

PACKAGED BEVERAGES

COMPETITION SCAN

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Industry overview

FMCG - PACKAGED BEVERAGES

The FMCG (Fast-Moving Consumer Goods) sector includes essentials and products with low price and high turnover such as food, beverages and personal care products. In this sector, juices & beverages have gained much growth owing to urbanization and health consciousness. The Indian packaged juice market has been valued at ₹12,000+ crore and the trend is shifting to health-focused choices, upmarket offerings, and sustainability in its evolution.

Brands chosen for competition scan :

- **RAW Pressery**
- **Real Juice**
- **Paper Boat**



BRAND OVERVIEW

Brand name	Founded	Target Audience	Market Position
RAW Pressery	2013	Health-conscious Genz and millennials (18-45), fitness enthusiasts, urban professionals	Premium/Niche
Real Fruit Juice	1997	Mass-market consumers, families, kids (for kids' range), young adults	Mass
Paper Boat	2013	Millennials, nostalgia-driven consumers, urban families, kids	Premium/Mass

Communication Strategy Analysis

RAW PRESSERY

Core Messaging:

RAW Pressery emphasizes authenticity and health. Their tagline is "All Good No Bad." Their communications focus on purity, preservative-free, cold-pressed, and use of natural ingredients. The brand urges consumers to live their authentic lives, which they believe in living through their product philosophy.



Ad Campaigns (2021-2024):

BeYouBeRAW (Diwali 2022)

This emotional campaign encouraged people to be themselves and spread goodness.

The campaign resonated well with the audience, reinforcing the brand's authenticity in the festive season.

Spider-Man Collaboration (2021)

Limited edition Spider-Man themed bottles for the No Way Home launch.

Targeted at pop culture enthusiasts + health-conscious customers.

Increased brand awareness through the interesting packaging.

#SummerIsHere (2022)

Hydration & Refreshment for the summer.

Chilled juices & bright, playful visuals.

Raw Pressery's natural & healthy brand image reinforced.



Communication Channels/Strategies Used:

RAW PRESSERY

The brand utilizes a combination of digital and traditional channels, which include:

Social Media – The brand has an engaging presence on Instagram, Facebook, and YouTube. They are largely engaged in brand collaborations with other FMCG products/brands, such as Saucery India which is under the same parent company as Raw Pressery. Other than that they occasionally collaborated with different brands like 'HealtifyMe', 'The Indian Garage Co.' libas india' 'Hello Tempayy' to name a few.

Collaborations – Partnership with franchises and events, so the brand becomes visible, for example Apple BKC launch, Beverage Partner for Poker Sports League etc.

Out-of-Home (OOH) – Billboard and other outdoor advertisements in cities to get the attention of the target population.

They aren't very frequent or active with it though. Majorly the current communication/marketing happens via Social Media



Communication Strategy Analysis

REAL

Core Messaging: Tagline – Healthy is Happy

Emphasizes real fruit goodness & superior quality. A strong and time-honored brand positioning on 'Real Fruit Goodness'.

- Taglines over the years: “Har Sip Mein Health”, “My Real Fruit Power”, and the latest, “Real Mein Hai Sadharan Fruit Drink Se Up to 8 Times More Fruit Juice”.
- Approachable, mass-market, and health-oriented.
- Mix of strong and colorful imagery highlighting fruit quality and freshness.
- Appeals to families, children, and young adults through an emotional but logical tone.



Ad Campaigns :

Real Frizzin Launch ft. Sidharth Malhotra (2024)

Launched Real Frizzin, a fruit-based fizzy drink.

TVC starred Sidharth Malhotra, projecting it as a fun, refreshing alternative to aerated beverages.

Diwali Campaign (2023)

Focussed on family bonding and celebration time.

Emphasized the presence of the brand in celebrations and wholesome goodness. Similar campaigns have been crafted for other festivals like Raksha Bandhan.

Real Activ for Health-Conscious Consumers (Post-Criticism) (old launch, but important for its current strategies)

Following the criticism faced regarding sugar content, Dabur introduced Real Activ, positioned as a healthier, no-added-sugar alternative.

Targeted fitness enthusiasts and young adults.



Communication Channels/Strategies Used:

REAL

Currently Marketing actively on Instagram with **paid UGC campaigns**, mostly by lifestyle content creators and influencers.

Their Instagram feed showcases frequent collaborations with TV actors, lifestyle or health related content creators with followers ranging anywhere from 50k to even 1 million.

Makes use of Polls, challenges and interactive content for increased engagement.

Celebrity Endorsements: Recently signed Sara Ali Khan as brand ambassador to target the Gen Z & young adults.



