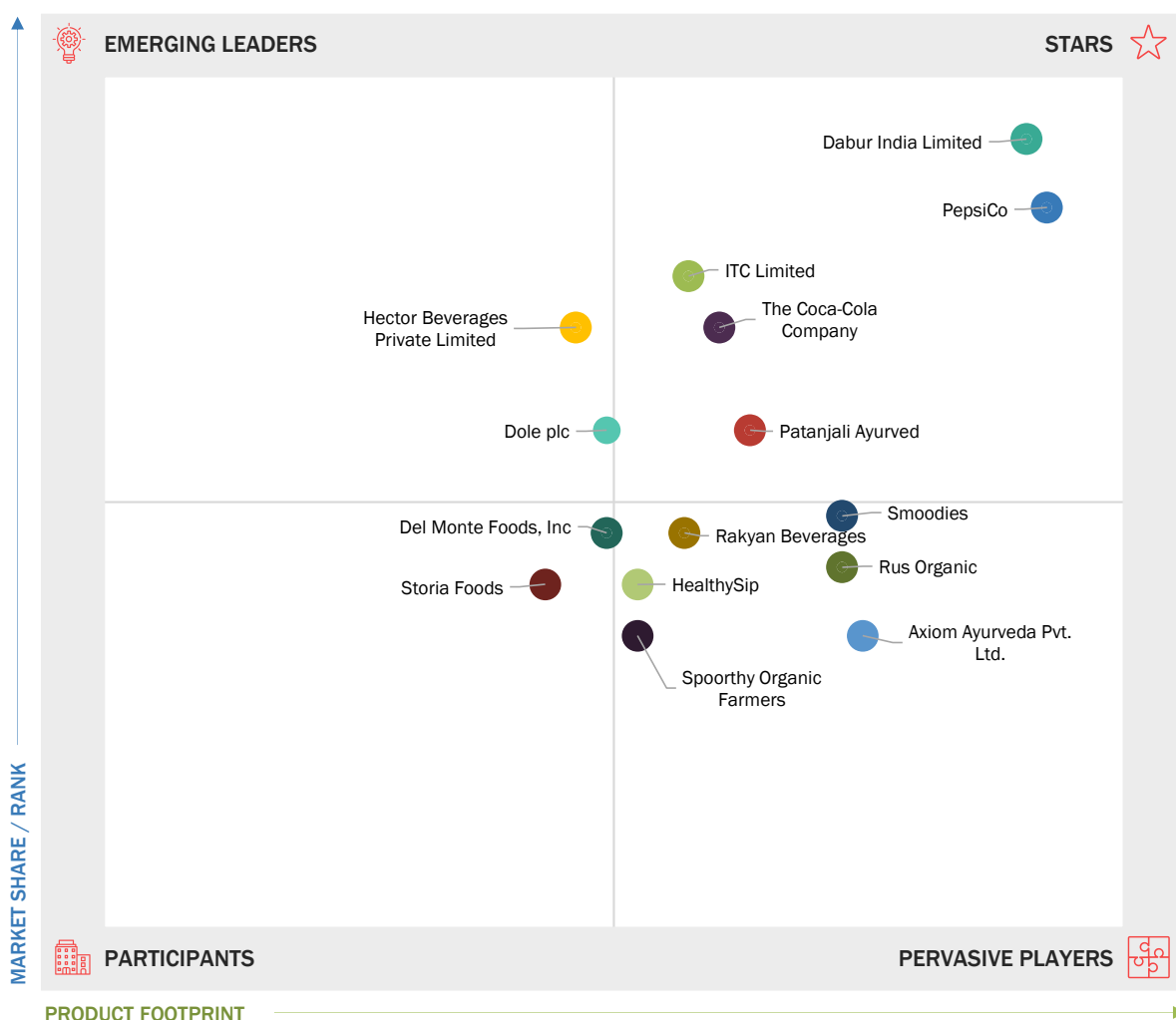
### 12.4.3 EMERGING LEADERS

Emerging leaders have a strong focus on innovations and invest strongly in their R&D endeavors. These players have quality certificates and are identified as emerging leaders in the citrus fruit juices market. For this study, Hector Beverages Private Limited (India) and Dole plc (US) have been identified as emerging leaders.

### 12.4.4 PARTICIPANTS

As the market poses a moderate threat to new entrants in establishing their footprint, several players are engaged in the citrus fruit juices market to expand their businesses globally. The participant players identified for the citrus fruit juices market include Del Monte Foods, Inc. (US) and Storia Foods (India).

**FIGURE 29** CITRUS FRUIT JUICES MARKET: COMPANY EVALUATION QUADRANT, 2021



Source: Company Websites, Annual Reports, Presentations, and MarketsandMarkets Analysis

### 12.4.5 CITRUS FRUIT JUICES MARKET: PRODUCT FOOTPRINT

**TABLE 32** COMPANY FOOTPRINT, BY TYPE

COMPANY	FRUIT DRINKS	NECTARS	100% FRUIT JUICE (NFC)	OVERALL FOOTPRINT, BY TYPE
PepsiCo	No	Yes	Yes	2.00
Dabur India Limited	Yes	Yes	Yes	3.00
ITC Limited	Yes	No	No	1.00
Hector Beverages Private Limited	Yes	No	No	1.00
Patanjali Ayurved	Yes	No	No	1.00
The Coca-Cola Company	Yes	No	No	1.00
Smoodies	No	Yes	Yes	2.00
Del Monte Foods, Inc.	Yes	No	No	1.00
Rus Organic	Yes	No	Yes	2.00
Rakyan Beverages	No	No	Yes	1.00
Storia Foods	No	No	Yes	1.00
Spoorthy Organic Farmers	No	No	Yes	1.00
Axiom Ayurveda Pvt. Ltd.	Yes	No	No	1.00
Dole plc	Yes	Yes	No	2.00
HealthySip	No	No	Yes	1.00

Source: Company Website

**TABLE 33** COMPANY FOOTPRINT, BY FRUIT TYPE

COMPANY	ORANGE	GRAPES	LIME/LEMON	MIXES AND OTHERS	OVERALL FOOTPRINT, BY FRUIT TYPE
PepsiCo	Yes	No	Yes	Yes	3.00
Dabur India Limited	Yes	Yes	Yes	Yes	4.00
ITC Limited	Yes	No	No	No	1.00
Hector Beverages Private Limited	No	No	No	Yes	1.00
Patanjali Ayurved	Yes	No	Yes	No	2.00
The Coca-Cola Company	Yes	No	No	No	1.00
Smoodies	Yes	No	No	Yes	2.00
Del Monte Foods, Inc.	No	No	No	Yes	1.00
Rus Organic	No	No	Yes	Yes	2.00
Rakyan Beverages	Yes	Yes	No	Yes	3.00
Storia Foods	No	No	Yes	No	1.00
Spoorthy Organic Farmers	Yes	No	No	Yes	2.00
Axiom Ayurveda Pvt. Ltd.	Yes	No	Yes	Yes	3.00
Dole plc	No	No	No	Yes	1.00
HealthySip	Yes	No	No	Yes	2.00

Source: Company Website

**TABLE 34** COMPANY FOOTPRINT, BY PACK TYPE

COMPANY	GLASS BOTTLES	CANS	ASEPTIC CARTON (TETRA PAK)	BOTTLES	STAND-UP POUCHES	OVERALL FOOTPRINT, BY PACK TYPE
PepsiCo	No	No	Yes	Yes	No	2.00
Dabur India Limited	No	No	Yes	No	No	1.00
ITC Limited	No	No	Yes	Yes	No	2.00
Hector Beverages Private Limited	No	No	No	No	Yes	1.00
Patanjali Ayurved	No	No	Yes	Yes	No	2.00
The Coca-Cola Company	No	No	Yes	Yes	No	2.00
Smoodies	Yes	No	No	No	No	1.00
Del Monte Foods, Inc.	No	Yes	No	No	No	1.00
Rus Organic	No	No	No	Yes	No	1.00
Rakyan Beverages	No	No	No	Yes	No	1.00
Storia Foods	No	No	No	Yes	No	1.00
Spoorthy Organic Farmers	Yes	No	No	No	No	1.00
Axiom Ayurveda Pvt. Ltd.	No	No	No	Yes	No	1.00
Dole plc	No	Yes	No	No	No	1.00
HealthySip	Yes	No	No	No	No	1.00

Source: Company Website

**TABLE 35** COMPANY FOOTPRINT, BY PACK SIZE

COMPANY	0-200ML	201-500ML	501-1000ML	OVERALL FOOTPRINT, BY PACK SIZE
PepsiCo	Yes	Yes	Yes	3.00
Dabur India Limited	Yes	No	Yes	2.00
ITC Limited	No	Yes	Yes	2.00
Hector Beverages Private Limited	Yes	No	No	1.00
Patanjali Ayurved	Yes	Yes	Yes	3.00
The Coca-Cola Company	No	Yes	Yes	2.00
Smoodies	Yes	No	Yes	2.00
Del Monte Foods, Inc.	No	Yes	No	1.00
Rus Organic	Yes	Yes	No	2.00
Rakyan Beverages	Yes	Yes	Yes	3.00
Storia Foods	Yes	No	No	1.00
Spoorthy Organic Farmers	Yes	No	No	1.00
Axiom Ayurveda Pvt. Ltd.	Yes	Yes	Yes	3.00
Dole plc	No	Yes	No	1.00
HealthySip	Yes	No	No	1.00

Source: Company Website

**TABLE 36** OVERALL COMPANY FOOTPRINT

COMPANY	TYPE FOOTPRINT	FRUIT TYPE FOOTPRINT	PACK TYPE FOOTPRINT	PACK SIZE FOOTPRINT	TOTAL SCORE
PepsiCo	2.00	3.00	2.00	3.00	10.00
Dabur India Limited	3.00	4.00	1.00	2.00	10.00
ITC Limited	1.00	1.00	2.00	2.00	6.00
Hector Beverages Private Limited	1.00	1.00	1.00	1.00	4.00
Patanjali Ayurved	1.00	2.00	2.00	3.00	8.00
The Coca-Cola Company	1.00	1.00	2.00	2.00	6.00
Smoodies	2.00	2.00	1.00	2.00	7.00
Del Monte Foods, Inc.	1.00	1.00	1.00	1.00	4.00
Rus Organic	2.00	2.00	1.00	2.00	7.00
Rakyan Beverages	1.00	3.00	1.00	3.00	8.00
Storia Foods	1.00	1.00	1.00	1.00	4.00
Spoorthy Organic Farmers	1.00	2.00	1.00	1.00	5.00
Axiom Ayurveda Pvt. Ltd.	1.00	3.00	1.00	3.00	8.00
Dole plc	2.00	1.00	1.00	1.00	5.00
HealthySip	1.00	2.00	1.00	1.00	5.00

Source: Company Website

## 12.5 COMPETITIVE SCENARIO

### 12.5.1 NEW PRODUCT LAUNCHES

Players adopted this strategy to strengthen their product portfolios.

**TABLE 37** CITRUS FRUIT JUICES MARKET: NEW PRODUCT LAUNCHES, 2021

MONTH & YEAR	COMPANY NAME	PRODUCT TYPE	PRODUCT NAME	DESCRIPTION
December 2021	ITC Limited (India)	PET Beverage	Premium Fruit Beverages	The company launched Premium Fruit Beverages under its B Natural brand in an environmentally friendly recyclable aseptic PET bottle. The company launched this new product offering to cater to the demands of modern consumers who demonstrate a high level of awareness toward environmental and personal health.

Source: Company Websites, Company Publications, and Press Releases

### 12.5.2 DEALS

The players adopted this strategy to gain a significant share in the market.

