



AIJN
European Fruit Juice
Association



2018
Liquid Fruit
Market Report



JUICE SUMMIT 2018
17-18 October 2018
The must attend event for fruit juice executives
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José Jordão, AIJN President

Introduction from the President

This year's edition of the AIJN Market Report reporting on 2017 shows that the European juice industry continues to face strong headwinds which are hampering its growth. Consumption across Europe declined again by roughly 1% on 2016, posting the 9th consecutive volume decrease since 2008.

The good news is we are fighting back. First and foremost, we are now increasingly capable of rebalancing a profoundly unbalanced conversation with government authorities and health care professionals. This is what the Fruit Juice Matters Programme (FJM) is about; and how important new scientific evidence is and how decisive the capability of research is.

We are confident that current research under the supervision of the FJM Science Expert Panel (SEP) is about to change a very biased perception by key stakeholders. Given intensified attempts at lumping 100% pure fruit juices with all matter of sugar-sweetened beverages, we are determined to ensure that such data are disentangled from all matter of catch-all categories. In fact, when specifically asked, a majority of scientists (recently published) admit not to have considered at all the difference between sugar-sweetened juices and the ones that are legally not allowed to contain added sugar and therefore can legitimately claim that they are "fruit juices".

Our scientific efforts, besides disentangling this deliberate "nutrient-centric" confusion, will more strategically focus away from "macro-nutrient profiling". After all, 100% pure fruit juice is not just sugared water. As this report went to press, unexpected good findings, now in the process of being peer reviewed and published in accredited scientific journals, are proving the rightness of this path.

As a truly global business, the EU juice industry is aware of its role in sustainability matters. AIJN, representing the industry in the Juice CSR platform, is committed to taking on responsibility for ensuring that the operations of its supply chain positively impact society and the environment at large. An important part of the CSR commitment is to ensure responsible sourcing of raw materials. This relevant goal

"... we are now increasingly capable of rebalancing a profoundly unbalanced conversation with government authorities and health care professionals."





can only be achieved with the fundamental inclusiveness and collaboration of national and international suppliers.

AIJN also continues to enhance the critical importance of the Code of Business Conduct and of an independent Quality Control System. The former is indispensable in ensuring that all players in the fruit juice value chain operate in accordance with internationally recognised minimum standards on human rights. The latter, together with the AIJN Code of Practice, is irreplaceable in guaranteeing the authenticity of both raw materials and final products. SGF International has been the control body for plant inspections in over 60 countries worldwide and responsible for the certification of over 400 suppliers.

These are very compelling reasons why AIJN is duly rallying all National Associations together. We are firm believers that reinforced capabilities, patience and additional resources will make the industry credible, respected and perceived again as an important contributor to healthy diets. Along with the support of growers, packaging suppliers, bottlers and retailers, together we will pave the way to winning back consumers to the category. Innovation, and especially new value-added enticing propositions, are required to engage with them and likely to be more successful in recovering the volumes we lost.

A final word for two very important upcoming venues deserving your utmost attention. The Scientific Symposium in Brussels on October 15th/16th and the AIJN Juice Summit in Antwerp on October 17th/18th.

The Symposium will be the first major initiative of our industry. In agreement with the members of the SEP, it will address topics such as scientific insights on fruits and 100% fruit juices, Minimally Processed Foods and Guidelines and Glycaemic Index and Guidelines. Structuring the Symposium along these topics allows us to address the current endpoints as specified in the EFSA's "Draft protocol for the assessment of free sugars from all dietary sources", and to frame the debate away from "free sugars", positioning us strategically much more anchored into the fruit and vegetable category. A strategy that has proven its worth in the Nutrient Profiling debate prematurely abandoned in 2008.

The 6th edition of the Juice Summit, organised by AIJN together with IFU and SGF, will be once more where we all gather to reaffirm how great it is to be in the juice business.

See you there.

The Fruit Juice Industry:

Overall Fruit Juice Consumption

EU fruit juice and nectars consumption was 9.2 billion litres in 2017. Whilst this represented a further decline, the 1.1% drop was an improvement on the previous year's rate of contraction of 2.4%. Per capita consumption of fruit juice and nectars in the EU stood at 17.9 litres in 2017, compared to 18.2 in 2016, retaining its ranking as the third highest region in terms of litres per head.

Global consumption of fruit juice and nectars equated to 36.2 billion litres in 2017; only marginally down on 2016 thanks to a robust performance by Asia Pacific. Whilst the EU remained the largest consumption region, followed by North America, Asia Pacific pulled ahead of West Europe last year. China accounted for the majority of Asia Pacific's volume growth, spurred by Chinese consumers' burgeoning demand for premium fruit juices. Africa/Middle East also recorded an increase, with strong contribution from Saudi Arabia, where fruit juice and nectars benefitted from falling outside the scope of the sugar tax levy. All other regions recorded declines, primarily due to consumer migration to categories perceived as healthier and less sugary, such as packaged and flavoured waters.

Climatic influences

Only a handful of EU countries recorded fruit juice and nectars gains in 2017. Aside from issues around consumer perception of the high sugar content in fruit juice and nectars, raw material prices remained challenging for producers. Later than usual frosts hit the region's apple crops hard, while in Florida the citrus growers, already contending with the effects of the greening disease, were dealt a further blow by Hurricane Irma. While some producers tried to absorb the hike in raw material costs, the pressure on margins meant that others were forced to pass some of the increase on to the consumer.

Total fruit juice and nectars in EU							
Year	2013	2014	2015	2016	2017	16-17 Gr%	
Volume, million litres	9,916	9,590	9,527	9,289	9,187	-1.1%	
Total	Private label	4,273	4,058	3,986	3,798	3,688	-2.9%
	Branded	5,643	5,532	5,541	5,491	5,499	0.2%

Fruit juice (100% juice content)

Total fruit juice	6,442	6,175	6,106	5,994	5,952	-0.7%
Private label	2,911	2,714	2,670	2,562	2,503	-2.3%
Branded	3,531	3,460	3,436	3,432	3,449	0.5%
Chilled	1,396	1,380	1,366	1,415	1,465	3.6%
Ambient	5,046	4,795	4,740	4,579	4,486	-2.0%
From concentrate	4,593	4,311	4,211	4,024	3,908	-2.9%
Not from concentrate	1,850	1,864	1,895	1,970	2,043	3.7%

Nectars (25-99% juice content)

Total nectars	3,474	3,415	3,421	3,295	3,236	-1.8%
Private label	1,361	1,344	1,316	1,237	1,185	-4.2%
Branded	2,112	2,071	2,104	2,059	2,051	-0.4%

Premiumisation

Although overall fruit juice consumption fell in 2017, the chilled and not from concentrate segments remained buoyant. Almost all EU markets recorded increases, with chilled juice seeing an overall gain of 3.6%, taking its share to nearly one-quarter of EU fruit juice volume. Not from concentrate juice registered a similar level of growth, and has made rapid strides over the last five years in terms of share to represent over one-third of EU fruit juice consumption in 2017.

Many consumers are seemingly increasingly willing to pay higher prices for premium fruit juices and smoothies which they perceive to be healthier and more natural than ambient offerings. Producers are responding to the premiumisation trend by emphasising the purity, heritage, transparency of production and the functional/health benefits of their fruit juices. Although still niche, cold pressed, organic and Fair Trade, as well as vegan offerings, are all gaining some traction in markets such as Germany, the UK, France and Italy. Organic and Fair Trade options offer opportunities to attract both health-conscious and ethical consumers to the category. Innovation will be key in continuing to drive the chilled and not from concentrate segments going forwards.

Changing lifestyles

With the demise of the traditional breakfast in many households, fruit juice and nectars have seen a key consumption occasion diminish, and producers are having to seek out alternative avenues. The rise in hectic lifestyle patterns is offering opportunities to harness more 'on the go' consumption. Producers are utilising the premiumisation trend to launch more small sized packs which are suitable for consumption 'on the go'. Whilst this does not always translate into volume gains, there is notable value potential.

Largest EU FJN market by volume consumption, 2017

Country	Million litres
Germany	2,342
France	1,406
United Kingdom	1,079
Poland	820
Spain	808
Others	2,731
Total	9,187

Largest EU FJN market by per-capita consumption, 2017

Country	Population (million)	Litres per person
Cyprus	0.9	30.6
Malta	0.4	28.2
Germany	83.1	28.2
Austria	8.8	22.4
Netherlands	17.2	21.5
Sweden	10.1	21.4

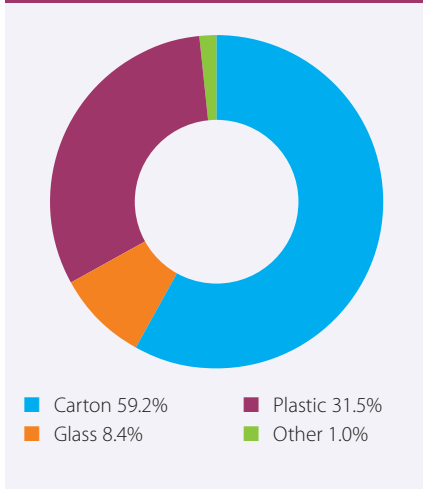
Largest FJN markets by volume consumption by region, 2017

Region	Million litres
North America	8,629
Asia Pacific	8,159
West Europe	8,109
East Europe	4,282
Africa & Middle East	3,633
Latin America	3,436
Total	36,247
EU 28	9,187

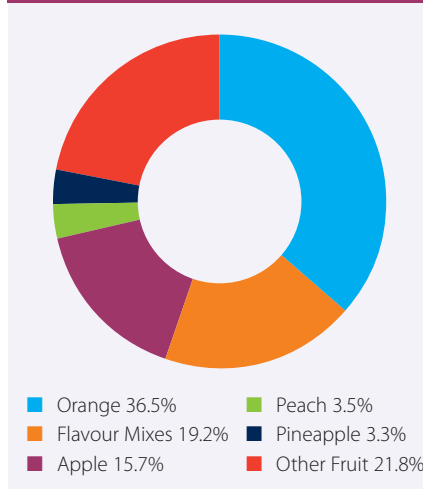
Largest FJN markets by per-capita consumption by region, 2017

Country	Population (million)	Litres per person
North America	363.3	23.7
West Europe	423.5	19.1
EU 28	512.8	17.9
East Europe	399.4	10.7
Latin America	592.0	5.8
Africa & Middle East	979.0	3.7
Asia Pacific	3,755.6	2.2

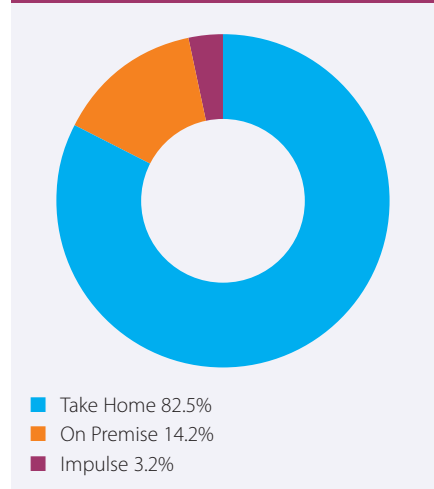
EU fruit juice and nectars by packaging



EU fruit juice and nectars by flavours



EU fruit juice and nectars by channel



European Industry Trends and Segmentation

The lower rate of decline for the EU fruit juice and nectars market in 2017 can be attributed to the impetus provided by the chilled and not from concentrate segments (NFC). Almost all countries recorded gains in chilled and NFC juice, with the region's leading market, Germany seeing a marked deceleration in the rate of contraction, due to the 'natural' trend driving consumer up-trading. By contrast, Belgium, the Netherlands and the UK all posted declines overall and in chilled and NFC juice. In all three countries frequent media reporting of the high sugar content in juice continued to challenge even the premium end of the market. In the UK price increases throughout the year due to raw material price hikes curtailed purchases, but retailers also started to allocate more shelf space to waters.

Segmentation and flavour profile

Nectars suffered a steeper drop than fruit juice, impacted not only by the backlash against sugar, but competition from perceived healthier flavoured water, and in the chilled segment, from chilled juice. Ambient and from concentrate were the biggest losers in both fruit juice and nectars. Some of the heaviest losses in ambient juice volumes were seen in Germany, France and Spain, undermined by the growing consumer propensity for more premium fruit juice. Locally produced juices with certification of origin tick the sustainability boxes and appeal to both the health-conscious and the ethically-minded consumer. Poland, however, continued to buck the ambient trend due to the growing popularity of ambient NFC juices in aseptic PET – both branded and private label.