Communication Strategy Analysis

PAPER BOAT

Core Messaging:

Paper Boat is essentially a brand based on nostalgia, childhood memories, and authentic Indian flavors. Their tagline is "Drinks and Memories." This focuses more on emotions and cultural heritage than on the actual sale of drinks or contents of the beverage. This sets the brand apart as they majorly focus on Classic Indian drinks, providing authentic Indian drinks in modern, easy forms such as Aam Panna, Jaljeera, and Kokum etc.



Ad Campaigns :

Raksha Bandhan Ad (2023)

Heartwarming digital campaign about sibling love using Paper Boat as a shared memory of childhood. Used animation and storytelling to enforce nostalgic brand positioning. Launched on Instagram, YouTube, and OTT.

Paper Boat Swing (Product Launch, 2021)

Paper Boat Swing is a fruit-based dairy drink targeting kids & mothers. Recent ads have been put out on Mother's day called 'Ubasi' and 'Best between friends';

#FloatABoat Social Initiative (2015)

People were requested to fold paper boats and float them, but this was attached to a good cause. The user-generated content fetched high social media engagement. (The reason to note this campaign is that this suggests that Paper Boat emphasizes community building, and connecting to the audiences in an emotional way, that they continue to do with their social media content though they haven't recently published any large scale campaign as such.)



Communication Channels/Strategies Used:

PAPER BOAT

Instagram– The primary platform of Paper Boat is Instagram, where they interact with people on comic-themed threads and posts. These posts address cheerful childlike stories and good vibes, giving more importance to entertainment and emotional connections rather than direct sales.

This has thus established a consistent and easily identifiable look, using soft colors, mostly warm palettes, hand-drawings, and storytelling that focuses on the nostalgic value

Youtube – However Paper Boat does not use YouTube for interactive content like Instagram; rather, they use it to upload video commercials that promote products and campaigns instead of interactive content.

Paper Boat is very good at marketing through stories, creating strong emotional connections with consumers by incorporating nostalgia into the brand message. This method allows for brand loyalty and distinguishes it from competitors with more functional messages.