**TABLE 38** CITRUS FRUIT JUICES MARKET: DEALS, 2020-2022

MONTH & YEAR	DEAL TYPE	COMPANY NAME 1	COMPANY NAME 2	DESCRIPTION
March 2022	Partnership	Hector Beverages Private Limited. (India)	The Script Room (India)	Paper Boat, a brand of Hector Beverages Private Limited, announced 'The Script Room' as its creative partner to co-create the brand's communication initiative and increase the reach of their products to a larger customer base.
November 2021	Partnership	ITC Limited (India)	McDonald's (US)	ITC Limited and McDonald's entered into a strategic partnership to include B-Natural fruits and beverages as part of McDonald's Happy Meal. This strategic initiative was undertaken to achieve more product visibility and enable it to reach a larger number of customers.
August 2020	Partnership	Dabur India Limited (India)	Tetra Pak (Sweden)	Dabur India Limited and Tetra Pak, a Swedish multinational food packaging and processing company, entered into a partnership to launch a new low-calorie juice range in a different packaging format to cater to the growing health-conscious consumers and strengthen their product portfolio of juices.
May 2020	Partnership	ITC Limited (India)	Amway India (US)	The company entered a strategic partnership with Amway India (US) to launch a new range of B Natural+ fruit juice derived from orange and mixed fruit. This strategic initiative was intended to strengthen its product portfolio and consolidate its market position in the citrus fruit juice market.

Source: Company Websites, Company Publications, and Press Releases



### 12.5.3 OTHERS

**TABLE 39** CITRUS FRUIT JUICES MARKET: OTHERS, 2019-2022

MONTH & YEAR	DEAL TYPE	DESCRIPTION
August 2022	Expansion	The Coca-Cola Company announced its expansion plans through new product launches under its 'Minute Maid' brand, which caters to a larger customer base and enhances its brand visibility.
January 2022	Expansion	Rakyan Beverages (India) expanded its bottle range to limited edition 'Spiderman: No Way Home' bottles, which was one of the biggest movie releases of 2021. This strategic initiative was undertaken to enhance its brand visibility and expand its customer base by making its bottles more appealing to a larger number of consumers.
November 2021	Expansion	Wingreen Farms (India), the parent company of Rakyan Beverages (India), announced its aggressive expansion plans to further grow in the Indian citrus fruit juice market after it received investment from Investcorp (Bahrain) and Omidyar Network (US) by onboarding new food and beverage brands to consolidate its market position in the industry.
July 2021	Investment	Patanjali Ayurved (India) announced its plans to invest USD 1.35 billion by 2025 to support the company's aggressive expansion plans and bolster its R&D capabilities.
June 2021	Expansion	The company announced its expansion plans by setting up its largest manufacturing plant in Madhya Pradesh, India, which will allow the company to enhance its production capacity and efficiently cater to the rising demand for its products.
January 2021	Expansion	Hector Beverages Private Limited announced its intention to expand the distribution capabilities of its 'Paper Boat' brand by launching products that would be available only on its online platforms and expanding the distribution capabilities of its convenience stores to reach a larger number of customers.
August 2020	Expansion	Tropicana Products, Inc. (US), a subsidiary of PepsiCo (US), announced its expansion plans by launching polyethylene terephthalate (PET) bottles for its on-the-go consumers. This strategic initiative was undertaken to make the products more accessible to a larger number of consumers.
March 2019	Investment	The company received an investment worth USD 1.45 million from A91 Partners (India) as part of its investment plans in Series-B stage startups. The company intended to use this investment to expand its business in healthy beverage products.
March 2019	Expansion	The company increased its workforce by hiring 738 management professionals to supplement its aggressive expansion plans to double its retail outlets in India. The company intended to reach 10,000 retail outlets with this strategic initiative to reach a larger customer base.

Source: Company Websites, Company Publications, and Press Releases

## 13 COMPANY PROFILES

### 13.1 KEY PLAYERS

#### 13.1.1 PEPSICO

##### 13.1.1.1 Business overview

PepsiCo is a multinational food, snack, and beverage corporation. It is one of India's leading players in the citrus fruit juice industry. The company operates across the globe through its 22 brands. It operates in the Indian markets through brands, such as Pepsi, Lay's, Kurkure, Tropicana, Gatorade, Uncle Chipps, and Quaker, which are highly popular among Indian consumers. The company offers citrus fruit juice through its brand 'Tropicana Products, Inc. (US).' Under this brand, it offers a host of citrus fruit juice products derived from various fruit types, such as orange, sweet lime, and other mixes.

The company has global recognition and presence in more than 200 countries across all the major regions, such as North America, Europe, Asia Pacific, South America, and the Middle East and Africa. The company has a strong distribution network and operates through a robust supply chain network, which enables the company to cater efficiently to the Indian markets. The company operates in India through a network of partnerships with more than 24,000 farmers across nine states, with more than 45 percent being small-scale farmers.

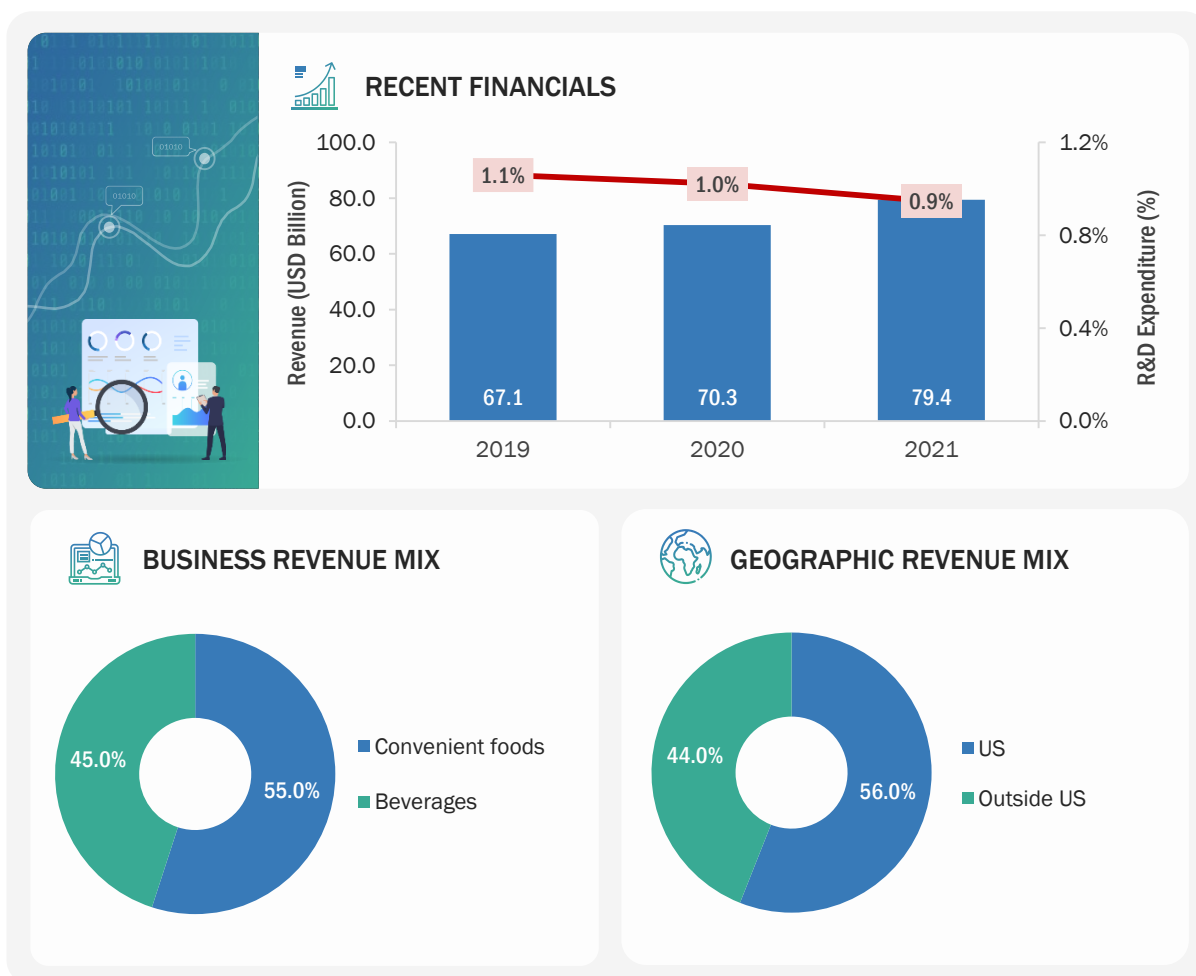
The company faces competition from other key players in the citrus fruit juice industry. Some of these players are Dabur India Limited (India), ITC Limited (India), Patanjali Ayurveda (India), etc.

**TABLE 40 PEPSICO: BUSINESS OVERVIEW**

PEPSICO	
Year	1965
Country	US
City	Harrison, NU, US
Total No. of Employees	309,000
Overall Annual Revenue (Global)	USD 79.4 Billion
Ownership	Public (NASDAQ: PEP)

Source: Company Website and Annual Reports

**FIGURE 30** PEPSICO: COMPANY SNAPSHOT



Source: Company Website, Company Publications, and Company Annual Reports

**13.1.1.2** Products/Services/Solutions offered

**TABLE 41** PEPSICO: PRODUCTS/SOLUTIONS/SERVICES OFFERED

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Orange	<ul style="list-style-type: none"> <li>Tropicana Orange Delight</li> <li>Tropicana 100% Orange Fruit Juice</li> </ul>	The company has a range of orange juices as part of its citrus fruit juice product made available in different pack sizes, such as 0-200 ml, 1000 ml, etc., in an aseptic carton (tetra pack).	Aseptic Carton
Sweet Lime	Tropicana Mosambi Delight	The company offers lemonade as part of its citrus fruit juice products in 0-200 ml, 201-500 ml, and 1000 ml sizes in aseptic cartons.	Aseptic Carton
Mixed	Tropicana Mixed Fruit Delight	The company offers mixed citrus fruit juice products as part of its portfolio. It contains orange and other fruit juices and is made available in tetra packs and bottles of 1000 ml and 500 ml.	Bottle Aseptic Carton

Mixed	Tropicana 100% Mixed Fruit Juice	The company offers mixed fruit juice containing orange and other fruit juices as part of its citrus fruit juice portfolio made available in aseptic cartons of sizes 200 ml and 1000 ml.	Aseptic Carton
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Source: Company Website

### 13.1.1.3 Recent developments

**TABLE 42** PEPSICO: OTHERS

MONTH-YEAR	DEAL TYPE	DESCRIPTION
August 2020	Expansion	Tropicana Products, Inc. (US), a subsidiary of PepsiCo (US), announced its expansion plans by launching polyethylene terephthalate (PET) bottles for its on-the-go consumers. This strategic initiative was undertaken to make the products more accessible to a larger number of consumers.

Source: Company Websites, Company Publications, and Press Releases

### 13.1.1.4 MnM view

PepsiCo (US) is one of the multinational organizations operating in the citrus fruit juice market with a strong geographical presence across all the major regions. The company commands a strong product portfolio and an efficient supply chain management system, giving it a key competitive advantage over its rivals. The company recently sold a certain stake of its Tropicana and other fruit juice brands to PAI Partners (France), a French private equity firm, to streamline its product offerings and move toward health-focused food and beverages, moving away from high-sugar drinks. This strategic initiative would continue to contribute toward the overall profitability of the company, which was undertaken keeping in mind the health-focused dietary requirements of today's consumers, who are much more aware and label-conscious.

#### 13.1.1.4.1 Key strengths/Right to win

The company's geographic presence and strong recognition are its key strengths in the Indian citrus fruit juice market. The company's strong product portfolio, which offers fruit juices from various fruit types such as grapes, oranges, lemon, and other mixed fruit blends, also gives it a key competitive edge over its local rivals. The company has also been making extensive efforts to reach a larger consumer base in India by launching new styles of packaging for its juices in a bid to make them more appealing to its consumers, especially the younger generation, who are one of the primary consumers.