Orange continued to top the flavour profile, but flavour mixes are expected to increase share going forwards. Much of the innovation in the chilled, NFC and smoothies segments is focused on fruit mixes and, particularly fruit/vegetable mixes, which offer the perception of being lower in sugar. Many new adult-oriented premium products also provide a functional benefit, such as the addition of protein. Apple, despite the poor 2017 harvest due to late frosts continued to rank third, thanks to its role in the main apple growing countries – Germany, France, Poland and Austria. Peach pushed ahead of pineapple in 2017, with the latter losing out to the trend to freshly squeezed orange juice in Spanish retailers.

Brands vs private label profile

Overall, brands outperformed private label again in 2017. Their share has been edging up over the last five years to reach 60% of the fruit juice and nectars market. The premiumisation trend, along with frequent discounting of branded product in key markets has eroded the share of private label. Whilst private label is becoming increasingly differentiated, offering different bands of product ranging from value to premium, brands have been winning driven by stronger marketing of their product credentials, brand story, more functional offerings, and traceability of ingredients. This is particularly the case in the chilled and NFC juice segments.

Channel profile

Fruit juice and nectars still remain heavily skewed to at home consumption, with supermarkets, hypermarkets and discounters the main purveyors. Within the top ten markets, a notable trend in Spain was the introduction by Mercadona of consumer self-squeezed juices which are then packaged and bar coded. Other Spanish retailers have been quick to follow suit. Aside from breakfast use in hotels/accommodation, fruit juice and nectars face strong competition from flavoured waters and still drinks in on-premise. Impulse sales offer significant opportunity for producers to target the growing consumer trend to seeking healthy 'on the go' hydration, and 'breakfast substitutes' such as smoothies.

Country ranking

Five countries account for 70% of the EU's fruit juice and nectars market. Despite falling volumes since 2003, Germany remains the protagonist, with a share of just over one-quarter. France, the UK, Poland and Spain follow respectively. Poland overtook Spain in the ranking in 2017, driven by growing consumer uptake of NFC juice, supported by heavy investment in marketing by both producers and private label.



Organic Food

Meet the Challenges and Developments

Organic food is produced in the EU by about 300,000 producers cultivating nearly 21.1 million hectares in the European Union.

The market for organic food in Europe is **still growing in double-digits** in terms of sales volumes, making the EU the second largest market for organic products after the USA. There is an increasing consumer demand for organic food and a willingness to pay the higher prices. This trend is evident in several market segments, especially as consumers are looking for natural food containing less (or better, no) residues of pesticides, produced in a more sustainable way and making them feel as if they are contributing to a better world. Furthermore, due to food scandals, a perception that organic foods are of a higher quality and more authentic than conventional foods, results in very dynamic market.^{1,2}

However, there are challenges - 90% of the sales of organic food and drinks are found in North America and Europe. In many parts of the world, organic foods are produced exclusively for export markets. Apart from this **specific concentration, consumer behaviour** in buying organic food remains difficult to predict: only a small consumer base (typically living in a major city, having a high disposable income and being discerning when buying foods) is responsible for most organic food purchases. These purchases do not represent everyday shopping – many purchases

cannot be correlated with influences like assessments in consumer magazines or social media campaigns. In this manner forecasting demand is getting difficult.³

Another challenge in the organic business is represented by **standardisation problems** and in **understanding the legal framework** of organic production. The Community Law framework for the organic production, aims and principles of organic production, labelling and dealing with goods from third countries (outside the EU) consists of three regulations:

- Council Regulation (EEC) No. 834/2007 of 28 June 2007 represents the basis for the sustainable development of organic production and sets up aims and principles, details for labelling, competent authorities responsible for controls and basics for trade with third countries.
- Commission Regulation (EC) No. 889/2008 of 5 September 2008 lays down detailed rules for the implementation of Council Regulation (EC) No. 834/2007 with special regard to organic production, labelling and control.
- Commission Regulation (EC) No. 1235/2008 of 8 December 2008 describes detailed rules for the implementation of Council Regulation (EC) No. 834/2007 as regards the arrangements for imports of organic products from third countries.

Apart from these regulations other standards exist, but benchmarking represents a major challenge. In particular, producers outside the main organic trading blocs (EU Organic and USDA NOP) have to consider multiple certifications to access export markets.

Demand concentration, unpredictable consumer behaviour and a lack of harmonisation leads to problems in the supply of organic products: generally speaking, **supply is not keeping pace with demand** as the growth in organic farmland is slower in parts of Europe and North America. In combination with adverse weather conditions, shortfalls of certain crops are feared.³

The **new European organic regulation**, adopted by the European Parliament on 19 April 2018, could represent a promising approach to ease the “regulatory” framework in harmonising organic business. After confirmation from the European Council, and after enacting further implementing and delegated acts, this regulation may come into force on 1 January 2021 and would be directly applicable in all member states.

Approaches to this new legal act can especially be found in the field of **harmonisation** – the new regulation creates better information systems between member states, and responsibilities and organic certification systems will be better harmonised. Another aim of the new European regulation is more consistent **control against fraud and better precautionary measures against contamination** –







authorities or control bodies must act promptly when there is anything suspicious.

A strong signal in proactivity, autonomy and risk-based approaches, is the possibility to extend the inspection intervals from annually based and process-oriented controls to 24 months if no irregularities or infringements have been found in the last three years. This, together with the chance to apply for group certification, eases market access (especially interesting for SME in cooperatives).⁴

The new European approach to be more consistent in fighting against food fraud in the organic sector is not without reason. As per usual – not only in the agribusiness, where a gap between supply and demand exists, or customers would accept (based on the “organic” endorsement) higher prices – adulterations to achieve an economic gain could be attractive. Organic food is within the top 10 products that are most at risk of fraud.⁵

Beneath re-declarations of conventional food labelled as being organically produced, intentional adulteration of food for economic gain may occur (deliberate and intentional substitution, addition, tampering, or misrepresentation of food and/or food ingredients). “Food Fraud” is not a buzzword; being labelled as “organic” does not automatically mean a product is “authentic”! Therefore, not only pesticide screenings are recommended, but also analytical approaches to verify the conformity of a product with the labelled endorsements.

Successful strategies for our industry are necessary to meet these challenges and to avoid scandals and bad news for the fruit juice business. A **holistic view in raw material procurement** is necessary, especially as modern food safety management systems like GFSI recognised schemes (e.g. FSSC 22000, IFS, BRC and SQF) ask for authenticity checks in their most recent versions. Beneath an assessment to identify and prioritise possible vulnerabilities, a documented plan is necessary to specify the control measures being implemented to meet possible food fraud.^{6,7}

Compared to other food businesses, the fruit and vegetable juice industry is much better prepared due to a holistic way of meeting the requirements of modern food quality and a transparent market. Three major pillars assure fruit and vegetable juice authentication:

- **independent industrial self-control** with audits, analytical verification and enforcements of corrective measures along the supply chain,
- **susceptible analytical methods** delivering a basis for reproducible analytical results, and
- **a robust horizon of expectation** showing the usual variability of fruit and vegetable juices manufactured by the usual industrial processing techniques.

Industrial self-control of fruit and vegetable juices is represented by SGF/IRMA (responsible for checking the raw material markets as well as fruit processors, blending stations, traders, brokers, warehouses, cold stores and transport companies) and the European Quality Control Schemes for finished goods and (consumer-) market control (**AEAZN** in Spain, **BSDA** in the United Kingdom, **SGF/IQCS** in Austria, Estonia, Germany, Hungary, Lithuania and the Netherlands and **QualiJus** in France). This sector-specific control is specialised in preventing or mitigating food fraud and operating with susceptible analytical methods, **IFU’s Methods of Analyses**, which are the reference methods for the majority of analytical figures describing the usual variability of fruit and vegetable juices as mentioned in the horizon of expectation, the **AIJN Code of Practice**.^{8,9}

With the help of these pillars, the major aims of organic production are assured:

- a variety of **high-quality** products,
- consumer **confidence**, and
- protecting **consumer interests**.

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Fruit Juice Matters:

How the Industry is Joining Forces to Rebalance the Conversation about 100% Fruit Juice

In recent years, health care professionals and fruit juice drinkers alike have been surrounded by misinformation about the role and quality of 100% fruit juice as part of a healthy lifestyle. Through Fruit Juice Matters, we want to redress the balance. We do not favour or promote specific brands or products; our role is simply to provide truthful, scientific evidence that shows how 100% fruit juice, along with its vitamins and minerals, can contribute to health and well-being.

This non-branded, non-commercial, pan-European programme reaches out to health care professionals, offering them recent scientific research which demonstrates the surprising health benefits of 100% fruit juice.

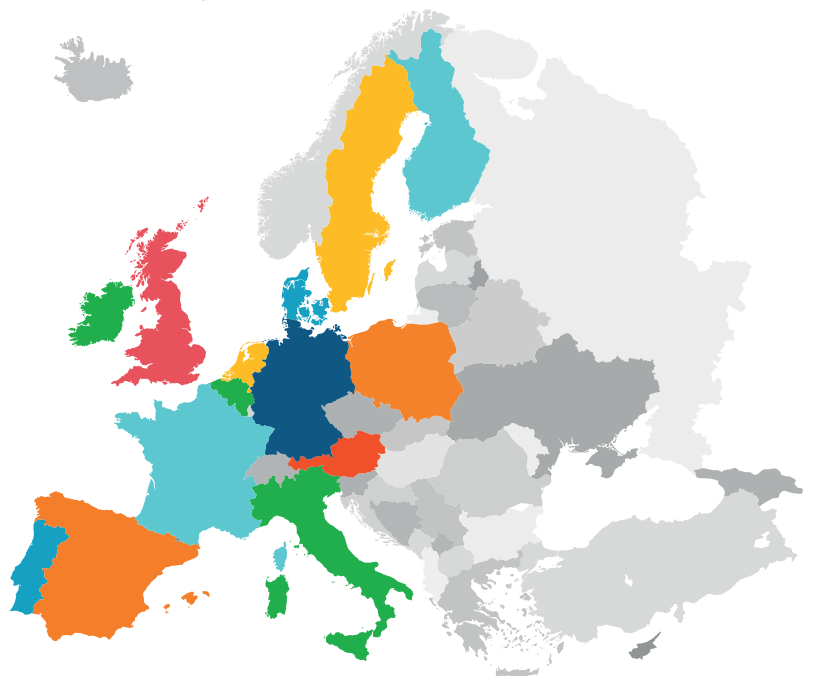
Led by the AIJN (the European Fruit Juice Association), our science-based programme is present in 14 countries:

	Austria		Italy
	Belgium		Netherlands
	Denmark		Poland
	Finland		Portugal
	France		Spain
	Germany		Sweden
	Ireland		UK

Shifting the needle

In late 2017, global market and opinion research specialist, Ipsos, carried out a quantitative representative study across our 14 markets, based on a survey with health care professionals. The survey aimed to gauge perceptions and knowledge levels of fruit juice among those who give nutrition advice: doctors, dietitians, nutritionists and paediatricians. This benchmark wave of research allows us to objectively confirm the size of the challenge we face as we look to restore confidence in 100% fruit juice.

The study revealed some encouraging trends. On a broad level, we observed a much greater acceptance of fruit juice as a complement to fruit and vegetable intake – implying that health care professionals are becoming more convinced of the role of fruit juice as part of a balanced diet. Indeed, 7 out of 10 of those interviewed agreed that packaged 100% orange juice is very or quite good for you. Additionally, two-thirds stated that they often, or quite often, advise patients to consume fruit juice.



While it is clear that the programme is building momentum, the results simultaneously point towards work that still needs to be done; especially regarding misperceptions about the purity of 100% fruit juice. The most significant and harmful example of misinformation revolves around the “sugar” content of juice; which is paradoxical as European law prohibits the addition of sugar to 100% juices. In cases where health care professionals advise against drinking juice, this was the key reason cited.