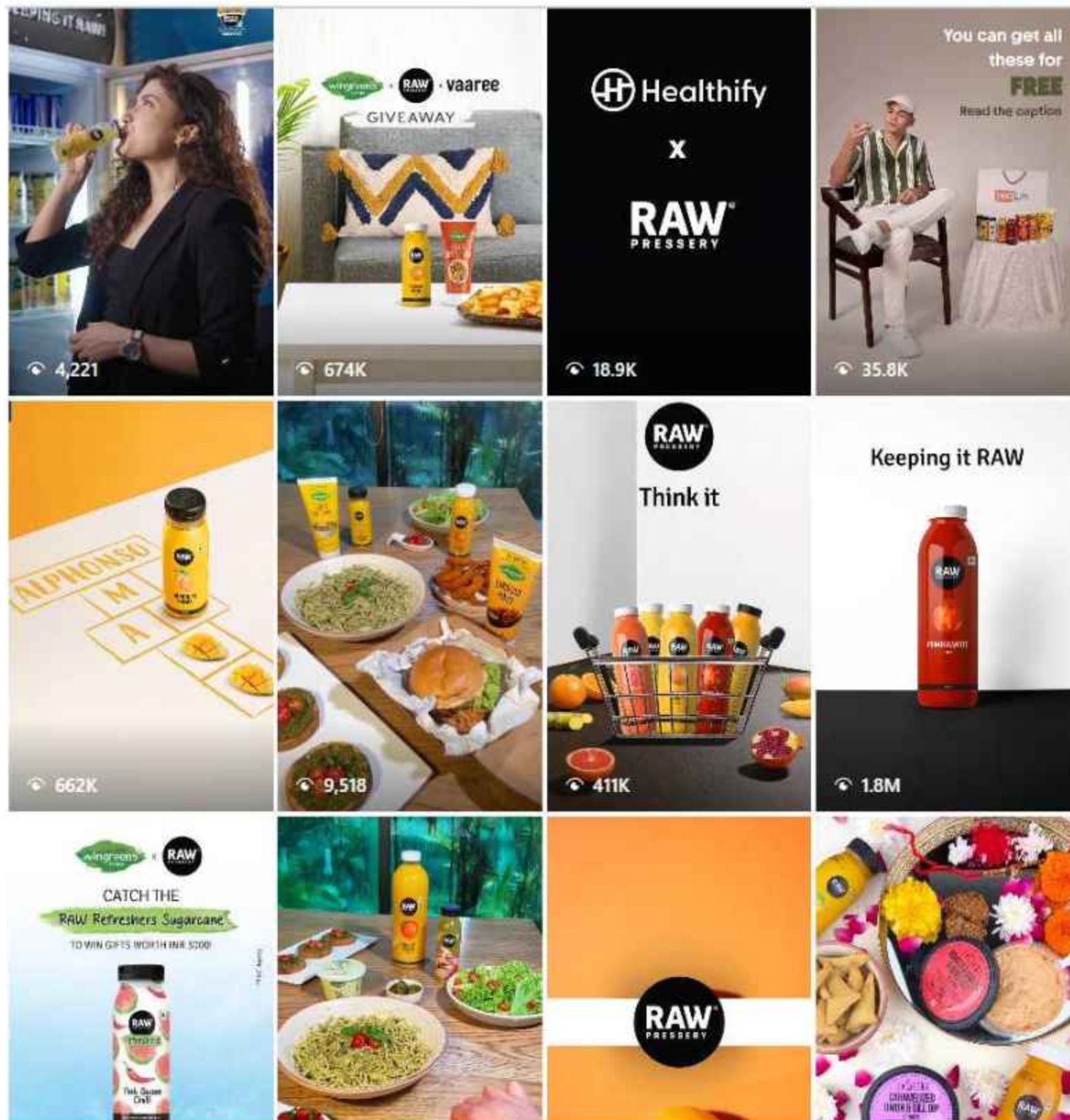


COMPETITIVE COMPARISON & TRENDS

Aspect	RAW Pressery	Real Fruit Juice (Dabur)	Paper Boat
Messaging Approach	Health-focused, premium, lifestyle-driven.	Functional & mass appeal with health positioning.	Nostalgia-driven, emotional storytelling.
Platforms Used	Instagram (UGC, influencer-led), YouTube ads, niche digital.	TV, print, social media, OOH (hoardings, kiosks).	Instagram (illustrated content), YouTube (ads only), TVCs.
Most Successful Campaign (Latest)	Product launch reel - RAW Power Red Energy! #BeYouBeRAW (Diwali 2022)	Real Frizzin ft. Sidharth Malhotra (2024)	Swing's Best Between Friends (2023)
Recent Innovations	Launched RAW Power energy drinks (2023).	Bollywood celebrity endorsements - Made Sara Ali Khan the brand ambassador	Introduced Swing as a sub-brand for Kids and younger population
Instagram Followers (social media presence)	Current Instagram followers - 155k Youtube - 2.63K subscribers	Current instagram followers - 99.3k Youtube - 32k	Current Instagram followers - 200k Youtube - 136k