#### 13.1.1.4.2 Strategic choices made

The company has been focusing on establishing partnerships with other players in the Indian citrus fruit juice industry to grow its business in India. Recently, in August 2020, the company also launched new advertisement campaigns, which were intended to reach a larger consumer base, especially targeting the younger generation, who are one of the active consumers of citrus fruit juice products in India. It has also been making available its product offerings in different packaged sizes, such as PET bottles, which are intended to increase the accessibility of its products and expand its customer base.

#### 13.1.1.4.3 Weaknesses and competitive threats

Though the company has a strong product portfolio and strong recognition in India, more than half of its business revenue is concentrated in the US. The company also faces competition from local and small-scale citrus fruit juice manufacturers in India. One of the significant challenges that the company faces is growing and expanding its business in developing nations, such as India, considering a large number of factors, such as price, competition, cultural differences, consumer preference and acceptance, inflation, and method of distribution, which may impact its profitability and global revenue.

## 13.1.2 DABUR INDIA LIMITED

### 13.1.2.1 Business overview

Dabur India Limited is one of India's highly accredited and reputable companies. It offers health-focused products and is also one of the key players in India's citrus fruit juice segment. The company operates through four different strategic business units, namely consumer care business, food & beverage business, international business, and others. The company offers its citrus fruit juice products as part of its food & beverage business segment under its 'Réal' brand, which has a range of citrus fruit juice product offerings derived from different fruit types, such as orange, grapes, sweet lime, and other mixed fruit blends.

Réal is one of the company's key brands. It is among the fastest-growing brands of the company, owing to its large acceptance and popularity in India, due to which it has gained a significant consumer base in recent years. The company operates through a large network of farmers in India and has a well-established network of more than 7,000 farmers in India and Nepal. The company also has a strong manufacturing base in India with 12 manufacturing locations spread out across the country, along with 8 overseas manufacturing locations to support their operations.

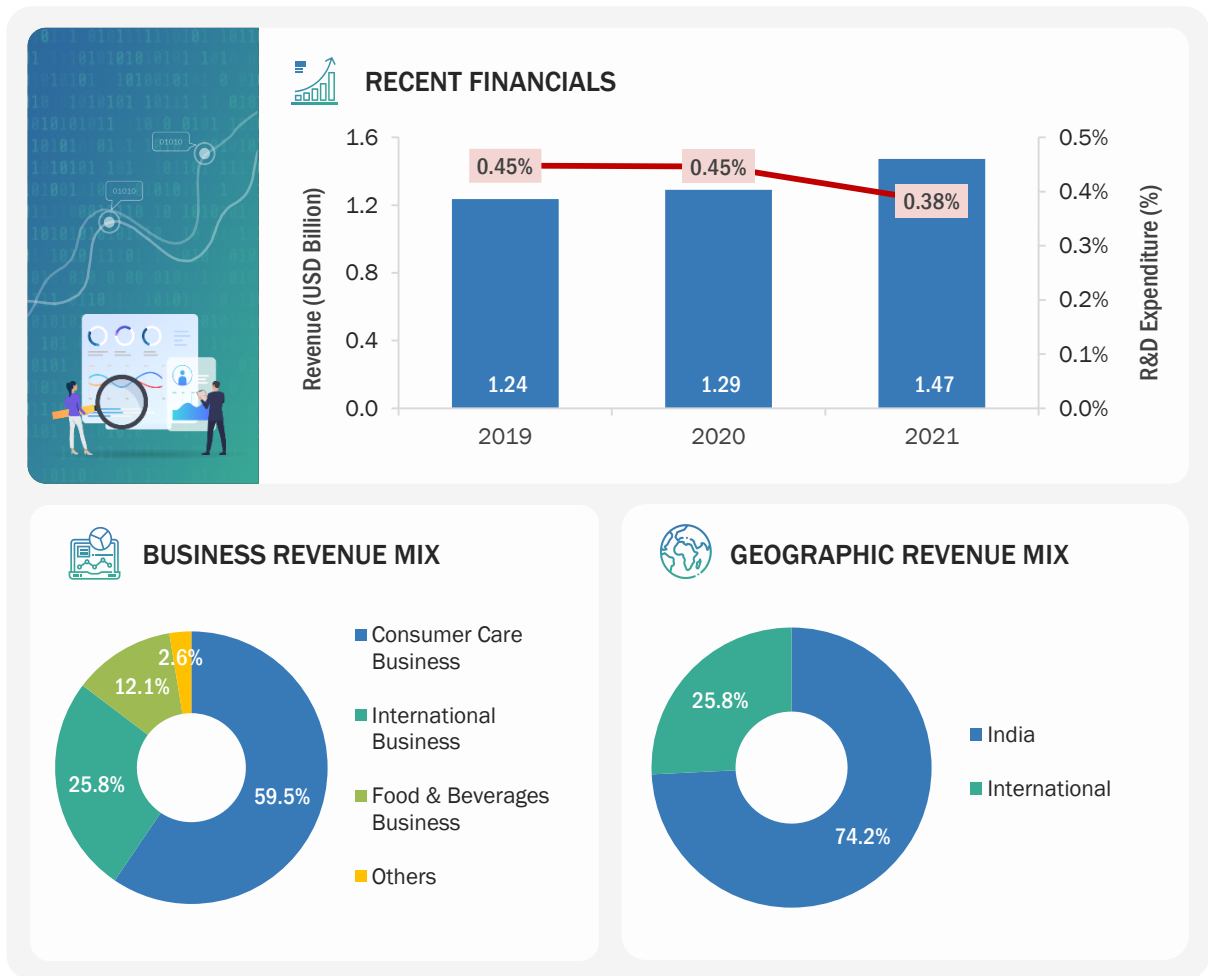
The company faces competition from key players and local players in the Indian citrus fruit juice markets, such as PepsiCo (India), The Coca-Cola Company (US), and Rus Organic (India).

**TABLE 43** DABUR INDIA LIMITED: BUSINESS OVERVIEW

DABUR INDIA LIMITED	
Year	1884
Country	India
City	Ghaziabad
Total No. of Employees	8,562
Overall Annual Revenue (Global)	USD 1.47 Billion
Annual Revenue (India)	USD 1.09 Billion
Ownership	Public (NSE: DABUR)

Source: Company Website and Annual Reports

**FIGURE 31** DABUR INDIA LIMITED: COMPANY SNAPSHOT



Source: Company Website, Company Publications, and Company Annual Reports

### 13.1.2.2 Products/Services/Solutions offered

**TABLE 44** DABUR INDIA LIMITED: PRODUCTS/SOLUTIONS/SERVICES OFFERED

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Orange	<ul style="list-style-type: none"> <li>Real Fruit Power Orange</li> <li>Real Activ 100% Orange</li> <li>Real Activ Fiber+ Orange Citrus Juice</li> </ul>	The company provides a range of orange juice as part of its citrus fruit juice product portfolio. The products are available in aseptic cartons ranging from 0-200 ml and 1000 ml.	Aseptic Carton
Grape	<ul style="list-style-type: none"> <li>Real Fruit Power Grape</li> </ul>	The company offers grape juice as part of its citrus fruit juice product offerings in 0-200 ml and 500-1000 ml sizes in aseptic cartons.	Aseptic Carton
Sweet lime	<ul style="list-style-type: none"> <li>Real Fruit Power Mosambi</li> </ul>	The company offers sweet lemon fruit juice as part of its diversified product portfolio of citrus fruit juices available in aseptic cartons ranging from 0-200 ml and 500-1000 ml.	Aseptic Carton
Mixed	<ul style="list-style-type: none"> <li>Real Activ Carrot and Orange Juice</li> <li>Real Fruit Power Mixed Fruit</li> <li>Real Activ 100% Mixed Fruit Juice</li> <li>Real Activ Fiber+ Multi Fruit Juice</li> </ul>	The company offers mixed fruit juices from orange and carrot blends made available in aseptic cartons of 500-1000 ml product offerings.	Aseptic Carton

Source: Company Website and Annual Report

### 13.1.2.3 Recent developments

**TABLE 45** DABUR INDIA LIMITED: DEALS

MONTH & YEAR	DEAL TYPE	COMPANY NAME 1	COMPANY NAME 2	DESCRIPTION
August 2020	Partnership	Dabur India Limited (India)	Tetra Pak (Sweden)	Dabur India Limited and Tetra Pak, a Swedish multinational food packaging and processing company, entered into a partnership to launch a new low-calorie juice range in a different packaging format to cater to the growing health-conscious consumers and strengthen their product portfolio of juices.

Source: Company Websites, Company Publications, and Press Releases



**TABLE 46** DABUR INDIA LIMITED: OTHERS

MONTH & YEAR	DEAL TYPE	DESCRIPTION
June 2021	Expansion	The company announced its expansion plans by setting up its largest manufacturing plant in Madhya Pradesh, India, which will allow the company to enhance its production capacity and efficiently cater to the rising demand for its products.

Source: Company Websites, Company Publications, and Press Releases

#### 13.1.2.4 MnM view

Dabur India Limited (India) is one of India's most key recognized food and beverage companies. The company has a strong production base and manufacturing unit spread out across different states in India, which ensures a strong and efficient distribution network. The company also has been establishing partnerships with other players in the industry to strengthen its product portfolio and cater to the rising demand and evolving preferences of customers, such as low calories. This would continue to provide the company with good business opportunities over the forecast period.

##### 13.1.2.4.1 Key strengths/Right to win

The company's strong distribution network and global presence are the key strengths of the company. The company also boasts of strong manufacturing capabilities and a credible reputation in India, due to which the company has a large customer base in the country. The company also offers a strong product portfolio in the citrus fruit juice industry, which includes a wide range of fruit types, such as orange, grapes, sweet lemon, and other mixed fruits, which gives the company an edge over its local rivals in the industry.

##### 13.1.2.4.2 Strategic choices made

The company has focused keenly on enhancing its product portfolio and establishing partnerships with other players in the industry to cater to a larger customer base in India. The company has been focusing on the rising demand originating from health-conscious consumers. It also has expanded its manufacturing and production capabilities in India, which would allow the company to cater to the rising demand of the consumers more efficiently and supplement its growth over the forecasted period.

##### 13.1.2.4.3 Weaknesses and competitive threats

The company's R&D expenditure has been declining in recent years, which can make the company lose out on significant business opportunities in the future with regard to product innovation and new product launches. The food & beverage segment of the company contributes to a marginal portion of the total revenue. The company also has been impacted by the ban imposed on plastic usage by several states. Owing to this, the company may face risk in their sales revenue.

### 13.1.3 ITC LIMITED

#### 13.1.3.1 Business overview

ITC Limited is a conglomerate company based in India. It has a diversified presence across several segments, such as fast-moving consumer goods (FMCG), agri-business, paperboards & packaging businesses, and ITC hotels. The company has 13 different businesses in these four segments and exports its products to over 60 countries across the globe. The company has over 200 manufacturing facilities and has more than 25 FMCG brands under them. The company functions through partnerships with farmers, which enables it to deliver superior value to its customers by enhancing the efficiency of its supply chain management system. Social and environmental concerns are a key part of the company's core business strategies as the company significantly invests in waste management, afforestation, watershed development, education, skill and vocational training, and women empowerment.

The company offers a range of orange fruit juice products as part of its citrus fruit juice product segment through its B Natural brand. The company has a strong retail network of supermarkets, hypermarkets, and convenience stores and services more than seven million retail outlets with its strong distribution network. The company also strongly invests in enhancing its R&D capabilities and has a dedicated team of 350 qualified scientists and state-of-the-art analytics labs. As a result, the company is ranked among the top innovators in India.