The story extends to other misunderstandings about the composition of 100% fruit juice, such as preservatives and colourings. A particularly striking finding concerns the interviewees who agreed that 100% orange juice is precisely that – 100% juice; over a quarter of this group believed that it could also contain preservatives. Only 37% of respondents knew that 100% fruit juice is just that: fruit, juiced.

“As the Ipsos survey clearly demonstrated, there are still many misconceptions around the purity of 100% fruit juice, even among health care professionals. This further demonstrates the unequivocal need for objective information. I am confident that results will further inform and fine-tune our strategic direction as we drive to restore confidence in our category.”

Francois Bauwens, Programme Director, Fruit Juice Matters

Building on our scientific foundations

In 2017, Fruit Juice Matters reinforced its commitment to science. We expanded our existing collaboration with our Scientific Expert Panel members, who are conducting and examining new research on fruit juice. Through carrying out their own studies, the 6 panel members aim to contribute to a wealth of approved science on the health benefits of fruit juice. They are also providing evidence that can change perceptions of fruit juice in the academic world.

“There is no evidence that drinking fruit juice increases the risk of diabetes and obesity. In fact, there is no evidence that fruit juice has any negative effect on health.”

**Prof. Rui Hai Liu, University of Cornell
Chair of the FJM Scientific Expert Panel**

“Our research shows that provitamin A is more easily resorbed from orange juice than from fresh oranges. Provitamin A is converted by our bodies to vitamin A, helping to maintain the immune system and our visual functions. The better resorption from juice is, in part, due to the mild heat treatment during pasteurisation.”

Prof. Reinhold Carle, Institute of Food Science & Biotechnology, University of Hohenheim, Stuttgart





Indeed, when specifically asked, a majority of scientists (recently published) admitted that they had not considered at all the difference between sugar-sweetened juices and 100% fruit juices – i.e. those that cannot legally contain added sugar. In the face of these increased attempts to include 100% fruit juices within the same category as all manner of sugar-sweetened beverages, we are determined to separate juice-related data from such catch-all groupings. Our scientific efforts, aside from disentangling this deliberate “nutrient-centric” confusion, will more strategically focus away from “macro-nutrient profiling”. After all, 100% fruit juice is not just sugary water.

At the forefront of research

While not yet authorised health claims, findings from recent research efforts are beginning to unearth some surprising health benefits of 100% orange juice:

- Compared with sugar-sweetened beverages (SSB), 100% FJ has no demonstrable impact on body composition, even when consumed in higher amounts by overweight adults with or without an energy reduced diet.¹
- 100% fruit juice has no unfavourable impact on blood glucose or insulin levels, and no statistically significant association with risk of type 2 diabetes and has some favourable effects on cholesterol and other markers of metabolic syndrome.¹
- Compared with SSB, serum potassium levels were higher after drinking 100% OJ. Potassium is proven to support normal blood pressure.¹
- Studies suggest that 100% fruit juice polyphenols may have a role in supporting normal health and lowering the risk of chronic conditions such as cardiovascular disease, and type 2 diabetes.¹

In early 2018, we released three dossiers reviewing the body of existing evidence on fruit juice; together, these reviews debunked several myths surrounding it. For example, it was found that processed

orange juice is a valuable source of nutrients, with levels of bioactives comparable to, or higher than, those found in whole fruit in some cases². Moreover, fruit juices do not unfavourably impact blood glucose or insulin levels³, nor do they increase the risk of type 2 diabetes⁴ – contrary to popular belief.

In parallel, Fruit Juice Matters partners with local, in-country key opinion leaders. Experts in their field, they are credible influencers who understand the nuances of their local market. We also partnered with new local experts to support the 14 markets from a local perspective.

Still to come

As we move through 2018, we will continue to push forward with a variety of activities. Most importantly, we will continue our focus on delivering high-quality scientific nutrition content in all 14 countries. We will also further strengthen our digital communications to stimulate the interactivity with health care professionals.

In a nutshell

There are encouraging signs that we are managing to gradually start turning the tide in favour of fruit juice among health care professionals. However, it is important to maintain the momentum of the Fruit Juice Matters programme by providing solid scientific evidence to tackle the remaining misconceptions about the purity and nutritional benefits of 100% fruit juice.

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Update on the Juice CSR Platform and Next Steps

The European juice sector:

- Sourcing from complex global supply chains;
- Composed of companies of various sizes and levels of vertical integration;
- Facing different sustainability standards at farm and at processing level that also vary per country.

Yet it is a sector that relies on the supply of safe and competitively priced raw materials, with the quantity and quality needed to produce sufficient and varied juices for European and international consumers. Securing the long-term sustainability of the sector thus inherently means taking care of the long-term economic, environmental and social sustainability of the entire value chain. It also means mainstreaming corporate responsibility across the sector.

And that is indeed one of the primary roles of the Juice CSR Platform - a sustainability initiative of the juice industry established by AJN in 2013 and supported by the European Commission. This Platform aims to gather around the same table representatives of the whole juice supply chain: primary producers, processors, bottlers, retailers, suppliers and NGOs. This multi-stakeholder approach is key to ensure that perspectives and experiences of all key stakeholders in the juice supply chain are taken into account. The Platform further works on ensuring harmonisation and alignment with other sustainability

initiatives, with the objective to save time and effort, avoid work duplication and scale up impacts. It also provides one clear space and reference point to communicate the juice sector's commitment, progress and best practices.

We are a collaborative platform focusing on continuous social, environmental and economic improvement

From fruit growers to retailers



We engage companies in the juice sector to drive sustainable change

Finding solutions for common sustainability challenges

The main Juice CSR Platform activity takes place in specific country/crop working groups. There are currently three of them: Brazil / orange, Poland / apple, Thailand / pineapple. The objective of these groups is to carry out the analysis of these particular supply chains and identify hotspots from an environmental, social and economic perspective, and then seek solutions for improvements through collaborative projects.

Managing risk together



Telling a story together




Driving compliance together



Working group 1 – Orange/Brazil

- Development of an internal information paper about the current situation in Brazil (trade statistics, economic landscape, legislation, working conditions, key environmental challenges, etc.)
- Identification of hotspots around which collaborative pilot projects can be developed or existing projects scaled up
- Field trip to Brazil Q3 2018 to engage in a dialogue and exchange of information with relevant local stakeholders, and to ensure alignment with existing initiatives in Brazil
- Continued communication through dedicated website and LinkedIn promoting good practice and sector commitment to improvement

Issues addressed



Motivation


The Phytosanitary Alert project is one of the tools involved in the joint management of greening. The work of Fundedtrus, farmers and other stakeholders includes several other initiatives in the regional management of diseases such as the acquisition of new devices: to provide agility and precision in the diagnostic process; new researches; training and the improvement of the tool.

Benefits

Posted by Charlotte Meuwis · 1/29/2018 · Sponsor new


Juice CSR Platform
33 members

Fundedtrus announces bioinsecticide against the citrus greening sector - the product uses a fungus that kills the psyllid without causing environmental damage
<https://lnkd.in/g/awp1e>



0 likes · 0 comments

Also: the Secretariat of Agriculture and Supply of the State of São Paulo organizes events to train fruit growers on how to identify greening in the trees and the best practices to fight the disease.





Working group 2 – Apple/Poland

- Development of an internal information paper about the current situation in the Polish apple supply chain from an economic, environmental and social perspective
- Identification of hotspots around which collaborative pilot projects can be developed
- Field trips to Poland in Q2 and Q4 2017 to identify key local stakeholders to collaborate with
- Publication of top 10 advice / best practices to promote better labour conditions for temporary workers (distributed on farms)
- Development of an impact yardstick for the most used pesticides in Polish apple growing with an indication of more environmentally friendly alternatives



Working group 3 – Pineapple/Thailand

- Development of a questionnaire for processors regarding labour issues (in particular as regards migrant workers)
- Field trip to Thailand Q2 2018 to interview local stakeholders and investigate the situation regarding labour issues at farm level
- Analysis of the new legislation on migrant workers and contract farming
- Exploring the need and feasibility of setting up farmer training



Through these working groups and with the great efforts and motivation of Juice CSR Platform members, important progress has already been achieved. Further improvements are possible with more

stakeholders reaching out for this collaborative approach. So join the Juice CSR Platform!

www.juicecsr.eu

Members of the CSR Platform





Conclusions and Outlook

Uncertainties surrounding Brexit and the nature of the operational trading environment colouring forecast predictions

Given the prevailing uncertainties still surrounding the Brexit process, the potential impact on supply chains, on the UK's economy and on the UK's trading relationship with both the EU and other markets, expectations are that the EU fruit juice and nectars market will see a marginal drop in 2018. The rate of contraction is currently forecast to increase in 2019 on the assumption that there is likely to be disruption to the operational trading environment in the first transitional year of Brexit, and a potential decrease in consumer confidence. Thereafter, the year on year drop is predicted to be around the 1-2% mark per annum. By 2023, EU fruit juice and nectars consumption is forecast to stand at around 8.2 billion litres. East European markets, such as Poland, Hungary and the Czech Republic, driven by rising disposable incomes and growing consumer appreciation of the health and wellness benefits of fruit juice, are predicted to be the main markets to record incremental volume growth over the forecast period.

Growing trend to propensity for premium juices

West European markets are forecast to continue to be primarily responsible for the volume contraction in EU fruit juice and nectars due

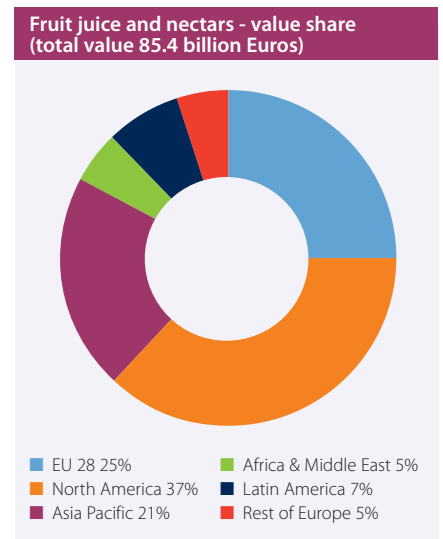
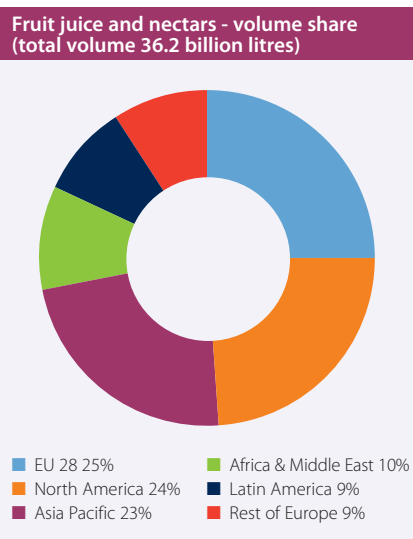
to a combination of likely volatility in commodity costs hitting producer overheads and ultimately the price to the consumer, and concerns around sugar content. With the introduction of the Soft Drinks Levy in the UK in April this year, from which fruit juice is exempt, it remains to be seen if some consumers will choose to switch their soft drinks consumption towards fruit juice. Chilled and not from concentrate fruit juices are expected to remain the growth engine.

Whilst some consumers will remain price-sensitive, there is a growing cohort willing to pay for premium chilled and not from concentrate juices, and in the larger markets experiment with cold pressed, organic, Fair Trade and vegan options as part of a healthy and/or ethical lifestyle; or just as an occasional indulgent treat.