INSTAGRAM ANALYSIS

RAW Pressery



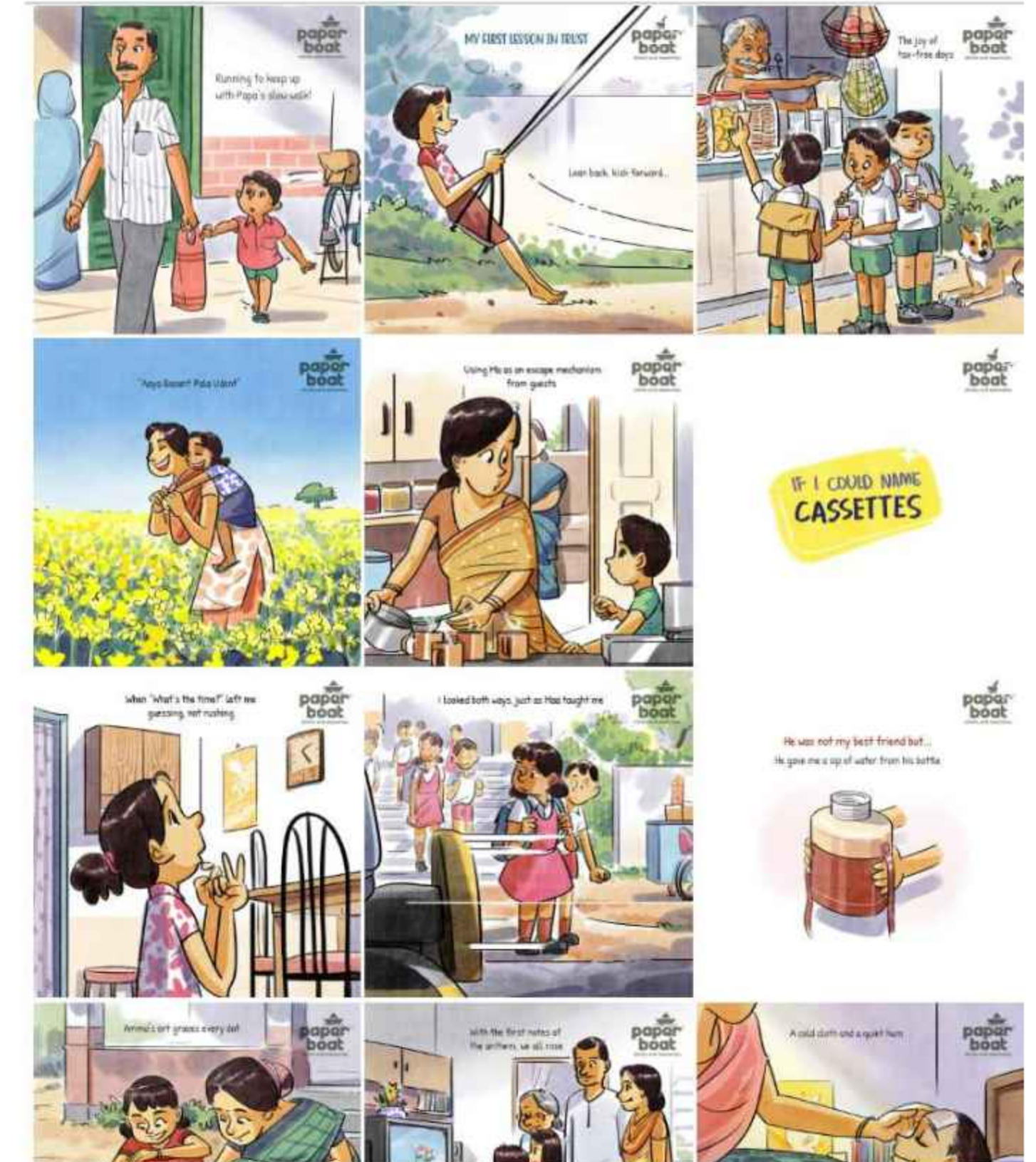
Collaborations with niche brands like themselves, mostly fitness oriented. Fluctuating views, but overall good engagement on instagram

Real Fruit Juice



Heavily dominated by User Generated Content, remaining content includes seasonal and festive posts/reels, consistent views and reach

Paper Boat



Consistent visual language, content based feed rather than sales oriented, best in terms of reach compared to other two competitors

STRENGTHS AND WEAKNESSES

Brand	Strengths	Shortcomings
RAW Pressery	Has a strong brand positioning. Premium and niche audience, thus loyal customer base.	Lacks mass appeal & consistent campaigns. Has Irregular reach as the views keep fluctuating. Can result in less brand recall.
Real Fruit Juice (Dabur)	Strong mass-market presence and high brand recognition	Has generic marketing approach. Thus despite being the most successful brand market-wise out of the 3, it has the least following on social media, and thus can gradually become irrelevant. Uses big names and celebrity endorsement, but lacks digital-first engagement strategies.
Paper Boat	Unique storytelling and has achieved excellent brand recall. Emphasizes on experience over basic consumption	Misses out on trendy social media formats due to its theme limitations. Since the storytelling is highly nostalgia-driven, the younger audience may not relate to old-school stories/experiences. Their tagline 'Drinks and Memories' can be explored more without necessarily having to bring in nostalgia.

SUGGESTIONS

Brand	Reflections & Recommendations
RAW Pressery	They should have more 360 degree campaigns that go beyond just social media. Also since Social media is their strongest platform audience wise , Making use of their existing hashtag #BeYouBeRAW, they can gauge into the idea of being 'unfiltered' as well to build a narrative. This narrative can be used to craft various campaigns. It will also be synonymous to the 'realness' they assert
Real Fruit Juice (Dabur)	To increase their social media engagement, apart from just UGC, they can explore ongoing trends and audios. They should create content more relevant to GenZ who are active users of the platform, with maybe interactive posts like, "What your choice of juice tells about you". 'Real' the word itself is pretty relevant in today's lingo, so a lot fo wordplay can be done than just 'Keep it real' that they currently use.
Paper Boat	As mentioned before, they can focus on their tagline 'Drinks and Memories' to sometimes go beyond nostalgia and just emphasize on the EXPERIENCE such that its relevant to the target audiences of more age-groups than simply millennial. Maybe they can also use the memories that current generation associates with and create a campaign about future nostalgia. Something that they would look back at remember in the future, while Paper Boat can remain the constant. It can also talk about cherishing the moments made better with Paper Boat. Also as their brand is all about Indian culture, they can have demographically relevant campaigns as well. Different flavors from different parts of India, using of course their existing illustration style.

THANK YOU

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