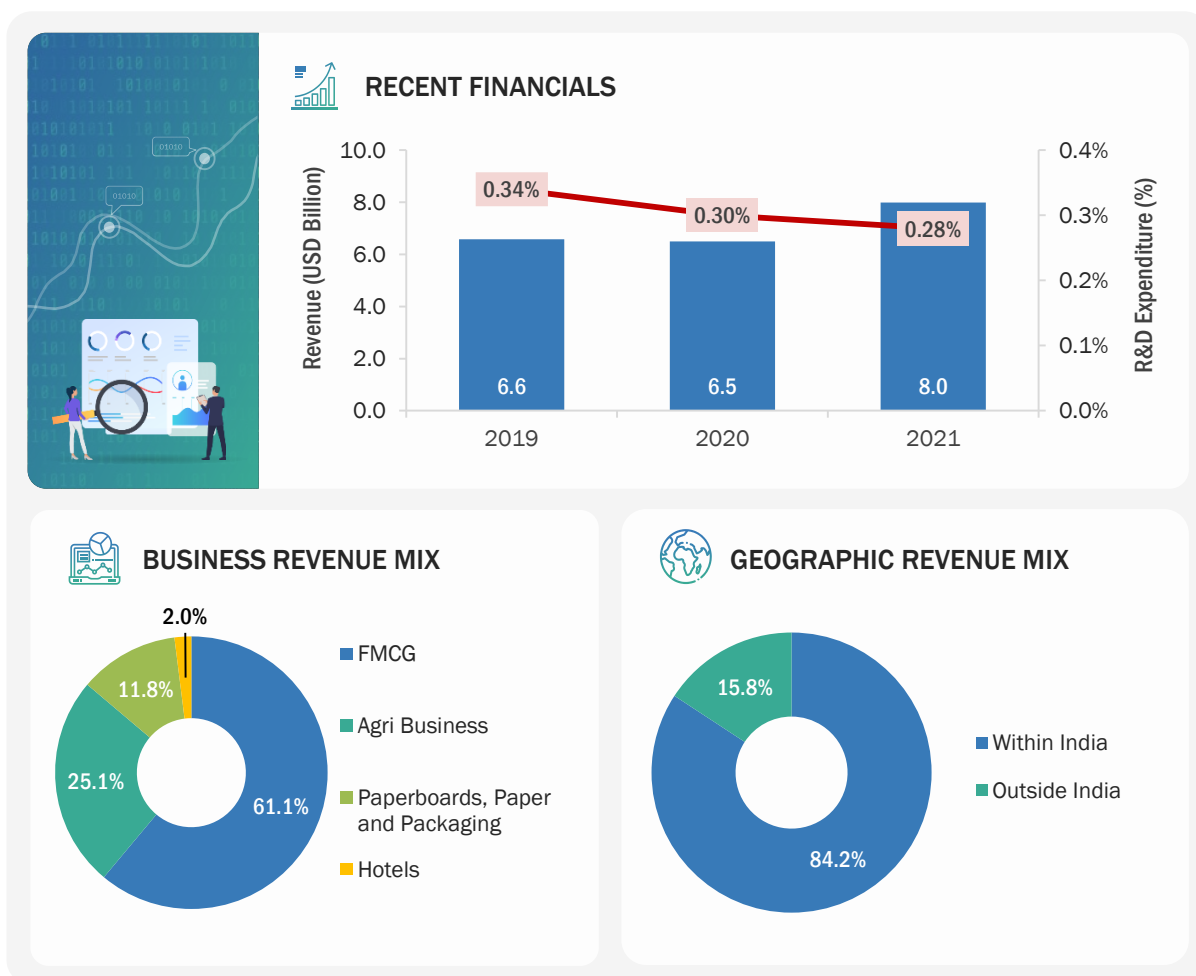
The company faces stiff competition from various key and local players in the Indian citrus fruit juice market. These include PepsiCo (US), Patanjali Ayurved (India), and Smoodies (India).

**TABLE 47** ITC LIMITED: BUSINESS OVERVIEW

ITC LIMITED	
Year	1910
Country	India
City	Kolkata
Total No. of Employees	23,829
Overall Annual Revenue (Global)	USD 8.0 Billion
Annual Revenue (India)	USD 6.7 Billion
Ownership	Public (NSE: ITC)

Source: Company Website and Annual Reports

**FIGURE 32** ITC LIMITED: COMPANY SNAPSHOT



Source: Company Website, Company Publications, and Company Annual Reports

**13.1.3.2 Products/Services/Solutions offered**

**TABLE 48** ITC LIMITED: PRODUCTS/SOLUTIONS/SERVICES OFFERED

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Orange	<ul style="list-style-type: none"> <li>B Natural Orange</li> <li>B Natural Nagpur Orange</li> <li>B Natural Orange +</li> </ul>	The company offers a range of orange juice as part of its citrus fruit juice product offerings, which are made available in pack sizes, such as 0-200 ml and 500-1000 ml.	<ul style="list-style-type: none"> <li>Aseptic Carton</li> <li>Bottles</li> </ul>

Source: Company Website

### 13.1.3.3 Recent developments

**TABLE 49** ITC LIMITED: DEALS

MONTH & YEAR	DEAL TYPE	COMPANY NAME 1	COMPANY NAME 2	DESCRIPTION
November 2021	Partnership	ITC Limited (India)	McDonald's (US)	ITC Limited and McDonald's entered into a strategic partnership to include B-Natural fruits and beverages as part of McDonald's Happy Meal. This strategic initiative was undertaken to achieve more product visibility and enable it to reach a larger number of customers.
May 2020	Partnership	ITC Limited (India)	Amway India (US)	The company entered a strategic partnership with Amway India (US) to launch a new range of B Natural+ fruit juice derived from orange and mixed fruit. This strategic initiative was intended to strengthen its product portfolio and consolidate its market position in the citrus fruit juice market.

Source: Company Websites, Company Publications, and Press Releases

**TABLE 50** ITC LIMITED: NEW PRODUCT LAUNCHES

MONTH & YEAR	COMPANY NAME	PRODUCT TYPE	PRODUCT NAME	DESCRIPTION
December 2021	ITC Limited (India)	PET Beverage	Premium Fruit Beverages	The company launched Premium Fruit Beverages under its B Natural brand in an environmentally friendly recyclable aseptic PET bottle. This new product offering was launched by the company to cater to the demands of modern consumers who demonstrate a high level of awareness toward environmental and personal health.

Source: Company Websites, Company Publications, and Press Releases

### 13.1.3.4 MnM view

ITC Limited is one of the well-established companies catering to the FMCG and agricultural business. It has a strong distribution and retail network that efficiently serves the country. The company also garners a positive perception among the consumers due to its strong focus on social and environmental issues and commands a huge customer base in India, which gives the company a key competitive edge over its rivals. The company has been focusing on establishing partnerships and launching new products to strengthen its product portfolio. It caters to the rising demand of its consumers, which would provide good business opportunities for the company over the forecast period.

#### 13.1.3.4.1 Key strengths/Right to win

The company's core strength is its significant customer base and the reputation it garners in the FMCG and hotels business. The company also invests strongly to enhance its R&D capabilities and has a team of R&D scientists and an analytics lab, which allows the company to innovate its product offerings and cater to the evolving demands of its consumers. The company has a strong distribution network and services seven million retail outlets, giving its products more visibility and an edge over its rivals.

#### 13.1.3.4.2 Strategic choices made

The company has engaged in new product launches. It establishes partnerships with other players in the industry to innovate its product offerings and reach a larger customer base. The company has also been making extensive efforts in launching newer-sized and environmentally friendly packaged bottles for its products, which would appeal to a larger number of consumers who prefer products that are sustainable and healthy for personal usage as well as for the environment. The company's strategic move to partner with McDonald's (US) to include its fruit juice products in its happy meal offerings will continue to increase its product visibility and provide the company with significant business opportunities over the forecasted period.

#### 13.1.3.4.3 Weaknesses and competitive threats

Though the company is one of the most well-known and reputed companies in India in the FMCG sector, it has not got a very strong product portfolio for citrus fruit juice products. Therefore, it faces competition not only from key players but also the large number of local players who are predominantly active in India. The company, despite having a dedicated team of R&D scientists and an analytics lab, has not increased its R&D expenditure in recent years, which can be detrimental for the company in terms of product innovations and new product launches and can negatively affect the company's business revenue.

### 13.1.4 HECTOR BEVERAGES PRIVATE LIMITED

#### 13.1.4.1 Business overview

Hector Beverages Private Limited is one of the key players in the citrus fruit juice industry. The company serves citrus fruit juice products through its 'Paper Boat' brand, which offers mixed citrus fruit juice in various fruit types, such as lemon, mango, and jaggery. The company continuously innovates its product offerings and has expanded its fruit juices from flexible pouches to Tetra Pak cartons.

Hector Beverages Private Limited offers Paper Boat juices in varying package sizes and includes only natural and functional ingredients without artificial flavors or preservatives. Due to this, the company has been able to expand its customer base in recent years owing to heightened awareness from label-conscious consumers. The company particularly adds lemon juice concentrates in its drinks to lower its pH level and prevent the growth of harmful pathogens.

The company faces competition from key players, such as PepsiCo (US), The Coca-Cola Company (US), and ITC Limited (India).

**TABLE 51 HECTOR BEVERAGES PRIVATE LIMITED: BUSINESS OVERVIEW**

HECTOR BEVERAGES PRIVATE LIMITED.	
Year	2009
Country	India
City	Bengaluru
Total No. of Employees	NA
Overall Annual Revenue	NA
Ownership	Private

Source: Company Website

#### 13.1.4.2 Products/Services/Solutions offered

**TABLE 52 HECTOR BEVERAGES PRIVATE LIMITED.: PRODUCTS/SOLUTIONS/SERVICES OFFERED**

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Mixed	<ul style="list-style-type: none"> <li>▪ Paper Boat Panakam</li> <li>▪ Paper Boat Aam Panna</li> </ul>	The company offers a range of mixed citrus fruit juice offerings derived from different fruit types, such as lemon, mango, and powdered jaggery.	Stand-up Pouch

Source: Company Website

### 13.1.4.3 Recent developments

**TABLE 53** HECTOR BEVERAGES PRIVATE LIMITED: DEALS

MONTH & YEAR	DEAL TYPE	COMPANY NAME 1	COMPANY NAME 2	DESCRIPTION
March 2022	Partnership	Hector Beverages Private Limited. (India)	The Script Room (India)	Paper Boat, a brand of Hector Beverages Private Limited, announced 'The Script Room' as its creative partner to co-create the brand's communication initiative and increase the reach of their products to a larger customer base.

Source: Company Websites, Company Publications, and Press Releases

**TABLE 54** HECTOR BEVERAGES PRIVATE LIMITED: OTHERS

MONTH & YEAR	DEAL TYPE	DESCRIPTION
January 2021	Expansion	Hector Beverages Private Limited announced its intention to expand the distribution capabilities of its 'Paper Boat' brand by launching products that would be available only on its online platforms and expanding the distribution capabilities of its convenience stores to reach a larger number of customers.
March 2019	Investment	The company received an investment worth USD 1.45 million from A91 Partners (India) as part of its investment plans in Series-B stage startups. The company intended to use this investment to expand its business in healthy beverage products.

Source: Company Websites, Company Publications, and Press Releases

### 13.1.4.4 MnM view

The company strongly focuses on innovative product offerings in the citrus fruit juice industry. It also garners a positive perception among the consumers for its usage of natural and traditional Indian ingredients in all its fruit juice products and refraining from using artificial flavors and preservatives. Owing to this, the company has gained a strong customer base in recent years and has reported a significant growth in every financial year compared to the previous year.

#### 13.1.4.4.1 Key strengths/Right to win

The company's positive reputation for using natural ingredients in its fruit juice offerings has been one of its key strengths. Due to this, the company has gained a significant customer base in recent years, which has also made the company a key player in the citrus fruit juice industry. The company has also been focusing keenly on enhancing its communication strategy and packaging to reach a larger number of customers that drive the brand's growth.

#### 13.1.4.4.2 Strategic choices made

The company has enhanced its distribution capabilities and expanded its network of convenience stores, which increased its customer base, contributing to the overall profitability of the company significantly. The company has also received a significant investment from A91 Partners (India), which would allow the company to continue to drive its business growth in the health beverages and citrus fruit juice markets, which would continue to present significant business opportunities for the company over the forecasted period.