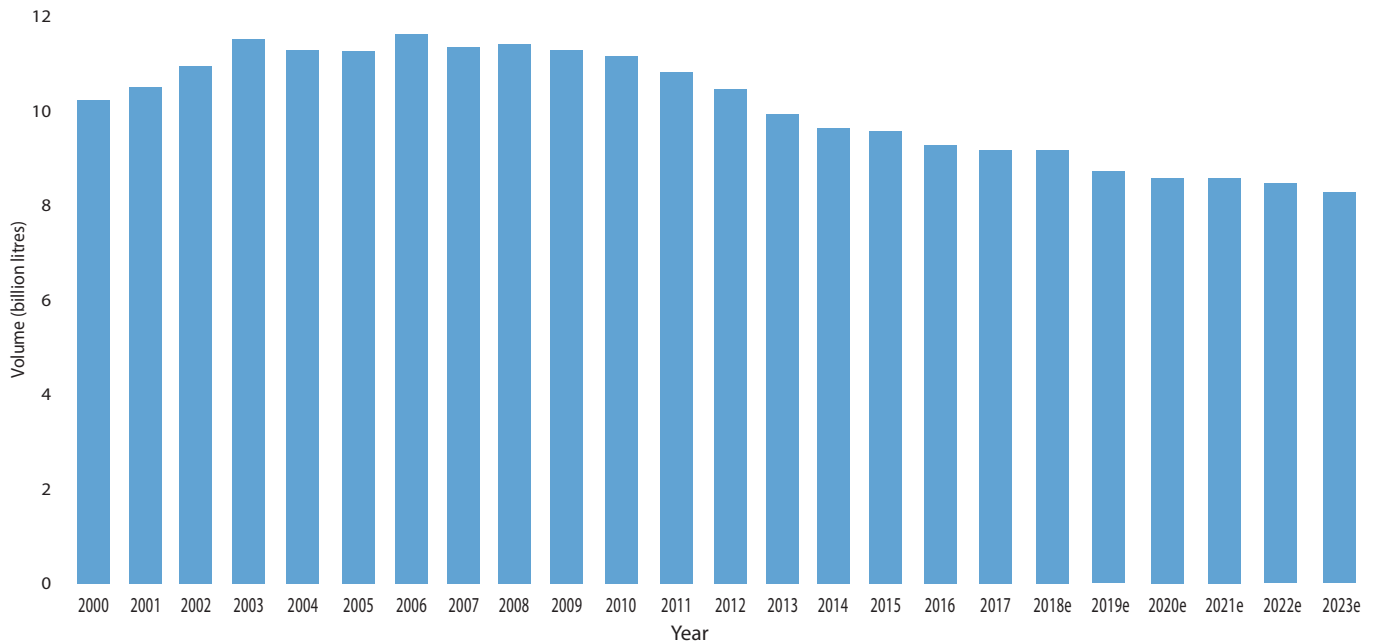
Education and transparency

The challenge for producers will remain educating the wider consumer base with regards to the "natural sugar" content of fruit juice. Sustained marketing of their products' origins and nutritional benefits, transparency of production processes and sustainability

"Chilled and NFC expected to remain the growth engine of the fruit juice and nectars market."



Total EU fruit juice and nectars consumption 2000-2023E



credentials, will all be key in raising the profile of the industry. In the premium segment, innovation in vegetable mixes and functional enhancements will also be important in appealing to the health-conscious consumer, driving up-trading, expanding consumption occasions and justifying higher price points.

The growing focus on packaging innovation and particularly small sized and translucent packaging so that the consumer can view the product prior to purchase, and formats that are easily portable/recloseable, is in tune with rising consumer demand for 'on the go' healthy hydration. This will ultimately help to boost impulse sales, and producer and retailer margins.

Producers will, however, need to be increasingly mindful of the war on plastic and the growing consumer demand for eco-friendly packaging. The EU's call in January this year for all plastic in Europe to be either reusable or recyclable by 2030, means that sustainability and environmental responsibilities will of necessity be top of producers' packaging development strategies.

Many consumers are also becoming increasingly savvy with regards to the ingredients of the fruit juice or nectar they are looking to purchase. In a market place where cross-category beverage concepts are continuing to spring up, fruit juice and nectars producers need to ensure the visibility of clean labelling and that it is simply and clearly communicated on pack in order not to risk losing a sale to an alternative hydration option, for example juice-based carbonates and flavoured waters.

EU vs Global

The EU remained one pace ahead of North America in 2017, accounting for 25% vs 24% respectively of global fruit juice and nectars consumption in volume terms. Asia Pacific has been fast narrowing the gap with North America, and is expected to overtake it in 2018, with strong contribution from China. Despite a dip, North America remained the global leader in value terms due to higher prices per litre and consumer propensity for chilled and NFC juices. Together the EU, North America and Asia Pacific accounted for nearly 82% of global fruit juice and nectars value in 2017.



Austria

Population: **8.8 million**

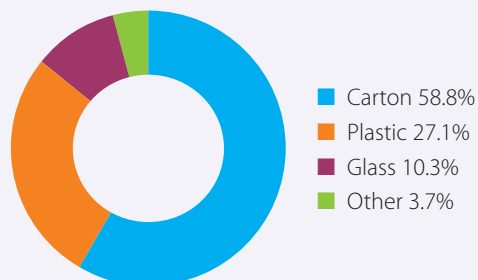
Whilst the overall **fruit juice** market recorded another year of decline, the chilled segment bucked the trend. Producer new product development responding to consumer demand for products offering functional benefits, supported by strong above the line activity continued to increase consumer penetration of chilled juice. Going forwards, sustainability - such as locally produced organic fruits/vegetables and Fair Trade offerings - is expected to become increasingly important to consumers. The improved economic climate is forecast to lead to more up-trading by consumers.

Demand for **nectars** remained depressed in 2017. The nectars category is facing the threat of becoming solely a commodity as a result of inferior quality products undermining the category's image. Nectars offering functionality such as Happy Day (Rauch) containing super fruits with antioxidant properties are expected to remain the focus of new product activity. Overall, however, further decline is forecast for nectars due to consumer up-trading to juice as a result of the predicted increase in private consumption.

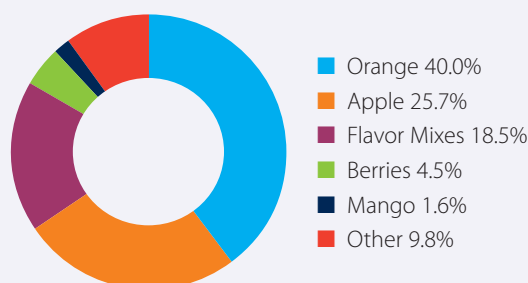
Smoothies are still niche but continue to see robust growth driven by demand for fruit juices offering added benefits, and range extensions and innovations supported with high marketing investments by key brands such as Innocent (Coca-Cola).

"Demand for functionality."

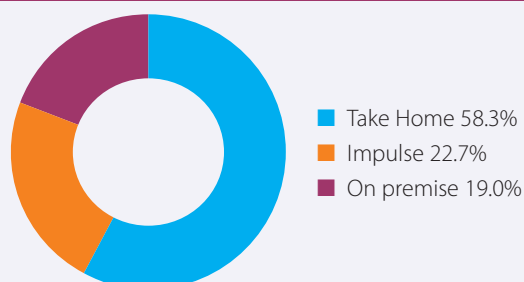
Fruit juice and nectars by packaging



Fruit juice and nectars by flavours



Fruit juice and nectars by channel



Total fruit juice and nectars

Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	214	210	199	181	197	9.1%
Top two brands						2017 Vol ml
Juice	Happy Day					29.0
	Hofer (PL)					24.3
Nectars	Happy Day					14.9
	Hofer (PL)					11.8

Fruit juice (100% juice content)

Total fruit juice	2013	2014	2015	2016	2017	%
Total fruit juice	178	174	165	150	138	-7.8%
Branded	84	75	80	78	78	-0.4%
Private label	60	57	64	61	60	-1.7%
Ambient	128	113	118	111	108	-3.1%
Branded	75	65	64	59	57	-4.1%
Private label	54	49	54	52	51	-2.0%
From concentrate	126	111	115	109	105	-3.2%
Branded	72	62	61	57	54	-4.2%
Private label	54	49	54	52	51	-2.0%
Not from concentrate	3	3	3	3	3	-2.2%
Branded	3	3	3	3	3	-2.2%
Chilled	16	19	25	28	30	7.6%
Branded	9	11	16	19	21	11.1%
Private label	7	8	9	9	9	0.5%
Not from concentrate	16	19	25	28	30	7.6%
Branded	16	19	25	28	21	-25.1%
Private label	9	11	16	19	9	-51.4%
of which are smoothies	3	5	6	7	8	15.2%
Branded	3	3	4	5	5	17.6%
Private label	0	2	2	3	3	10.9%

Nectars (25-99% juice content)

Total nectars	2013	2014	2015	2016	2017	%
Total nectars	68	65	64	61	59	-3.4%
Branded	42	40	39	37	36	-3.7%
Private label	26	25	25	24	23	-3.1%
Ambient	68	65	64	61	59	-3.4%
Branded	42	40	39	37	36	-3.7%
Private label	26	25	25	24	23	-3.1%
From concentrate	68	65	64	61	59	-3.4%
Branded	42	40	39	37	36	-3.7%
Private label	26	25	25	24	23	-3.1%



Belgium

Population: **11.4 million**

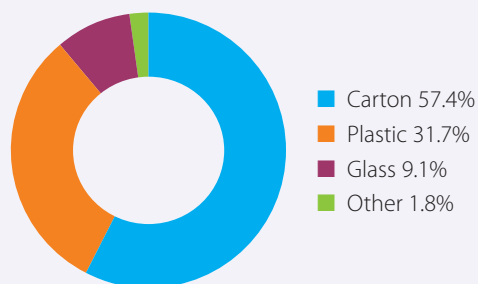
Media highlighting of **fruit juice** as a prime example of hidden sugars continues to undermine the category. The mental image of a glass of juice with a picture of a number of sugar cubes stacked on top of each other is one that many Belgian consumers are familiar with. Fruit juice is increasingly viewed by consumers as a "sweet treat" to be consumed in smaller quantities alongside a meal. Producers are working hard to counteract the negative perceptions, with campaigns highlighting the natural quality of fruit juice and its potential valuable contribution to a healthy lifestyle.

Nectars are equally being shunned due to perception of the high sugar content in products. In the eyes of the consumer there is little or no difference between juice and nectars; especially given the similarity in marketing efforts, as well as the positioning of the two categories alongside each other in supermarkets. Further contraction is expected in 2018 given a lack of marketing support and product development in the category.

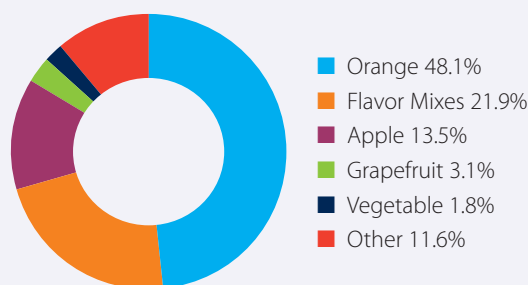
Smoothies play only a very marginal role with volumes still hovering around the one million litres mark in 2017. There are as yet only a limited number of brands and private labels on the market.

"Producers working to boost juice image."

