



The Future of Fruit Juice: Supply Constraints, New Ingredients and Category Reinvention

April 2026

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION: THE GLOBAL JUICE CATEGORY IN 2026

Introduction: Growth slows as prices rise in global fruit juice

How we classify juice as a category

Fruit juice is a global industrial-agricultural system with many points of exposure

A slowing core for the juice category: NFC growth is weak, while coconut water surges

Higher per capita legacy markets are shrinking; emerging economies drive growth

On the packaged soft drinks shelf, the category is losing ground to alternatives

The core question: What does the fruit juice industry look like in 20 years time?

Winners, losers and exposure as global juice demand bifurcates

Introduction: The global juice category in 2026

VOLATILE SUPPLY AND UNCERTAIN CATEGORY ECONOMICS

The end of stable abundance, as US citrus production faces near terminal decline

Climate and disease reshape supply, cost and also taste

Disease and extreme weather are structural constraints

Global trade is becoming more conditional

Labour, land and water: The cost-base is creeping higher

Blends, water-light formats and third party flavour systems gain more importance

Managing global agriculture as a strategic risk variable

Scoring threats to the fruit juice industry:

Volatile supply and uncertain category economics

CITRUS CONSTRAINTS AND APPLES' EXPANDING ROLE

Orange juice may no longer be a household staple

What does "orange juice" become?

Relocating production is necessary, but difficult and slow

Apple juice as an ingredient system beyond the fruit juice category

Can the globalised concentrate system be maintained?

Juice as an input in alcohol and soft drinks

Wine and coffee present trade, climate and agriculture parallels to juice

Citrus constraints and apples' expanding role

BEYOND 100%: FROM PURITY TO BENEFIT-LED JUICES

Standards built for the era of abundance: Industry rethinks Brix levels

Is 100% juice still the consumer's gold standard?

Emphasising the benefits delivered from fruit rather than purity standards

Understanding the "fruit matrix"

Building trust with consumers in a post-purity world

Beyond 100%: From purity to benefit-led juices

DESIGNING FOR SCARCITY: FUTURE PORTFOLIOS, TECH AND OCCASIONS

How can the industry adjust to scarcity? One answer is fermentation

Enzymes can be used to improve resiliency, yield, nutrition and function

Building more climate-resilient fruits

Consumer taste evolution is also reshaping formulations and necessity of sweetness

The beverage aisle by 2045: Juice is central, but peripheral to the RTD category

Securing the future for juice: What the industry can do about it...

CONCLUSION

Recommendations/opportunities for growth

Evolution of the future of juice

Questions we are asking

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/the-future-of-fruit-juice-supply-constraints-new-ingredients-and-category-reinvention/report.