#### 13.1.4.4.3 Weaknesses and competitive threats

The company's citrus fruit juice product offerings are very limited and can be a significant threat for the company, as its products can be easily substituted by other local and key players operating in the industry. The company was also severely impacted by the global pandemic as it reported significant losses in the financial year 2020 after the company decided to strengthen its product portfolio.



### 13.1.5 PATANJALI AYURVED

#### 13.1.5.1 Business overview

Patanjali Ayurved is an Indian-based multinational conglomerate company that caters to different industries, such as natural health care, natural food products, ayurvedic medicine, herbal home care, natural personal care, and nutraceuticals, among others. The company offers orange, sweet lime, and lemon drinks as part of its natural health care products through its website and other e-commerce websites, along with various supermarkets, hypermarkets, convenience stores, and retail outlets as their sales channels.

The company also exports herbal and natural products, including health supplements, beverages, cosmetics, processed foods, and personal & home care products across the continents. The company focuses strongly on R&D and quality and has state-of-the-art laboratories for ascertaining and maintaining the quality of its products. The company has also received quality certificates, such as ISO9001:2008, ISO14001:2004, BS OHSAS 18001:2007, GMP, and FSSAI certifications.

The company faces competition from many key and local players operating in the Indian citrus fruit juice industry. These players include ITC Limited (India), SHUNYA (India), and Dabur India Limited (India).

**TABLE 55 PATANJALI AYURVED: BUSINESS OVERVIEW**

PATANJALI AYURVED	
Year	2006
Country	India
City	Haridwar
Total No. of Employees	5,176
Overall annual revenue (2020-21)	USD 1.3 billion
Ownership	Debt-listed Public Company

Source: Company Website and Annual Reports

#### 13.1.5.2 Products/Services/Solutions offered

**TABLE 56 PATANJALI AYURVED: PRODUCTS/SOLUTIONS/SERVICES OFFERED**

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Orange	Patanjali Orange Juice	The company offers orange juice as part of its citrus fruit juice product offerings in 0-200 ml and 501-1000 ml aseptic cartons.	Aseptic Carton
Lemon	Patanjali Lemon Drink	The company offers lemon drinks in its natural health care fruit beverages in 201-500 ml bottles.	Bottle
Sweet lime	Patanjali Mosambi Drink	The company offers sweet lime drinks as part of its product portfolio in 201-500 ml bottles.	Bottle

Source: Company Website

### 13.1.5.3 Recent developments

**TABLE 57** PATANJALI AYURVED: OTHERS

MONTH & YEAR	DEAL TYPE	DESCRIPTION
July 2021	Investment	Patanjali Ayurved (India) announced its plans to invest USD 1.35 billion by 2025 to support the company's aggressive expansion plans and bolster its R&D capabilities.
March 2019	Expansion	The company increased its workforce by hiring 738 management professionals to supplement its aggressive expansion plans to double its retail outlets in India. The company intended to reach 10,000 retail outlets with this strategic initiative to reach a larger customer base.

Source: Company Websites, Company Publications, and Press Releases

### 13.1.5.4 MnM view

Patanjali Ayurved (India) is well-known for its emphasis on products that improve personal health. It strongly emphasizes quality control and has a range of certifications. The company has been continually focusing on aggressively expanding its market presence in India by investing in R&D and strengthening its distribution network, which is likely to provide the company with good business opportunities over the forecasted period.

#### 13.1.5.4.1 Key strengths/Right to win

The company's focus on health-based products has been its core strength. Due to this, its products have gained significant traction in the market in recent years. Owing to this, the company has recently reported its highest revenue in years. It has continuously focused on aggressively expanding its market presence in India by investing in R&D capabilities and increasing its workforce, and expanding its retail outlets, which will continue to give the company significant business opportunities over the forecasted period.

#### 13.1.5.4.2 Strategic choices made

The company has been offering its citrus fruit juice product as part of its natural health care products segment. The company's investments in expansion plans and R&D capabilities will enable it to consolidate its position as a key player in the Indian citrus fruit juice industry. The company's strong focus on quality and extensive efforts to reach a larger customer base by doubling its retail outlets in the Indian market is likely to give the company a strong edge over its rivals over the forecasted period.

#### 13.1.5.4.3 Weaknesses and competitive threats

The company's citrus fruit juice products are limited to only lemon and orange juices, which can pose a significant risk for the company from other players with a stronger product portfolio; these players include PepsiCo (US) and Dabur India Limited (India). Also, the credibility of the company's reputation was compromised when its Amla juice product offering was declared unfit for consumption by Canteen Stores Department (CSD). The company predominantly operates in India and does not offer much product differentiation, due to which it faces stiff competition from a large number of local and unorganized players in the market.

## 13.1.6 THE COCA-COLA COMPANY

### 13.1.6.1 Business overview

The Coca-Cola Company is one of the key players in the beverage industry. The company has many popular brands with which it caters to the global beverage markets, such as Sprite, Minute Maid, Simply, Fresca, and innocent, among others. The various segments under which the company offers its beverage include Trademark Coca-Cola, sparkling flavors, hydration sports coffee & tea, nutrition, juice, dairy & plant-based beverages, and emerging beverages. The company caters to the Indian citrus fruit juice market with a strong product portfolio, which it offers under the 'Minute Maid' brand. The company has very strong manufacturing and distribution capabilities, which include 225 bottling partners, 900 bottling plants, and 30 million retail customer outlets all over the world.

The company has a strong geographical presence in more than 200 countries across the major regions, namely North America, Europe, Asia Pacific, South America, and the Middle East and Africa. The company is also making extensive efforts to enhance its R&D capabilities in India to cater to the evolving demands of the large population in the country. The company operates directly with farmers in key sourcing regions, which enables it to overcome material issues in its agricultural supply chain.

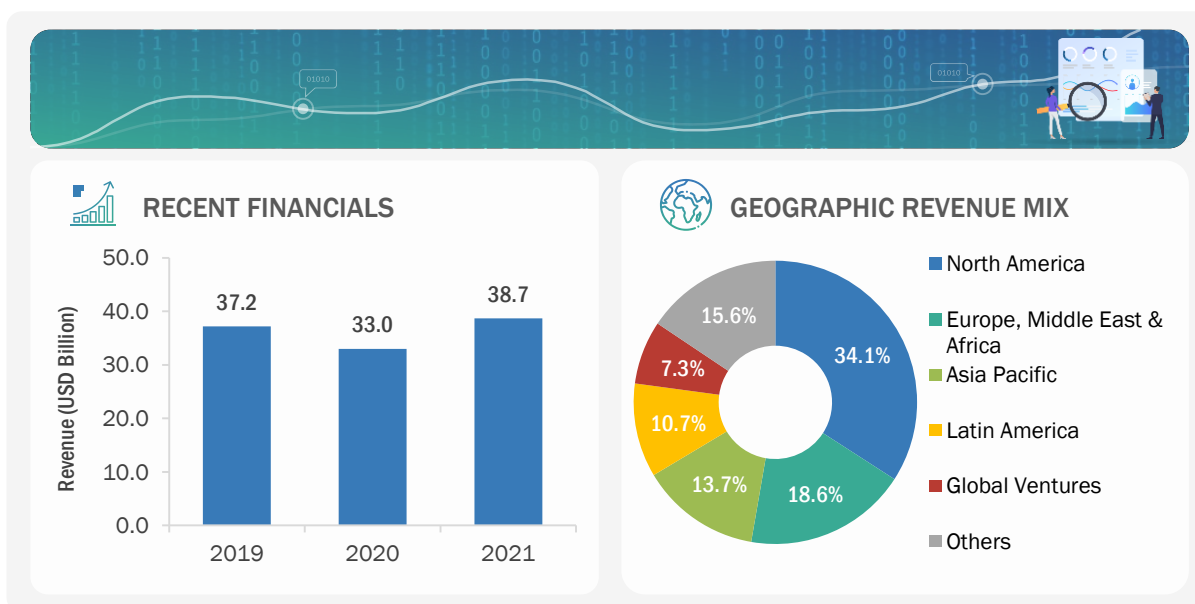
The company's main rivals in the Indian citrus fruit juice market are PepsiCo (US), Dabur India Limited (India), and ITC Limited (India).

**TABLE 58 THE COCA-COLA COMPANY: BUSINESS OVERVIEW**

THE COCA-COLA COMPANY	
Year	1892
Country	US
City	Atlanta, Georgia
Total No. of Employees	~79,000
Overall Annual Revenue (Global)	USD 38.7 Billion
Ownership	Public (NYSE: KO)

Source: Company Website and Annual Reports

**FIGURE 33 THE COCA-COLA COMPANY: COMPANY SNAPSHOT**



Source: Company Website, Company Publications, and Company Annual Reports

### 13.1.6.2 Products/Services/Solutions offered

**TABLE 59 THE COCA-COLA COMPANY: PRODUCTS/SOLUTIONS/SERVICES OFFERED**

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Orange	<ul style="list-style-type: none"> <li>Minute Maid Vita Punch – Citrus Splash</li> <li>Minute Maid Pulp – Orange</li> </ul>	The company offers two orange juices as part of its product portfolio. The products are available in aseptic cartons and bottles, respectively.	<ul style="list-style-type: none"> <li>Bottle</li> <li>Aseptic Carton</li> </ul>

Source: Company Website

### 13.1.6.3 Recent developments

**TABLE 60 THE COCA-COLA COMPANY: OTHERS**

MONTH & YEAR	DEAL TYPE	DESCRIPTION
August 2022	Expansion	The Coca-Cola Company announced its expansion plans through new product launches under its 'Minute Maid' brand, which caters to a larger customer base and enhances its brand visibility.
March 2019	Expansion	The company announced its intention to expand in the Indian market by establishing R&D centers in India. This strategic initiative was undertaken to develop India as one of the top three markets for the company.

Source: Company Website

#### 13.1.6.4 MnM view

The Coca-Cola Company is one of the key players in the global beverage industry. The company commands a large customer base in India and other countries, which makes it one of the key players in the citrus fruit juice and other beverage categories. The company has also been focusing keenly on enhancing its product portfolios and R&D capabilities to cater efficiently to the evolving taste and preferences of the Indian consumer, which is likely to support the company's growth over the forecasted period. Recently, the company has also established partnerships with popular fast-food chains, such as McDonald's (US), to include its juice products in the McDonald's meal packages, which enables the company to enhance its brand visibility. The company's strong distribution network enables easy access across the retail chains, such as supermarkets, hypermarkets, convenience stores, and on the e-commerce platform, which is among the key strengths of the company.

## 13.1.7 SMOODIES

### 13.1.7.1 Business overview

Smoodies is a producer and distributor of fruit juices, smoothies, and coconut water. The company provides orange and other mixed fruit juices as part of its citrus fruit juice product portfolio. The juices are available in glass bottles of sizes 0-200 ml and 500-1000 ml. The company distributes its products through its website as well as other popular e-commerce platforms along with supermarket and hypermarket chains and across hotels, restaurants, cafes, and other institutions. It also takes extensive care in making its glass bottles completely eco-friendly and usage of free-from artificial colors, flavors, sugar, or preservatives in its product offerings. The company lays strong emphasis on quality control and food safety management. Its company's manufacturing facility is ISO-22000 certified.

The company focuses strongly on using clean-label products and lays a strong emphasis on catering to the increasingly health-conscious consumers in the country. It operates in the Indian citrus fruit juice industry in partnership with popular food & beverage delivery companies, such as Swiggy (India), EatFit (India), and other grocery chains, such as Simpli Namdhari's (India), which further strengthens its market position and distribution network in the Indian citrus fruit juice industry.