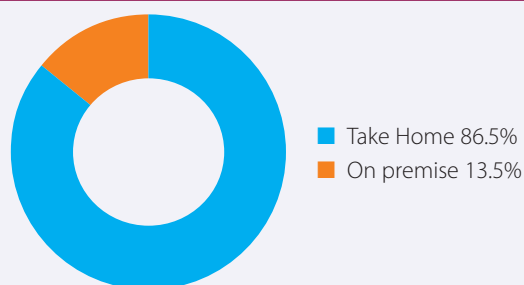
Fruit juice and nectars by packaging



Fruit juice and nectars by flavours



Fruit juice and nectars by channel



Total fruit juice and nectars

Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	214	210	199	181	167	-7.6%
Top two brands						2017 Vol ml
Juice	Minute Maid					13.4
	Appelsientje					6.8
Nectars	Minute Maid					9.0
	Looza					4.0

Fruit juice (100% juice content)

Total fruit juice	178	174	165	150	139	-7.7%
Branded	68	66	63	58	54	-7.0%
Private label	109	108	102	92	85	-8.2%
Ambient	158	154	144	131	120	-8.0%
Branded	54	51	48	44	41	-7.1%
Private label	104	103	96	87	79	-8.5%
From concentrate	158	153	144	131	120	-8.0%
Branded	54	51	48	44	41	-7.1%
Private label	104	103	96	87	79	-8.5%
Not from concentrate	0	0	0	0	0	-1.2%
Branded	0	0	0	0	0	-1.2%
Private label	0	0	0	0	0	0.0%
Chilled	19	21	21	19	18	-5.4%
Branded	14	15	15	13	12	-6.5%
Private label	5	5	6	6	6	-2.9%
From concentrate	0	0	0	0	0	-1.2%
Branded	0	0	0	0	0	-1.2%
Not from concentrate	19	21	20	19	18	-5.5%
Branded	14	15	15	13	12	-6.7%
Private label	5	5	6	6	6	-2.9%
<i>of which are smoothies</i>	0	0	1	1	1	15.0%
Branded	0	0	0	1	1	13.5%
Private label	0	0	0	0	0	18.5%

Nectars (25-99% juice content)

Total nectars	36	36	34	31	28	-7.0%
Branded	23	24	22	21	19	-7.5%
Private label	13	12	12	10	9	-5.9%
Ambient	35	35	33	30	28	-6.8%
Branded	23	23	21	20	18	-7.3%
Private label	13	12	12	10	9	-5.9%
From concentrate	35	35	33	30	28	-6.8%
Branded	23	23	21	20	18	-7.3%
Private label	13	12	12	10	9	-5.9%
Chilled	1	1	1	1	1	-11.5%
Branded	1	1	1	1	1	-11.5%
From concentrate	1	1	1	1	1	-11.5%
Branded	1	1	1	1	1	-11.5%
<i>of which are smoothies</i>	0	0	0	0	0	-33.6%
Branded	0	0	0	0	0	-33.6%

France

Population: **67.0 million**

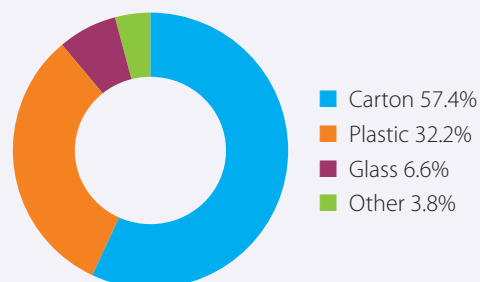
Fruit juice saw a significant improvement on 2016's performance. The slowdown in the negative growth rate was attributable to demand for chilled and not from concentrate juice. Fruit juice is seeing increasing premiumisation, with the health trend encouraging uptake of not from concentrate and chilled juice, as well as organic juices. Organic juice is estimated to have accounted for some 6% of the fruit juice category in 2017. Innovation in fruit/vegetable mixes is also supporting this trend. Cold pressed juice is still a very niche segment but showing strong growth on the back of the trend to drink less, but higher quality. Fruit juice producers, however, are still having to contend with media coverage highlighting the high sugar content of juice.

Nectars also recorded a much more upbeat performance in 2017 thanks to demand for organic and chilled variants, which are perceived to be healthier. The category still suffers from a negative public image, which sees nectars as being too sweet and unhealthy, but brands such as Joker Le Bio (Eckes-Granini) and Pressade (Britvic) are working to change this perception. Reformulation is also playing a role.

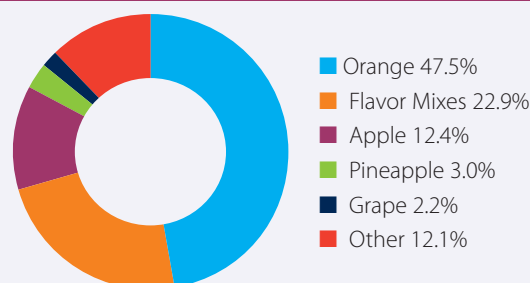
Smoothies are very much in tune with consumer preference for fresh, natural and high quality fruit juice and nectars and saw further vibrant increase in branded product in 2017. Innovation in fruit/vegetable mixes and strong marketing supported the growth.

"Increasing premiumisation."

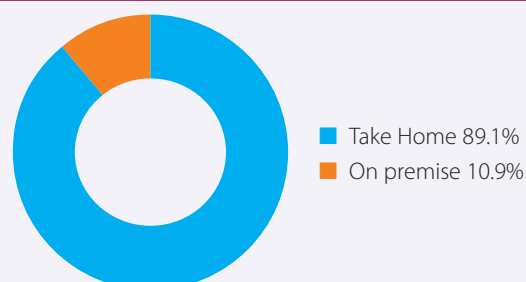
Fruit juice and nectars by packaging



Fruit juice and nectars by flavours



Fruit juice and nectars by channel



Total fruit juice and nectars

Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	1,599	1,526	1,482	1,415	1,406	-0.6%
Top two brands						2017 Vol ml
Juice	Tropicana					187.5
	Joker (Eckes-Granini)					111.2
Nectars	Pressade					26.3
	Joker (Eckes-Granini)					10.1

Fruit juice (100% juice content)

Total fruit juice	2013	2014	2015	2016	2017	Gr%
Total fruit juice	1,281	1,237	1,221	1,174	1,164	-0.8%
Branded	586	579	589	591	616	4.2%
	Private label	695	658	633	583	548
Ambient	1,111	1,062	1,037	978	945	-3.3%
Branded	468	456	457	445	446	0.4%
	Private label	643	606	580	533	499
From concentrate	509	472	451	411	384	-6.5%
Branded	151	145	144	135	129	-4.1%
	Private label	357	327	307	276	255
Not from concentrate	602	590	586	567	561	-1.1%
Branded	317	312	313	310	317	2.3%
	Private label	286	278	273	257	244
<i>of which are smoothies</i>	0	0	0	0	0	0.0%
Branded	0	0	0	0	0	0.0%
	Private label	0	0	0	0	0
Chilled	170	175	184	196	219	11.8%
Branded	118	122	132	146	170	15.9%
	Private label	52	53	52	50	49
Not from concentrate	170	175	184	196	219	11.8%
Branded	118	122	132	146	170	15.9%
	Private label	52	53	52	50	49
<i>of which are smoothies</i>	15	14	13	17	27	55.6%
Branded	8	5	8	12	21	83.3%
	Private label	7	9	5	6	5

Nectars (25-99% juice content)

Total nectars	2013	2014	2015	2016	2017	Gr%
Total nectars	319	289	261	241	242	0.4%
Branded	76	73	75	83	110	31.7%
	Private label	243	216	185	158	133
Ambient	317	289	261	241	241	0.2%
Branded	75	73	75	83	109	31.2%
	Private label	242	215	185	158	132
From concentrate	317	289	261	241	241	0.2%
Branded	75	73	75	83	109	31.2%
	Private label	242	215	185	158	132
<i>of which are smoothies</i>	4	5	5	5	5	6.3%
Branded	2	1	2	1	2	4.3%
	Private label	3	3	3	3	3
Chilled	1	0	0	1	1	68.3%
Branded	1	0	0	0	1	151.9%
	Private label	0	0	0	0	0
From concentrate	1	0	0	0	0	0.2%
Branded	1	0	0	0	0	0.0%
	Private label	0	0	0	0	0
Not from concentrate	0	0	0	0	1	151.9%
Branded	0	0	0	0	1	151.9%
	Private label	0	0	0	0	0

Germany

Population: **83.1 million**

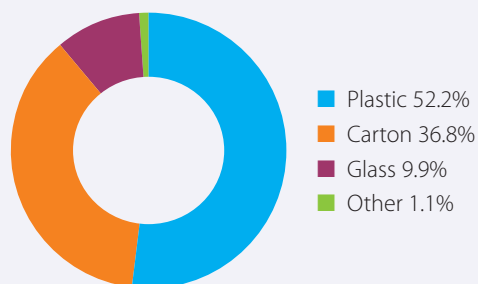
Europe's leading **fruit juice** market has been in decline since 2003, but in 2017 saw a marked deceleration in the rate of contraction. Fruit juice is benefitting from the "natural" trend, with chilled, not from concentrate, organic variants and smoothies all contributing to lessen the category's fall. Consumers are becoming increasingly informed and able to distinguish between high and low quality products. Price promotions are frequent for both brands and private label. Some consumers stick to one or two premium brands which they purchase only when they deem the prices to be affordable.

Nectars are suffering from changing lifestyles, reduced consumption occasions and a reputation as a low quality product. The premiumisation trend is working against the category's development. Nectars lack a competitive edge versus juice, and focused marketing is also low with producers tending to run combined campaigns for their juice and nectars brands.

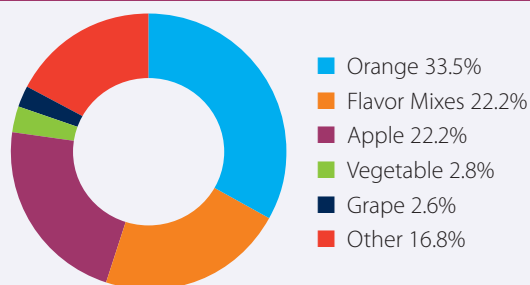
Smoothies was the star performer in growth terms in 2017 as consumers sought out "natural" beverages with perceived health benefits. The launch of more innovative flavour mixes and strong marketing helped fuel the growth. More small pack sizes were also in evidence responding to "on the go" consumption trends.

"Natural trend driving consumer up-trading."

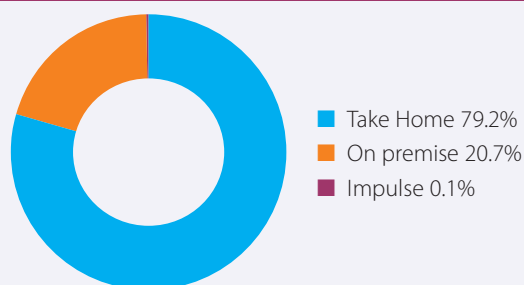
Fruit juice and nectars by packaging



Fruit juice and nectars by flavours



Fruit juice and nectars by channel



Total fruit juice and nectars

Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	2,488	2,408	2,397	2,361	2,342	-0.8%
Top two brands						2017 Vol ml
Juice	Valensina					117.0
	Hohes C					111.1
Nectars	Granini					87.0
	Punica					75.9

Fruit juice (100% juice content)

Total fruit juice	1,747	1,669	1,640	1,617	1,611	-0.4%
Branded	915	900	903	904	915	1.2%
Private label	832	768	737	712	695	-2.4%
Ambient	1,670	1,570	1,530	1,489	1,462	-1.8%
Branded	839	807	801	790	785	-0.6%
Private label	831	763	730	699	677	-3.1%
From concentrate	1,439	1,336	1,283	1,229	1,197	-2.6%
Branded	781	751	743	729	722	-1.0%
Private label	657	585	540	500	475	-5.0%
Not from concentrate	232	234	247	259	265	2.1%
Branded	58	56	58	61	63	3.5%
Private label	174	179	189	199	202	1.7%
of which are smoothies	0	0	0	0	0	7.5%
Branded	0	0	0	0	0	7.5%
Chilled	77	98	109	128	149	16.3%
Branded	76	94	102	115	130	13.9%
Private label	1	5	7	13	18	37.1%
From concentrate	41	50	54	58	59	3.3%
Branded	41	50	54	58	59	3.3%
Not from concentrate	36	49	56	70	89	27.0%
Branded	35	44	49	57	71	24.6%
Private label	1	5	7	13	18	37.1%
of which are smoothies	8	17	25	39	53	35.6%
Branded	7	12	18	26	35	34.9%
Private label	1	5	7	13	18	37.1%

Nectars (25-99% juice content)

Total nectars	741	739	757	744	731	-1.7%
Branded	429	406	412	401	389	-2.9%
Private label	312	333	345	343	342	-0.4%
Ambient	736	738	756	744	730	-1.8%
Branded	424	405	412	400	388	-3.0%
Private label	312	333	345	343	342	-0.4%
From concentrate	736	738	755	743	729	-1.8%
Branded	424	405	411	399	387	-3.0%
Private label	312	333	345	343	342	-0.4%
Not from concentrate	1	1	1	1	1	0.0%
Branded	1	1	1	1	1	0.0%
Chilled	4	1	1	1	1	38.0%
Branded	4	1	1	1	1	38.0%
From concentrate	4	1	1	1	1	38.0%
Branded	4	1	1	1	1	38.0%
of which are smoothies	4	1	1	1	1	35.3%
Branded	4	1	1	1	1	35.3%

Population: **60.5 million**

Fruit juice saw a marked improvement in demand in 2017 boosted by favourable weather and a notable turnaround in the fortunes of the ambient segment, thanks to a revival of sales via off-premise. This was supported by growing consumer uptake of higher quality products produced from select raw materials. The chilled segment continued to outperform the market. The continuing trend towards natural, genuine and 'good for you' products is favouring premium fruit juice; particularly not from concentrate chilled juice and fruit juices produced from domestic fruits. Organic and vegan fruit juice offerings are gaining traction.

Nectars also benefitted from the good weather. Consumers are showing an increasing preference for products with a higher juice content produced from high quality raw materials with certification of origin. Low added sugar products are also gaining ground thanks to the health and wellness trend. Children remain the leading consumer group for nectars in Italy, and producers continue to focus on developing products targetted specifically at young consumers.

Nectars, however, suffer from limited investment to promote alternative consumption occasions such as breakfast. Highlighting the value of the category to the consumer through continuous improvement in product quality, and communication of product benefits, remain an important challenge for producers. As in fruit juice, the organic segment is gaining momentum.

Smoothies remain a niche and waning segment with few players left on the market. Smoothies are being undermined by consumer preference for premium fruit juice and nectars with proven quality and/or domestic provenance.

“Organic and vegan offerings gaining traction.”

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	726	690	699	659	665	0.9%
Top two brands						2017 Vol ml
Juice	Santal					15.2
	Skipper					12.0
Nectars	Yoga					72.3
	Skipper					57.2

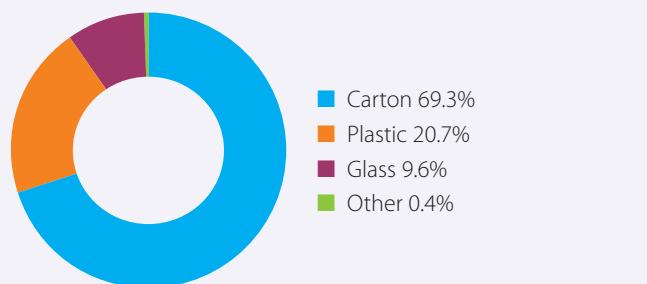
Fruit juice (100% juice content)

Total fruit juice	2013	2014	2015	2016	2017	2017 Gr%
Total fruit juice	141	133	134	118	121	2.0%
BranDED	90	84	84	72	75	3.5%
Private label	51	49	49	46	46	-0.3%
Ambient	128	121	121	104	106	1.3%
BranDED	83	78	77	64	66	2.9%
Private label	45	43	43	40	39	-1.4%
From concentrate	127	119	119	103	103	0.5%
BranDED	82	76	76	63	64	1.7%
Private label	45	43	43	40	39	-1.4%
Not from concentrate	1	1	2	2	2	49.7%
BranDED	1	1	2	2	2	49.7%
of which are smoothies	1	1	0	0	0	-93.2%
BranDED	1	1	0	0	0	-93.2%
Chilled	13	12	13	14	15	7.5%
BranDED	7	6	7	8	9	8.4%
Private label	6	6	6	6	7	6.4%
From concentrate	3	2	3	4	5	21.3%
BranDED	3	2	3	4	5	21.3%
Not from concentrate	10	10	10	10	10	1.8%
BranDED	4	4	4	4	4	-5.6%
Private label	6	6	6	6	7	6.4%
of which are smoothies	1	1	1	1	0	-52.8%
BranDED	1	1	1	1	0	-52.8%

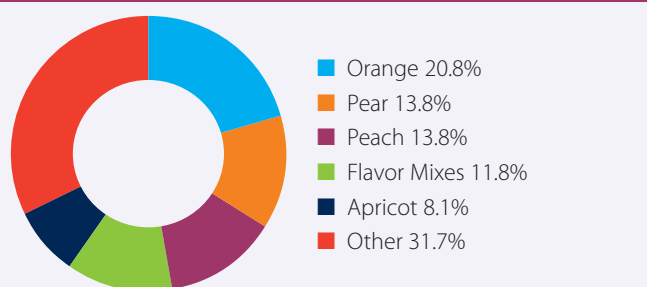
Nectars (25-99% juice content)

Total nectars	2013	2014	2015	2016	2017	2017 Gr%
Total nectars	584	557	565	541	544	0.7%
BranDED	373	351	357	339	348	2.7%
Private label	212	206	208	201	196	-2.7%
Ambient	584	557	565	541	544	0.7%
BranDED	373	351	357	339	348	2.7%
Private label	212	206	208	201	196	-2.7%
From concentrate	584	557	565	541	544	0.7%
BranDED	373	351	357	339	348	2.7%
Private label	212	206	208	201	196	-2.7%

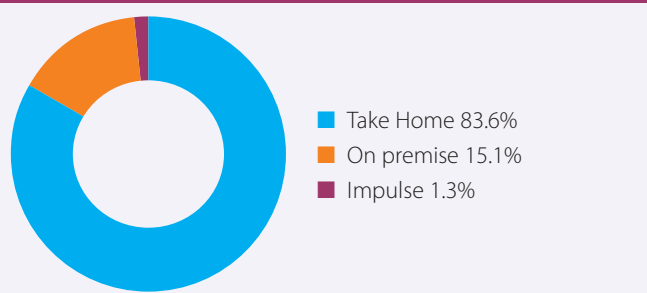
Fruit juice and nectars by packaging



Fruit juice and nectars by flavours



Fruit juice and nectars by channel



Netherlands

Population: **17.2 million**

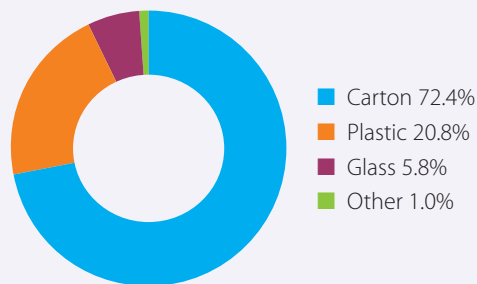
The rate of contraction in the **fruit juice** market accelerated in 2017. Frequent media reporting of the sugar content in juice has resulted in consumers being no longer able to differentiate between fruit sugars vs added sugars, and there is confusion over which is healthier. Producers need to educate consumers with regards to the production process. Whilst ambient fruit juice continues to take the brunt of the decline in consumption, since 2015 even the chilled segment has found itself challenged by sugar content perceptions, as well as premium pricing. It seems there is a lack of effective communication on wellness credentials.

Nectars shadows fruit juice, following similar trends. Consumption of both ambient and chilled nectars continued to drop in 2017. Nectars are increasingly consumed just as an occasional treat. Whilst this is positive in terms of category value, the reduced consumption opportunities point to further future declines.

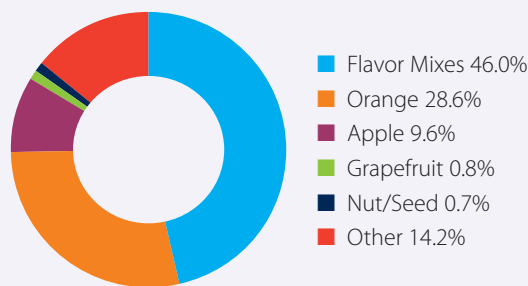
Even the growth in the tiny **smoothies** segment faltered in 2017. Prospects for smoothies made from super fruits, and particularly vegetables which consumers associate with specific health properties, are looking more promising in 2018.

“Wellness credentials need to be communicated.”

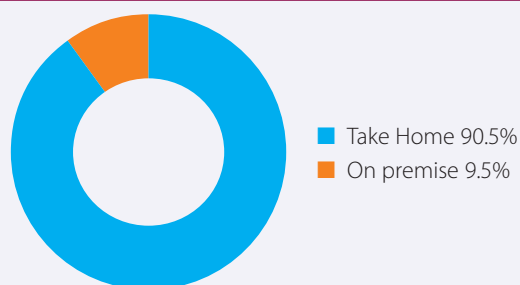
Fruit juice and nectars by packaging



Fruit juice and nectars by flavours



Fruit juice and nectars by channel



Total fruit juice and nectars

Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	464	446	431	404	369	-8.7%
Top two brands						
						2017 Vol ml
Juice	Appelsientje					35.8
	Coolbest					20.6
Nectars	Appelsientje					12.9
	Hero					9.2

Fruit juice (100% juice content)

Total fruit juice	2013	2014	2015	2016	2017	-10.1%
Branded	149	141	138	128	114	-10.4%
Private label	123	116	107	102	92	-9.7%
Ambient	185	170	156	144	128	-10.8%
Branded	95	88	82	73	65	-11.7%
Private label	90	83	74	71	64	-9.8%
From concentrate	182	165	149	136	120	-11.4%
Branded	92	82	75	66	58	-12.7%
Private label	90	82	74	70	63	-10.1%
Not from concentrate	4	6	7	8	8	0.1%
Branded	4	6	7	7	7	-1.7%
Private label	0	0	1	1	1	0.0%
Chilled	87	86	88	86	79	-8.9%
Branded	54	53	56	54	50	-8.7%
Private label	33	34	33	32	29	-9.3%
From concentrate	31	31	33	31	28	-10.6%
Branded	31	31	33	31	28	-10.6%
Not from concentrate	55	55	55	55	51	-8.0%
Branded	23	22	23	23	22	-6.2%
Private label	33	34	33	32	29	-9.3%
<i>of which are smoothies</i>	3	3	3	3	3	-4.7%
Branded	3	3	3	3	3	-4.7%

Nectars (25-99% juice content)

Total nectars	2013	2014	2015	2016	2017	-6.9%
Branded	84	80	77	71	65	-7.4%
Private label	108	110	109	103	97	-6.5%
Ambient	149	147	146	138	128	-6.7%
Branded	53	50	50	47	44	-6.5%
Private label	95	97	97	91	84	-6.8%
From concentrate	149	147	146	137	128	-6.7%
Branded	53	50	49	46	43	-6.6%
Private label	95	97	97	91	84	-6.8%
Not from concentrate	0	0	1	1	1	5.2%
Branded	0	0	1	1	1	5.2%
Chilled	43	43	40	37	34	-7.7%
Branded	31	30	27	24	22	-9.3%
Private label	12	13	13	13	12	-4.6%
From concentrate	43	43	40	37	34	-7.7%
Branded	31	30	27	24	22	-9.3%
Private label	12	13	13	13	12	-4.6%

Poland

Population: **38.4 million**

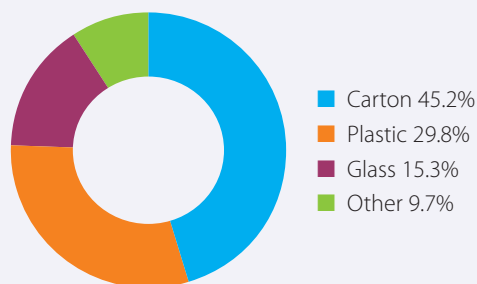
Fruit juice has been on an upwards trend since 2014 driven by the continued, and growing, consumer propensity for not from concentrate juices. Not from concentrate juice is in tune with current consumer health and wellness trends, and desire for “natural” and “fresh” consumption options. Development of not from concentrate juice has been aided by the rise in the use of aseptic PET, which allows for greater production and inclusion of less preservatives. Not from concentrate juice in “on the go” pack formats contributed strongly to 2017 volume and value growth. Both branded producers and private label are investing heavily in marketing their offerings.

Nectars recorded its first drop in volume since 2013. The category is suffering from consumer perception of not from concentrate juices as being a healthier option. Limited innovation in 2017 also impacted. With consumer interest in added-value/healthy beverages, further development of nectars offering a functional benefit offers category growth potential.

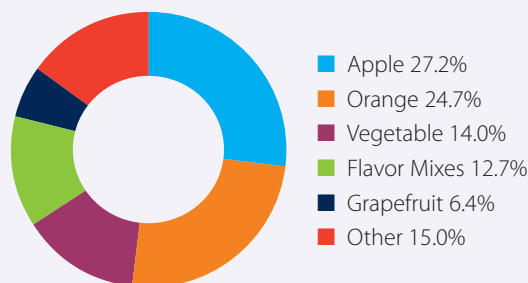
After seven years of volumes hovering around the 7-8 million litres mark, **smoothies** put on a spurt in 2017. This was driven by new entrants attracted by the success of segment leader, Marwit with its Ogrody Natury brand.

“NFC the fruit juice volume and value growth engine.”