**TABLE 61** SMOODIES: BUSINESS OVERVIEW

SMOODIES	
Year	2004
Country	India
City	Hyderabad
Total No. Of Employees	NA
Overall Annual Revenue	NA
Ownership	Private

Source: Company Website

### 13.1.7.2 Products/ Services/ Solutions offered

**TABLE 62** SMOODIES: PRODUCTS/SOLUTIONS/SERVICES OFFERED

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Orange	Original Orange Juice	The company offers orange juice as part of its citrus fruit juice product offerings; the products are available in glass bottles of sizes 0-200 ml and 1000 ml.	Glass Bottle
Mixed	Tulsi Lemonade	The company offers tulsi lemonade, a mixed citrus fruit juice product offering made from tulsi and lemon juice. It is available in packs of 0-200 ml and 1000 ml glass bottles.	Glass Bottle

Source: Company Website

### 13.1.7.3 Recent developments

**TABLE 63** SMOODIES: OTHERS

MONTH & YEAR	DEAL TYPE	DESCRIPTION
November 2019	Expansion	In November 2019, the company announced its expansion plans in the Indian citrus fruit juice market by increasing its production capacity to 10,000 bottles per day from 2,500 bottles per day to aggressively expand its customer base and consolidate its market position in the industry.

Source: Company Websites, Company Publications, and Press Releases

### 13.1.7.4 MnM view

The company's strong focus on quality control and safety management of its products has gained significant traction in the market, especially from the increased health and environmentally conscious consumers in the country. The company also has a strong distribution network in the country and distributes its products through hotels, restaurants, cafes, and other institutions. It has established partnerships with leading food delivery companies operating in the Indian market. These companies include Swiggy (India), EatFit (India), and popular grocery chains, such as Simpli Namdhari's (India). The company can look to enhance its product portfolio by investing more in its R&D capabilities, which would give the company a stronghold in the industry.

## 13.1.8 DEL MONTE FOODS, INC.

### 13.1.8.1 Business overview

Del Monte Foods, Inc. is a US-based food production and distribution company. It is one of the largest producers, distributors, and marketers of processed food products for the retail market in the US. The company is one of the key producers of food & beverage products in the Indian market. Its products include Italian products, sauces, dips & spreads, fruit drinks, and packaged fruit and vegetables. The company also has a strong presence in the Indian market, with offices across cities and states, such as Haryana, Tamil Nadu, Karnataka, and Maharashtra. The company offers mixed citrus fruit juices as part of its product offerings. The country also has a significant geographical presence across all the major regions, namely North America, Europe, Asia Pacific, South America, and the Middle East and Africa. The company operates through a network of farmers and has various community farms.

The company also focuses strongly on quality control and uses Non-GMO and Non-BPA products with a strong emphasis on growing the best quality vegetables and fruits. Some of the prominent subsidiaries of the company include College Inn Foods (US), Galapesca SA (Ecuador), Contadina Foods Inc (US), Sager Creek Foods, Inc (US), and Marine Trading Pacific Inc (US).

The company faces stiff competition from various key and local players operating in the Indian fruit juice industry; these players are PepsiCo (US), Stora Foods (India), and HealthySip (India).

**TABLE 64 DEL MONTE FOODS, INC: BUSINESS OVERVIEW**

DEL MONTE FOODS, INC.	
Year	1886
Country	US
City	Walnut Creek, California
Total No. of Employees	NA
Overall Annual Revenue	NA
Ownership	Private

Source: Company Website

### 13.1.8.2 Products/Services/Solutions offered

**TABLE 65 DEL MONTE FOODS, INC: PRODUCTS/SOLUTIONS/SERVICES OFFERED**

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Mixed	<ul style="list-style-type: none"> <li>▪ Four Seasons Mixed Fruit Drink</li> <li>▪ Pineapple Orange Fruit Drink</li> </ul>	The company offers a range of mixed fruit drinks as part of its citrus fruit juice product offerings available in 200-500 ml cans.	Can

Source: Company Website

### 13.1.8.3 Recent developments

There have been no recent developments during the period considered for this study.



#### 13.1.8.4 MnM view

Del Monte Foods, Inc. is likely to retain its position as one of the key players in the Indian citrus fruit juice industry because of its strong retail and distribution network. The company has a well-established customer base; a strong focus on quality control has been one of the key causes that have attracted a larger number of customers to the company in recent years. The company's offerings in the Indian citrus fruit juice industry are limited to the mixed fruit drinks category. The company has also been focused on addressing the evolving demands of its large customer base in India by engaging in new product launches and innovating its product offerings, which is likely to contribute to its growth over the forecasted period.

### 13.1.9 RUS ORGANIC

#### 13.1.9.1 Business overview

Rus Organic is among India's first cold-pressed juice companies offering a range of lemon and mixed fruit juices for the Indian citrus fruit juice Industry. The company focuses on the usage of natural ingredients in its products and has been able to establish a strong distribution network across India in recent years due to growing acceptance among consumers. The company functions in partnerships with key supermarkets and retail chains, such as Big Basket (India), Borkars Super Stores, and Wellness Forever (India).

The company is also among the few companies that have received the USDA Certified Organic certification due to the usage of completely organic and non-GMO ingredients in their products. The company produces cold-pressed fruit juices that are free from allergens, such as gluten, dairy, and other additives, and are 100% vegan. The company uses a high-pressure processing system instead of preservatives that stagnates the growth of bacteria and degradation process and helps in the extension of the shelf life of their juices.

**TABLE 66 RUS ORGANIC: BUSINESS OVERVIEW**

RUS ORGANIC	
Year	2018
Country	India
City	Bhiwandi
Total No. of Employees	NA
Overall annual revenue	NA
Ownership	Private

Source: Company Website

#### 13.1.9.2 Products/Services/Solutions offered

**TABLE 67 RUS ORGANIC: PRODUCTS/SOLUTIONS/SERVICES OFFERED**

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Lemon	Onyx – Organic Charcoal Lemonade	The company offers lemonade derived from lemons as part of its citrus fruit juice product offerings in bottles that are available in pack sizes of 0-200 ml and 201-500 ml.	Bottle
Mixed	Organic Detox Juice	The company offers organic detox juice that contains sugarcane, lemon, and mint as part of its citrus fruit juice product offerings in bottle sizes of 0-200 ml.	Bottle
Mixed	Zest – Organic Sugarcane Juice	The company offers organic sugarcane juice that contains sugarcane, lemon, and mint as part of its ingredients available in bottle sizes of 0-200 ml and 201-500 ml.	Bottle

Source: Company Website

#### 13.1.9.3 Recent developments

There have been no recent developments during the period considered for this study.

#### 13.1.9.4 MnM view

Rus Organic is one of the few companies that use all-natural, organic, and non-GMO ingredients in its product offerings for the Indian market. The company's strong focus on offering quality and allergen-free ingredients in its products is likely to gain significant traction in the market over the forecasted period due to the rise in health and label-conscious consumers in India. The company has also been functioning in partnership with some of the top retail and supermarket chains operating in India, which has enhanced the distribution network of the company, which is also likely to continue a significant business opportunity for the company over the forecasted period.

### 13.1.10 RAKYAN BEVERAGES

#### 13.1.10.1 Business overview

Rakyan Beverages is a beverage production company that offers coconut water, juices, almond milk, and blends. The company is a subsidiary of Wingreens Farms (India), a food company that is one of the market leaders in the fresh dips and pita chips category. The company uses online e-commerce channels, supermarket chains, and local gourmet food stores in leading metropolitan cities, such as Delhi NCR, Mumbai, Bengaluru, and Pune, as its sales and distribution channels. Wingreens Farms has also been investing heavily in its growth strategies to expand its geographical presence across India and enhance its sales channels and explore newer customer segments.

Rakyan Beverages provides a range of orange, grape, and mixed fruit juices as part of its citrus fruit juice product offerings under its RAW Pressery brand. The company offers its juice products in varying pack sizes, such as 1000 ml, 250 ml, 200 ml, and bulk packages, which cater to a range of customers according to their specific requirements. The company also operates in the Middle Eastern countries, such as UAE, Qatar, Kuwait, Bahrain, and Oman.

**TABLE 68 RAKYAN BEVERAGES: BUSINESS OVERVIEW**

RAKYAN BEVERAGES	
Founded	2013
Country	India
City	Mumbai
Total No. of Employees	NA
Overall annual revenue	NA
Ownership	Private

Source: Company Website

#### 13.1.10.2 Products/Services/Solutions offered

**TABLE 69 RAKYAN BEVERAGES: PRODUCTS/SOLUTIONS/SERVICES OFFERED**

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Orange	Raw Pressery Valencia Orange Juice	The company offers orange juice as part of its citrus fruit juice product offerings available in bottle sizes of 200-500 ml and 500-1000 ml.	Bottle
Grape	Raw Pressery Grapefruit Juice	The company offers grapefruit juice as part of its citrus fruit juice product portfolio in bottle sizes 200-500 ml and 500-1000 ml.	Bottle
Mixed	<ul style="list-style-type: none"> <li>▪ Raw Pressery Mixed Fruit Juice</li> <li>▪ Raw Pressery Aloe Vera Lemonade</li> <li>▪ Raw Pressery Flush</li> <li>▪ Raw Pressery Lean Juice</li> </ul>	The company has a host of mixed fruit juices derived from different fruit types, such as lemon, mango, guava, sugarcane, apple, beetroot, and carrot, made available in bottles of varying sizes, such as 0-200 ml, 201-500 ml, and 500-1000 ml.	Bottle

Source: Company Website

### 13.1.10.3 Recent developments

**TABLE 70** RAKYAN BEVERAGES: OTHERS

MONTH & YEAR	APPROACH	DESCRIPTION
January 2022	Expansion	Rakyan Beverages (India) expanded its bottle range to limited edition 'Spiderman: No Way Home' bottles, which was one of the biggest movie releases of 2021. This strategic initiative was undertaken to enhance its brand visibility and expand its customer base by making its bottles more appealing to a larger number of consumers.
November 2021	Expansion	Wingreen Farms (India), the parent company of Rakyan Beverages (India), announced its aggressive expansion plans to further grow in the Indian citrus fruit juice market after it received investment from Investcorp (Bahrain) and Omidyar Network (US) by onboarding new food and beverage brands to consolidate its market position in the industry.

Source: Company Website

### 13.1.10.4 MnM view

Raw Pressery, a brand of Rakyan Beverages, has been gaining significant traction in the market in recent years because of the strong distribution and retail network that the company has established with supermarket, e-commerce, and gourmet food store chains. The company has also focused on extensive efforts in making its products more appealing to a larger customer base by modifying its packaging and bringing out limited edition bottles based on popular movies and themes, which has also enhanced the brand visibility of the company further. The company also has a relatively strong product portfolio of products offered in different pack sizes to cater to a different sets of customers according to their specific requirements.

## 13.2 OTHER PLAYERS

### 13.2.1 STORIA FOODS

#### 13.2.1.1 Business overview

Storia Foods operates in the manufacturing and marketing of shakes, juices, coconut water, and beverage whitener. The company offers lemon juice products as part of its citrus fruit juice segment that is made available in bottles of sizes 0-200 ml. The company differentiates its products by offering immunity-boosting antioxidants in its juice products and lays a strong emphasis on enhancing its R&D capabilities to innovate its products and cater to the evolving demand of the large population in India.

The company has a strong geographical presence across 33 cities and distributes its products to more than 50,000 retail outlets in India. During the pandemic, the company also expanded its online sales channels to target large numbers of consumers, as they were shifting toward online e-commerce platforms for purchasing various food & beverage items. The company has also been investing heavily in digital marketing and has announced its plans to launch natural juices to support its aggressive growth plans and appeal to a larger customer base who are much more health and label conscious.