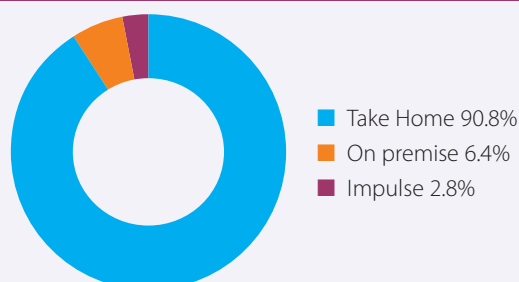
Fruit juice and nectars by packaging



Fruit juice and nectars by flavours



Fruit juice and nectars by channel



Total fruit juice and nectars

Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	673	699	757	800	820	2.5%
Top two brands						2017 Vol ml
Juice	Tymbark					91.6
	Hortex					78.7
Nectars	Tymbark					55.7
	Hortex					39.0

Fruit juice (100% juice content)

Total fruit juice	438	456	504	543	569	4.8%
Branded	381	396	426	458	477	4.1%
Private label	57	60	78	85	92	8.3%
Ambient	378	392	437	473	494	4.4%
Branded	326	338	369	401	417	4.0%
Private label	52	54	68	72	77	6.8%
From concentrate	364	371	386	391	383	-1.9%
Branded	314	320	333	344	342	-0.7%
Private label	51	51	53	47	42	-10.7%
Not from concentrate	14	21	51	82	111	34.2%
Branded	12	18	37	57	75	32.2%
Private label	2	3	15	26	35	38.8%
Chilled	60	64	67	70	75	7.2%
Branded	56	58	57	57	60	5.0%
Private label	4	6	10	13	15	16.9%
From concentrate	9	9	9	10	11	8.0%
Branded	9	9	9	9	9	4.5%
Private label	0	0	1	1	2	36.4%
Not from concentrate	51	55	57	60	64	7.1%
Branded	46	49	48	48	51	5.1%
Private label	4	6	9	12	14	15.1%
<i>of which are smoothies</i>	8	8	8	8	10	30.0%
Branded	8	8	8	8	10	30.0%

Nectars (25-99% juice content)

Total nectars	235	243	253	257	251	-2.2%
Branded	142	147	153	166	163	-1.5%
Private label	93	96	100	91	88	-3.4%
Ambient	234	243	253	257	251	-2.2%
Branded	141	147	153	166	163	-1.5%
Private label	93	96	100	91	88	-3.4%
From concentrate	234	243	253	257	251	-2.2%
Branded	141	147	153	166	163	-1.5%
Private label	93	96	100	91	88	-3.4%
Chilled	1	0	0	0	0	0.0%
Branded	1	0	0	0	0	0.0%
From concentrate	1	0	0	0	0	0.0%
Branded	1	0	0	0	0	0.0%

Spain

Population: **46.5 million**

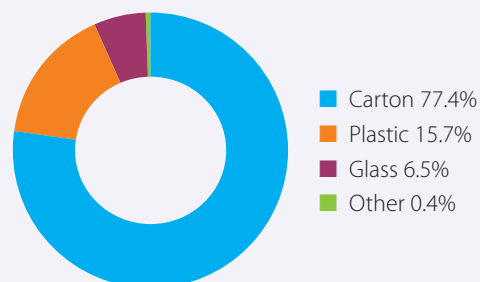
The **fruit juice** market is being driven by the growing consumer propensity for chilled juice. Although chilled juice accounts for less than one-fifth of the total fruit juice market, both branded and private label registered double-digit growth rates at the expense of ambient in 2017. A notable influence in 2017 was retailer Mercadona's freshly squeezed juices – self-squeezed and then packaged and bar coded. This option, present for a long time and very widespread in bars, has been quickly followed by other retailers.

Both fruit juice and **nectars** suffer from competition from categories such as flavoured water and iced/RTD tea drinks, but nectars continued to slide in 2017. As in fruit juice it is the chilled and premium products that are providing the stimulus. However, competition from chilled and premium fruit juice is also impacting. Elementary school children will remain the key target of the main nectars brands with personalised pack designs, while young adults will be targetted with emerging segments such as smoothies and vegetable-based offerings. Life-style changes are favouring more development of single-serve packs over family formats.

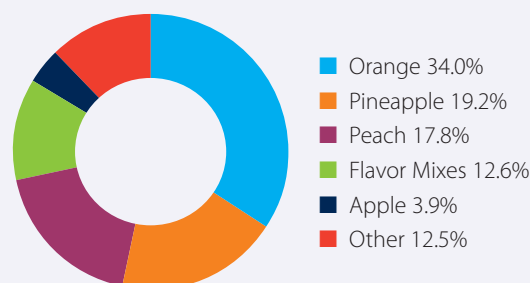
Smoothies is still a minute sub-segment, but consumer interest is growing, driven by health and wellness trends.

“Growing propensity for chilled and premium fruit juices.”

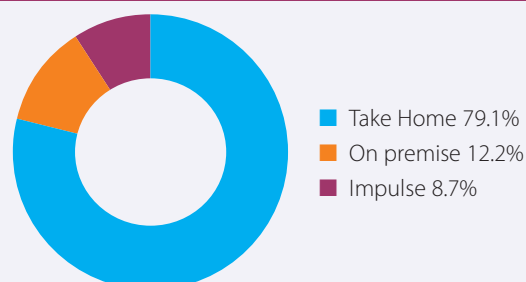
Fruit juice and nectars by packaging



Fruit juice and nectars by flavours



Fruit juice and nectars by channel



Total fruit juice and nectars

Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	926	910	886	831	808	-2.7%
Top two brands						2017 Vol ml
Juice	Don Simon					86.6
	Juver					38.4
Nectars	Don Simon					141.6
	Juver					40.5

Fruit juice (100% juice content)

	2013	2014	2015	2016	2017	16-17Gr%
Total fruit juice	394	376	366	367	369	0.5%
Branded	216	221	204	200	200	0.4%
Private label	178	155	162	168	169	0.8%
Ambient	350	333	323	319	302	-5.4%
Branded	197	201	186	178	172	-3.4%
Private label	153	132	136	141	130	-7.9%
From concentrate	273	253	240	236	221	-6.3%
Branded	162	161	147	140	135	-4.1%
Private label	111	91	93	96	87	-9.4%
Not from concentrate	77	80	82	83	81	-2.9%
Branded	35	40	39	38	38	-0.5%
Private label	42	40	43	46	43	-4.8%
Chilled	44	43	43	48	67	40.0%
Branded	20	20	18	21	28	31.4%
Private label	25	23	25	27	39	47.0%
From concentrate	7	4	3	3	2	-39.7%
Branded	0	0	0	0	0	0.0%
Private label	7	4	3	3	2	-39.7%
Not from concentrate	37	38	40	45	65	45.2%
Branded	19	20	18	21	28	31.4%
Private label	18	19	22	24	37	57.6%
<i>of which are smoothies</i>					0	0.0%
Branded					0	0.0%

Nectars (25-99% juice content)

	2013	2014	2015	2016	2017	16-17Gr%
Total nectars	532	535	521	464	439	-5.3%
Branded	334	342	330	292	274	-6.2%
Private label	198	193	190	171	165	-3.9%
Ambient	531	533	518	460	436	-5.4%
Branded	334	340	328	290	272	-6.3%
Private label	197	193	190	171	164	-4.0%
From concentrate	531	533	518	460	435	-5.4%
Branded	333	340	328	290	272	-6.3%
Private label	197	193	190	171	164	-4.0%
Not from concentrate					0	0.0%
Branded					0	0.0%
Chilled	1	2	2	3	3	4.7%
Branded	1	1	2	2	2	1.3%
Private label	0	0	0	1	1	13.6%
From concentrate						0.0%
Branded						0.0%
Not from concentrate	1	2	2	3	3	4.7%
Branded	1	1	2	2	2	1.3%
Private label	0	0	0	1	1	13.6%
<i>of which are smoothies</i>	0	0	0	1	1	27.5%
Branded	0	0	0	0	0	45.5%
Private label	0	0	0	1	1	25.0%

Sweden

Population: **10.1 million**

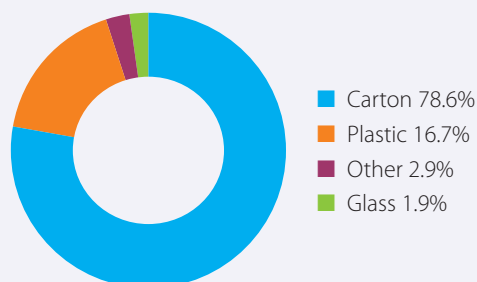
Whilst the overall **fruit juice** market continues on its long-term downwards trend, chilled and not from concentrate juices continued to take share from ambient in 2017; a reflection of consumer interest in quality rather than quantity. Younger consumers are increasingly skipping breakfast during the week and having a more indulgent breakfast at the weekends. This is helping to drive premium brands and push up average prices. There is a shift away from large pack formats to smaller sizes, reflecting the trend to premium fruit juice. Cartons are losing out to PET as premium products opt for PET packaging.

Nectars remained almost flat in 2017; a performance which can be attributed to a revival in the sales of ProViva (Danone Group), new listings for Glockengold and strong growth in the smoothies segment. Prospects are improving for the nectars category which is becoming more diverse and innovative, and less reliant on the struggling ambient private label segment.

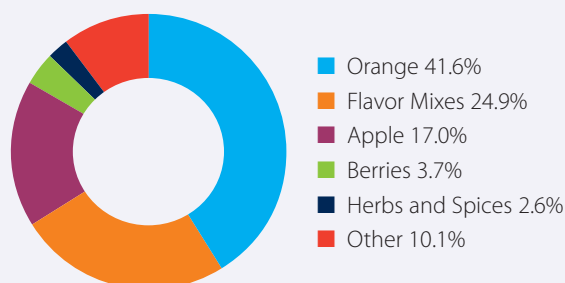
Smoothies is still a small presence, but saw strong growth in 2017 boosted by new launches for Bramhults (Eckes-Granini) and Bravo (Lactalis), and the success of the Innocent (TCCC) functional range. The launch of Bravo has changed the smoothies landscape, making them more affordable and mainstream.

“Consumer interest in quality rather than quantity.”

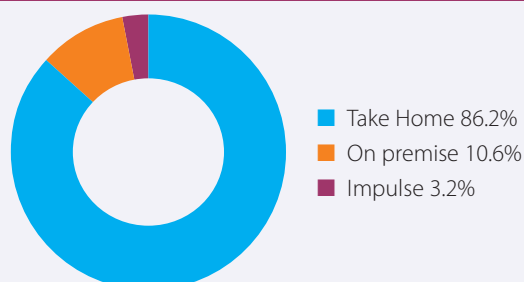
Fruit juice and nectars by packaging



Fruit juice and nectars by flavours



Fruit juice and nectars by channel



Total fruit juice and nectars

Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	238	233	233	225	217	-3.6%
Top two brands						2017 Vol ml
Juice	Bravo (Skanemejerier)					54.7
	God Morgon					22.8
Nectars	ProViva					17.2
	Glockengold					9.8

Fruit juice (100% juice content)

Total fruit juice	183	176	175	169	161	-4.8%
Branded	145	138	139	136	130	-4.2%
Private label	38	37	36	33	31	-6.9%
Ambient	50	47	45	42	38	-9.7%
Branded	26	25	24	23	22	-4.7%
Private label	24	22	21	19	16	-15.6%
From concentrate	48	44	41	39	35	-10.5%
Branded	23	22	20	20	19	-5.6%
Private label	24	22	21	19	16	-15.6%
Not from concentrate	3	3	3	3	3	0.6%
Branded	3	3	3	3	3	0.6%
<i>of which are smoothies</i>	1	1	2	2	2	-5.9%
Branded	1	1	2	2	2	-5.9%
Chilled	133	129	130	127	123	-3.1%
Branded	118	114	116	113	108	-4.1%
Private label	14	15	14	14	15	4.9%
From concentrate	106	101	97	92	89	-3.3%
Branded	95	89	86	82	78	-4.8%
Private label	11	12	11	11	12	7.9%
Not from concentrate	27	27	33	34	34	-2.6%
Branded	23	24	30	31	30	-2.4%
Private label	3	3	3	3	3	-4.9%
<i>of which are smoothies</i>	1	1	2	1	2	21.5%
Branded	1	1	1	1	1	11.3%
Private label	0	0	0	0	0	63.6%

Nectars (25-99% juice content)