**TABLE 71** STORIA FOODS: BUSINESS OVERVIEW

STORIA FOODS	
Founded	2017
Country	India
City	Mumbai
Total No. of Employees	NA
Overall Annual Revenue	NA
Ownership	Private

Source: Company Website

#### 13.2.1.2 Products/Services/Solutions offered

**TABLE 72** STORIA FOODS: PRODUCTS/SOLUTIONS/SERVICES OFFERED

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Lemon	100% Juice – Nimbu Pani	The company offers lemon drinks as part of its product portfolio; it is available in bottles of 0-200 ml.	Bottle

Source: Company Website

### 13.2.1.3 Recent developments

**TABLE 73** STORIA FOODS: OTHERS

MONTH & YEAR	DEAL TYPE	DESCRIPTION
October 2021	Expansion	The company announced a plan to enhance its product portfolio and strengthen its distribution network after it received investment from Sixth Sense Ventures (India) in a Series A round.

Source: Company Websites, Company Publications, and Press Releases

### 13.2.1.4 MnM view

Storia Foods commands a strong distribution network of supermarket and retail chains, which is one of the core strengths of the company. The company has recently raised an investment worth 6 million dollars and has announced to expand its product portfolio and distribution network across the country. The company has also announced its intentions of launching healthier product offerings and natural juices that would gain significant traction from modern consumers who are highly aware and label conscious. The company has also been focusing strongly on R&D to innovate its product offerings and investing significantly in digital marketing, which has contributed to the company's growth in recent years.

## 13.2.2 SPOORTHY ORGANIC FARMERS

### 13.2.2.1 Business overview

Spoorthy Organic Farmers is a producer of detox, cleanse, and fresh juices. The company also caters to other product categories, such as organic milk and milk products, healthy and nutritious food, organic grains and whole seeds, organic whole pulses and dals, and fruits. The company offers a range of organic fresh citrus juices as part of its product portfolio targeted toward detoxification and cleansing the body. The company's product offerings are 100% vegan and free from allergens such as gluten.

The company uses its website as an e-commerce platform and sales channel to reach its target consumers. The company also operates through a network of retail chains across different cities in India, where the company distributes its products at a discounted price to its retail partners.

**TABLE 74 SPOORTHY ORGANIC FARMERS: BUSINESS OVERVIEW**

SPOORTHY ORGANIC FARMERS	
Founded	2015
Country	India
City	Pune
Total No. of employees	NA
Overall annual revenue	NA
Ownership	Private

Source: Company Website

### 13.2.2.2 Products/Services/Solutions offered

**TABLE 75 SPOORTHY ORGANIC FARMERS: PRODUCTS/SOLUTIONS/SERVICES OFFERED**

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Orange	Orange Kavach Cold Pressed Organic Fresh Juice	The company offers orange juice as part of its citrus fruit juice product offerings that are made available in bottle sizes of 0-200 ml.	Glass Bottle
Mixed	<ul style="list-style-type: none"> <li>▪ Red Kavach Cold Pressed Organic Fresh Juice</li> <li>▪ Green Treasury Cold Pressed Organic Fresh Juice</li> <li>▪ Morning Love Cold Pressed Organic Fresh Juice</li> <li>▪ Men Kavach Cold Pressed Organic Fresh Juice</li> <li>▪ Women Kavach Cold Pressed Organic Fresh Juice</li> </ul>	The company has a range of mixed fruit juice products that cater to the citrus fruit juice market and are made available in bottle sizes of 0-200 ml.	Glass Bottle

Source: Company Website

### 13.2.2.3 Recent developments

There have been no recent developments during the period considered for this study.



#### 13.2.2.4 MnM view

Spoorthy Organic Farmers has a significant growth opportunity over the forecasted period as it offers completely allergen-free ingredients in its products and brands them as detoxifying juices that enhance the body's immunity, which is likely to gain significant traction in the market. The company also has a relatively strong product portfolio that offers a range of different mixed fruit and orange juices which is one of the company's core strengths.

One major limitation of the company is that it does not rely on supermarkets and hypermarkets to distribute its products.

### 13.2.3 AXIOM AYURVEDA PVT. LTD.

#### 13.2.3.1 Business overview

Axiom Ayurveda Pvt., Ltd., is engaged in manufacturing various products, such as ayurvedic saras, fruit juices, beauty & personal care, health supplements, mocktails, oils, and tea. The company has a state-of-the-art manufacturing facility located in the Indian city of Ambala, which produces more than 100 types of herbal and fruit juices. The company offers a range of mixed fruit juices as part of its citrus fruit juice portfolio. The company has a healthy customer retention rate as it strongly focuses on using only natural ingredients and fertilizers in all of its juice products, which appeals to modern consumers who demonstrate high awareness regarding personal health.

The company focuses strongly on quality control and accounts among the few Indian companies that produce all of its products organically. The company's main production facility has also been accredited with certifications, such as ISO 22000:2005, WHO-GMP, and FSSAI, among others, for its emphasis on food safety and quality control. The company has global acceptance in various countries and has also been declared a winner of the top 100 SMEs of India in 2019.

**TABLE 76** AXIOM AYURVEDA PVT. LTD.: BUSINESS OVERVIEW

AXIOM AYURVEDA PVT. LTD.	
Founded	1995
Country	India
City	Ambala
Total No. of Employees	NA
Overall Annual Revenue	NA
Ownership	Private

Source: Company Website

#### 13.2.3.2 Products/Services/Solutions offered

**TABLE 77** AXIOM AYURVEDA PVT. LTD.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Mixed	<ul style="list-style-type: none"> <li>▪ Orange Alovera Juice</li> <li>▪ Mosambi Alovera Juice</li> <li>▪ Mixed Fruit Alovera Juice</li> </ul>	<p>The company offers a range of mixed fruit juices as part of its citrus fruit juice portfolio. The juices are produced from various ingredients, such as orange, sweet lemon, aloe vera, apricot, and apple. They are available in bottle sizes of 0-200 ml, 201-500 ml, and 1000 ml.</p>	Bottle

Source: Company Website

#### 13.2.3.3 Recent developments

There have been no recent developments during the period considered for this study.

#### 13.2.3.4 MnM view

Axiom Ayurveda Pvt., Ltd. is expected to capture a dominant share in the Indian citrus fruit juice industry owing to its strong focus on the usage of natural and organic ingredients in its product portfolio. Furthermore, its emphasis on quality control and good manufacturing practices appeals to modern consumers who demonstrate high awareness regarding personal health and labels of food and beverage products.

## 13.2.4 DOLE PLC

### 13.2.4.1 Business overview

Dole PLC is a US-based multinational company engaged in producing fruits, fresh vegetables, packaged salads, and organic salads. In July 2021, Total Produce PLC completed the acquisition of the remaining 55% share of Dole Food Company, Inc. to create Dole PLC. The company serves in the Asian market with the name of Dole Sunshine Company, which is used to represent the global interests and combined efforts of Dole Asia Holdings, Dole Worldwide Packaged Foods, and Dole Asia Fresh. It is not an actual business entity and does not operate as such in any country or region.

In the Indian market, the company offers mixed citrus fruit juices as part of its beverage portfolio, available in cans. The company has a strong geographical presence across all the major regions in 32 countries around the world and has been operating in the Indian citrus fruit juice market since 2019, where it has expanded significantly in recent years and has achieved a significant customer base. Furthermore, the company has announced plans to expand its distribution channels through HORECA and other industrial segments. It has been investing significantly in advertisement and marketing activities to enhance its brand visibility in India. The company lays a strong emphasis on R&D, product innovations, and enhancements of distribution capabilities to make its products more accessible to a larger population worldwide. It has expanded into newer markets in recent years, which enables the company to capture a dominant share in the global market. The company has also been focusing on making its operations more sustainable for the environment by engaging in zero fossil-based plastic packaging, zero carbon, and zero fruit loss practices.

**TABLE 78 DOLE PLC: BUSINESS OVERVIEW**

DOLE PLC	
Founded	1851 (Dole Food Company, Inc.)
Country	US
City	Thousand Oaks, CA
Total No. of Employees	NA
Overall Annual Revenue	USD 9.3 Billion
Ownership	Public (NYSE: DOLE)

Source: Company Website

### 13.2.4.2 Products/Services/Solutions offered

**TABLE 79 DOLE PLC: PRODUCTS/SOLUTIONS/SERVICES OFFERED**

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Mixed	<ul style="list-style-type: none"> <li>Dole Real Fruit Juice (Pineapple Orange Banana)</li> <li>Dole Real Fruit Juice (Pineapple Orange)</li> </ul>	The company offers a range of mixed citrus fruit juices as part of its product portfolio. The products are available in cans of pack sizes 200-500 ml.	Cans

Source: Company Website

### 13.2.4.3 Recent developments

There have been no recent developments during the period considered for this study.

#### 13.2.4.4 MnM view

Dole PLC works in partnership with a large number of organizations and companies around the world. It has a huge geographical presence and market access in India and abroad, which are among the core strengths of the company. In July 2021, the company announced that it wants India to contribute to 10% of its Asia business in the next three years and 25% of its Asia business in the next five years. To facilitate these aggressive growth strategies, the company has announced its intention to engage in new product launches in the future, which would cater to all the consumers in the upper, middle, and lower segments and will also look to enhance its distribution channels in HORECA and other industrial segments at a later stage, which will give the company a key competitive edge over its rivals.

## 13.2.5 HEALTHYSIP

### 13.2.5.1 Business overview

HealthySip is engaged in manufacturing juices by using cold-pressed technology, which facilitates the preservation of natural nutrients in veggies and fruits essential for the human body in providing minerals, such as iron, calcium, and magnesium. Apart from cold-pressed juices, the company also offers healthy salads, vegan products, and dry fruits & seeds. The company uses its website as an e-commerce platform for its product distribution and has established its retail outlets in Pune, Mumbai, and Ahmedabad.

The company offers orange juice as part of its citrus fruit juice product portfolio, which is labeled as a health juice. The company operates through a network of farmers and engages in organic farming and restricts the usage of artificial colorings and taste enhancers in its products, which results in producing superior quality and nutrient-rich products. Owing to this, the company has been able to gain significant importance from a large number of health-conscious consumers in recent years.

**TABLE 80** HEALTHYSIP: BUSINESS OVERVIEW

HEALTHYSIP	
Founded	2018
Country	India
City	Pune
Total No. of Employees	NA
Overall Annual Revenue	NA
Ownership	Private

Source: Company Website

### 13.2.5.2 Products/Services/Solutions offered

**TABLE 81** HEALTHYSIP: PRODUCTS/SOLUTIONS/SERVICES OFFERED

FRUIT TYPE	PRODUCT NAME	DESCRIPTION	PACK TYPE
Orange	Orange Juice	The company offers orange juice as part of its citrus fruit juice product portfolio; the products are made available in glass bottles of sizes 0-200 ml.	Glass Bottle
Others	Amla Juice	The company offers amla juice in glass bottles of sizes 0-200ml.	Glass Bottle

Source: Company Website

### 13.2.5.3 Recent developments

There have been no recent developments during the period considered for this study.

#### 13.2.5.4 M nM view

Although HealthySip is considered to be one of the emerging companies in the fruit juice industry, its product offerings in the citrus fruit juice industry are very limited. The company needs to enhance its product portfolio to counteract the stiff competition posed by the industry's key and various local players. The company may focus on increasing its pack size offerings and extend them to different sizes that can cater to a larger customer base. The company may also focus on strengthening its retail network by establishing outlets in other states and cities and enhancing its distribution network through hypermarket and supermarket chains. The company's strong focus on the quality of ingredients and organic farming practices is likely to contribute to its significant growth over the forecasted period.

## 14 APPENDIX

### 14.1 DISCUSSION GUIDE

**Q. 1. Please provide your views on the growth prospects of the Indian citrus fruit juices market. What is the current market scenario, and how is it projected to change in the future?**

Primary source's viewpoint: \_\_\_\_\_

**Q. 2. What are your views on the impact of COVID-19 on the citrus fruit juices market?**

Primary source's viewpoint: \_\_\_\_\_

**Q. 3. Can you provide information on the value chain of citrus fruit juices in India?**

Primary source's viewpoint: \_\_\_\_\_

**Q. 4. Can you provide information on the ratio of manufacturing versus import of citrus fruit juices in India? Do the retailers import citrus juices directly or through distributors?**

Primary source's viewpoint: \_\_\_\_\_

**Q. 5. Based on our research, the citrus fruit juices market has been segmented below. Please validate the segmentation.**

TYPE	FRUIT TYPE	PACK SIZE	DISTRIBUTION CHANNEL	PACK TYPE
Fruit Drinks	Orange	0–200 ml	Convenience Stores	Bottles
100% Fruit Juice (NFC)	Lime/lemon	201–500 ml	Hypermarkets and Supermarkets	Aseptic Carton (Tetra Pak)
Nectars	Grapes	501–1000 ml	HORECA	Glass Bottles
	Mixes and Others	Above 1000 ml	E-commerce	Cans
			Specialty Stores	Stand-up Pouches

Primary source's viewpoint: \_\_\_\_\_



**Q. 6.** What is the percentage contribution or market size of the following types in the citrus fruit juices market and the price for different types of citrus fruit juices products in terms of USD/liters? What are the key factors expected to drive the fastest-growing segments over the next five years? Kindly validate the market segmentation and notify if any segment is missing.

TYPE	MARKET SIZE (USD MILLION)/ MARKET SHARE, 2021	PRICE (USD/LITERS) 2021	CAGR (2022-2027)
Fruit Drinks			
100% Fruit Juice (NFC)			
Nectars			
<b>Total</b>			

Primary source's viewpoint: \_\_\_\_\_

**Q. 7.** What are the key factors expected to drive the citrus fruit juices market over the next five years?

Primary source's viewpoint: \_\_\_\_\_

**Q. 8.** In the citrus fruit juices market, by fruit type, which segment, from those given below, accounted for the largest share in the market in 2021 in terms of value/volume? Kindly validate the market segmentation.

FRUIT TYPE	MARKET SIZE (USD MILLION)/ MARKET SHARE, 2021	MARKET SIZE (MILLION LITERS)/ MARKET SHARE, 2021	CAGR (2022-2027)
Orange			
Lime/lemon			
Grapes			
Mixes and Others			
<b>Total</b>			

Primary source's viewpoint: \_\_\_\_\_

**Q. 9. In the citrus fruit juices market, by pack size, which segment accounted for the largest share in the market in 2021 in terms of value/volume? What would be the growth opportunity in the coming years?**

PACK SIZE	MARKET SIZE (USD MILLION)/ MARKET SHARE, 2021	MARKET SIZE (MILLION LITERS)/ MARKET SHARE, 2021	CAGR (2022-2027)
0-200 ml			
201-500 ml			
501-1000 ml			
Above 1000 ml			
<b>Total</b>			

Primary source's viewpoint: \_\_\_\_\_

**Q. 10. In the citrus fruit juices market, by distribution channel, which segment accounted for the largest share in the market in 2021 in terms of value/volume? What would be the growth opportunity in the coming years?**

DISTRIBUTION CHANNEL	MARKET SIZE (USD MILLION)/ MARKET SHARE, 2021	MARKET SIZE (MILLION LITERS)/ MARKET SHARE, 2021	CAGR (2022-2027)
Convenience Stores			
Hypermarkets and Supermarkets			
HORECA			
E-commerce			
Specialty Stores			
<b>Total</b>			

Primary source's viewpoint: \_\_\_\_\_

**Q. 11. In the citrus fruit juices market, by pack type, which segment accounted for the largest share in the market in 2021 in terms of value/volume? What would be the growth opportunity in the coming years?**

PACK TYPE	MARKET SIZE (USD MILLION)/ MARKET SHARE, 2021	MARKET SIZE (MILLION LITERS)/ MARKET SHARE, 2021	CAGR (2022-2027)
Bottles			
Aseptic Carton (Tetra Pak)			
Glass Bottles			
Cans			
Stand-up Pouches			
<b>Total</b>			

Primary source's viewpoint: \_\_\_\_\_

**Q. 12. What are the different trends regarding the technologies in the citrus fruit juices market? What is the key factor driving the growth of these technologies?**

Primary's response: \_\_\_\_\_

**Q. 13. Please provide your insights on the key players in this market. According to you, which company is expected to dominate the Indian citrus fruit juices market in the next five years, and why? Some of the market leaders are mentioned below:**

COMPANY	MARKET SHARE, 2021
PepsiCo (US)	
Dabur India Limited (India)	
ITC Limited (India)	
Hector Beverages Private Limited (India)	
Patanjali Ayurved (India)	
The Coca-Cola Company (US)	
Smoodies (India)	
Del Monte Foods, Inc (US)	
Rus Organic (India)	
Rakyan Beverages (India)	
Storia Foods (India)	
Spoorthy Organic Farmers (India)	
Axiom Ayurveda Pvt. Ltd. (India)	
Dole plc (US)	
HealthySip (India)	

Primary source's viewpoint: \_\_\_\_\_

**Q. 14. Are there additional key industry participants you know besides the players mentioned above?**

Primary's response: \_\_\_\_\_

**Q. 15. What are the main competitive strategies the players adopt to survive in the market?**

Primary's response: \_\_\_\_\_

**Q. 16. What are the major threats to the citrus fruit juices market? Please provide your comments on the key challenges or revenue shifts your company is experiencing from the demand side of the industry.**

Primary's response: \_\_\_\_\_

**Q. 17. Kindly provide your insights on the drivers, restraints, opportunities, and challenges of the citrus fruit juices market.**

MARKET DYNAMICS	PRIMARY VIEWPOINT
Drivers:	
<ul style="list-style-type: none"> <li>▪ Increasing health awareness about benefits of citrus fruit juices</li> <li>▪ Modern retail stores promoting citrus fruit juice products</li> <li>▪ Steady decline in rural-urban consumption gap</li> </ul>	
Restraints	
<ul style="list-style-type: none"> <li>▪ Bitterness of citrus fruit juices impacting consumer acceptability</li> <li>▪ Citrus allergy and other side-effects</li> <li>▪ Preference for homemade fresh juices over packaged fruit juices</li> </ul>	
Opportunities	
<ul style="list-style-type: none"> <li>▪ Consumers shifting from soft drinks to citrus fruit juices</li> <li>▪ Wider availability of products and their longer shelf life</li> <li>▪ Recyclable and environmentally friendly packaging options</li> </ul>	
Challenges	
<ul style="list-style-type: none"> <li>▪ Presence of unorganized players making market highly competitive</li> <li>▪ Stringent regulatory labelling rules on packaged fruit juices</li> <li>▪ Diseases and seasonal changes affecting cultivation</li> </ul>	

Primary’s viewpoint: \_\_\_\_\_

**Q. 18. What are some of the regulations introduced pertaining to the citrus fruit juices market? Please provide your insights.**

Primary’s viewpoint: \_\_\_\_\_

**Q. 19. What are the upcoming products expected to significantly impact the market in the future?**

Primary’s response: \_\_\_\_\_

**Q. 20. What will be the key revenue pockets for the market in the next five years?**

Primary’s response: \_\_\_\_\_

**Q. 21. What would be your company’s position in this market in the next five years (2022–2027)?**

Primary’s viewpoint: \_\_\_\_\_

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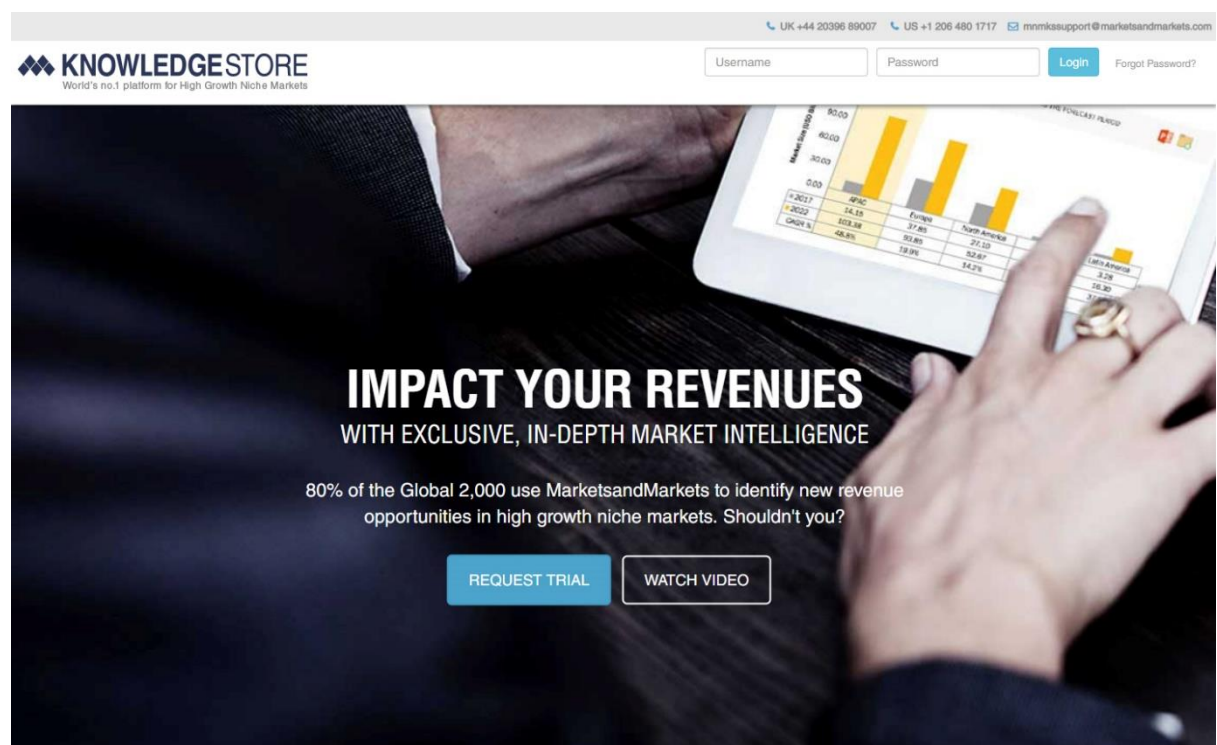
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Food Testing Services and Logistics

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- Automotive & Transportation (270)
- Chemicals & Material (1119)
- Energy & Power (363)
- Food & Beverage (309)**
  - Convenience & Frozen Food (11)
  - Food Ingredients (215)
  - Food Processing & Equipment (52)
  - Food Testing Services and Logistics (31)
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## 14.3 RELATED REPORTS

SR.NO.	REPORT NAME	PUBLISHED YEAR
1	<p><b>FRUIT &amp; VEGETABLE INGREDIENTS MARKET- GLOBAL FORECAST TO 2027</b></p> <p>By Category (Fruits and Vegetables), Nature (Organic, Conventional), Type (Concentrates, Pastes &amp; Purees, NFC Juices, and Pieces &amp; Powders), Application, and Region</p> <p><a href="#">Fruit &amp; Vegetable Ingredients Market Global Trends, Market Share, and Forecast to 2027   MarketsandMarkets</a></p>	May, 2022
2	<p><b>FATS AND OILS MARKET- GLOBAL FORECAST TO 2026</b></p> <p>By Type (Vegetable Oils (Palm, Soybean, Rapeseed, Sunflower, and Olive), Fats (Butter, Tallow, and Lard)), Application (Food and Industrial), Source (Vegetables and Animals), Form, and Region</p> <p><a href="#">Fats and Oils Market Share, Size   2021 - 2026   MarketsandMarkets</a></p>	Aug, 2021

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Syed holds more than 13+ years of rich experience in the Food and Agriculture domain. He is actively involved in conducting strategic advisory research and spearheading turn-key projects for reputed international organizations in the agribusiness sector.

He has also been instrumental in providing solutions to clients pertaining to market sizing, supply chain analysis, competitive intelligence, market entry strategies, etc. Syed has worked on several key consulting projects sponsored by the USDA, European Export Councils, and Tier 1 Food and Agricultural Companies.

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