Total nectars	55	58	58	56	56	-0.1%
Branded	39	44	46	44	45	2.0%
Private label	16	14	12	12	11	-8.0%
Ambient	33	35	36	34	32	-5.9%
Branded	21	24	27	26	24	-5.2%
Private label	12	11	9	9	8	-7.8%
From concentrate	33	35	36	34	32	-5.9%
Branded	21	24	27	26	24	-5.2%
Private label	12	11	9	9	8	-7.8%
<i>of which are smoothies</i>	0	0	0	0	0	-7.3%
Branded	0	0	0	0	0	26.8%
Private label	0	0	0	0	0	-9.1%
Chilled	22	23	22	21	23	9.3%
Branded	19	20	19	18	21	12.1%
Private label	3	3	3	3	3	-8.9%
From concentrate	22	23	22	21	23	8.7%
Branded	19	20	19	18	20	11.4%
Private label	3	3	3	3	3	-8.9%
Not from concentrate	0	0	0	0	1	44.0%
Branded	0	0	0	0	1	44.0%
<i>of which are smoothies</i>				0	1	190.7%
Branded				0	1	190.7%

United Kingdom

Population: **66.0 million**

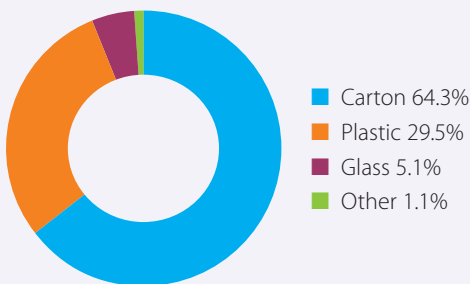
The backlash against sugar continued to stifle growth in the **fruit juice** market. Promotional deals in retail also changed with fewer multi-buy offers in evidence, and retailers allocating more shelf space to waters. Whilst fruit juice is exempt from the sugar tax, it is notable that some brands have increased their use of vegetables as a way to reduce sugar content. The cold pressed fruit juice segment is still emerging, but faster progress is being curtailed as some consumers perceive them to be too expensive. The growth in coconut waters stalled in 2017 undermined by competition from smoothies in particular, and less space allocation by retailers. Fruit juice prices increased throughout the year due to raw material price hikes and inflationary pressures.

Nectars experienced the same negative influences as fruit juice, with smoothies providing the bright spot, thanks to consumer demand for functionality and producer new product activity. Many brands were reformulated during the year in a bid to lower sugar content, as unlike fruit juice, nectars will be subject to the Soft Drinks Industry Levy in 2018.

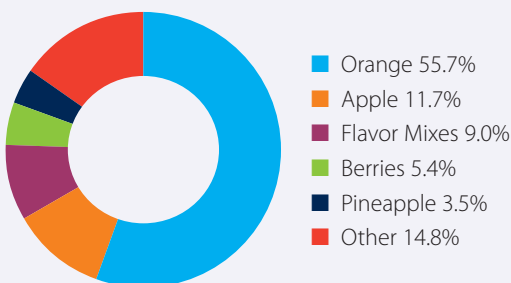
Smoothies registered strong growth in 2017 driven by consumer demand for functionality in beverages, and new flavours and vegetable blends entering the market. The premiumisation trend was also a key factor as consumers traded up.

“Premiumisation trend driving smoothies.”

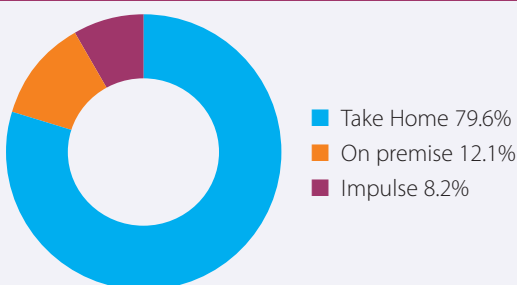
Fruit juice and nectars by packaging



Fruit juice and nectars by flavours



Fruit juice and nectars by channel



Total fruit juice and nectars

Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	1,275	1,190	1,138	1,106	1,079	-2.4%
Top two brands						2017 Vol ml
Juice	Tropicana					125.3
	Innocent					109.1
Nectars	J2O					42.2
	Ocean Spray					22.5

Fruit juice (100% juice content)

Total fruit juice	1,079	996	945	918	898	-2.2%
Branded	505	476	418	413	395	-4.4%
Private label	574	519	527	505	503	-0.4%
Ambient	395	352	353	312	302	-3.2%
Branded	113	97	87	68	65	-5.0%
Private label	282	255	266	243	237	-2.7%
From concentrate	395	352	353	311	301	-3.1%
Branded	113	97	87	68	65	-4.8%
Private label	282	255	266	243	237	-2.7%
Not from concentrate	0	0	0	1	0	-40.0%
Branded	0	0	0	1	0	-40.0%
Chilled	684	644	592	606	596	-1.7%
Branded	392	379	331	344	330	-4.3%
Private label	292	264	260	262	266	1.7%
From concentrate	242	221	224	228	240	5.1%
Branded	16	15	14	13	15	15.5%
Private label	226	206	210	215	224	4.4%
Not from concentrate	442	422	368	378	356	-5.7%
Branded	376	364	318	331	314	-5.1%
Private label	65	58	50	47	42	-10.5%
<i>of which are smoothies</i>	54	52	43	45	50	10.6%
Branded	49	47	39	41	46	12.2%
Private label	5	5	5	4	4	-6.0%

Nectars (25-99% juice content)

Total nectars	196	194	193	188	181	-3.6%
Branded	175	175	174	171	166	-3.4%
Private label	21	19	19	17	16	-5.9%
Ambient	138	150	153	141	126	-10.4%
Branded	132	144	148	135	121	-10.5%
Private label	6	6	5	6	5	-7.3%
From concentrate	136	141	144	131	117	-10.8%
Branded	130	136	139	125	112	-10.9%
Private label	6	6	5	6	5	-7.3%
Not from concentrate	2	9	9	10	9	-5.5%
Branded	2	9	9	10	9	-5.5%
Chilled	57	44	39	47	55	16.4%
Branded	43	30	26	37	45	22.9%
Private label	15	13	13	11	10	-5.2%
From concentrate	43	34	30	38	47	23.8%
Branded	29	20	17	27	37	35.2%
Private label	15	13	13	11	10	-5.2%
Not from concentrate	14	10	9	9	8	-13.9%
Branded	14	10	9	9	8	-13.9%
<i>of which are smoothies</i>	16	16	15	21	27	32.7%
Branded	10	10	9	15	21	45.3%
Private label	6	6	6	6	6	0.7%



Bulgaria

Population: **7.0 million**

Fruit juice consumption registered a very marginal increase in 2017, with premium brands and the development of the NFC segment the key drivers of both volume and value. Smoothies offerings are limited, but are growing with rising consumer interest in more premium offerings. Private label presence is low as retailers seek to capitalise on the high level of investment by the major producers in their branded offerings.

Nectars continued to lose out to still drinks in 2017 as the leading JNSD producers focused on their still drinks portfolios. This shift in volume to still drinks, and to a lesser extent fruit juice, is expected to be witnessed again in 2018. Within the flavour profile, aloe vera is growing in popularity despite no significant investment from the major producers thanks to its health halo.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	63	64	62	61	58	-4.6%
Top two brands						2017 Vol ml
Juice	Cappy					2.0
	Pfanner					1.7
Nectars	Cappy					15.1
	Queens					4.4

Fruit juice (100% juice content)

Total fruit juice	14	14	14	13	13	0.1%
Branded	12	13	12	12	12	0.6%
Private label	2	2	1	1	1	-4.6%
Ambient	14	14	13	13	13	-0.3%
Chilled	0	0	0	0	0	17.2%
From concentrate	13	13	12	11	11	-1.7%
Not from concentrate	1	2	2	2	2	10.0%

Nectars (25-99% juice content)

Total nectars	49	49	49	48	45	-5.9%
Branded	41	41	42	42	39	-6.4%
Private label	8	8	7	6	5	-2.2%



Croatia

Population: **4.2 million**

Fruit juice is virtually entirely ambient, with chilled variants still a negligible presence – higher distribution costs are curtailing progress. Not from concentrate fruit juice now accounts for nearly one-fifth of the market vs just 3% in 2013. Growth, however slowed in 2017 impacted by leading retailer, Konzum's performance due to its owner's (Agrokor) financial crisis. Private label, mainly distributed through international chains and discounters such as Kaufland and Lidl, strongly outperformed brands in growth terms driven by value for money appeal.

Nectars recorded another year of decline. Hampered by a lack of marketing and new product development, the category is losing out to lower cost still drinks which are also carton packed. The prominence of carton packaging for nectars is also an obstacle in harnessing 'on the go' consumption opportunities.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	67	57	56	55	54	-1.9%
Top two brands						2017 Vol ml
Juice	Juicy					3.7
	Cappy					1.2
Nectars	To					9.5
	Vindi					4.7

Fruit juice (100% juice content)

Total fruit juice	12	13	14	14	14	1.0%
Branded	10	11	12	11	11	-0.5%
Private label	2	3	2	3	3	7.0%
Ambient	12	13	14	14	14	1.0%
From concentrate	12	11	12	12	12	0.0%
Not from concentrate	0	2	2	2	3	5.8%

Nectars (25-99% juice content)

Total nectars	55	44	42	41	39	-2.8%
Branded	46	37	36	35	34	-3.3%
Private label	9	7	6	5	5	0.1%



Cyprus

Population: **0.9 million**

Despite the booming economy in Cyprus in 2017 and a highly resilient tourism sector, there was no respite from the declining consumption trend for **fruit juice** and **nectars**. Only the tiny private label segment bucked the trend. Both ambient and chilled fruit juice suffered equally from consumer perception of their high sugar content. Sales of on-premise fruit juice and nectars received some benefit from the growth in tourism, but the market remains heavily skewed to off-premise consumption. Production, however, continues to increase with producers looking to grow their export markets. Cyprus is a leading exporter of not from concentrate orange, apple and pineapple juices to China, in addition to from concentrate orange juice.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	30	29	28	28	26	-5.0%

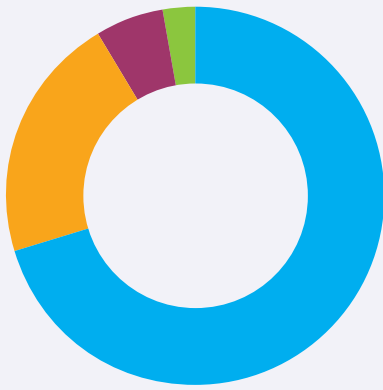
Fruit juice (100% juice content)

Total fruit juice	19	18	18	17	16	-7.5%
Branded	18	17	17	17	15	-10.1%
Private label	1	1	1	1	1	47.3%
Ambient	18	18	17	17	15	-7.4%
Chilled	1	1	1	1	1	-3.3%
From concentrate	19	18	18	17	16	-7.3%

Nectars (25-99% juice content)

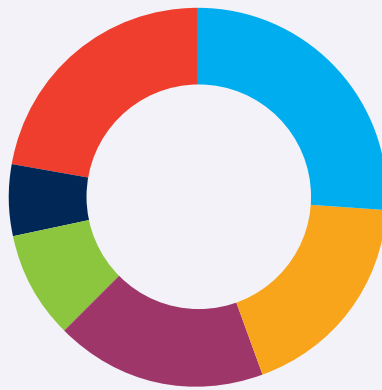
Total nectars	11	10	10	10	10	-0.7%
Branded	10	10	10	10	9	-6.3%
Private label	1	1	1	0	1	46.0%

Fruit juice and nectars by packaging



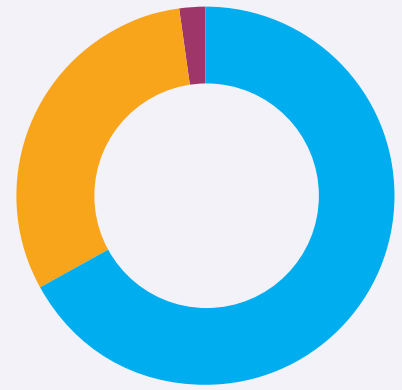
■ Carton 70.6% ■ Plastic 5.9%
 ■ Glass 21.2% ■ Other 2.4%

Fruit juice and nectars by flavours



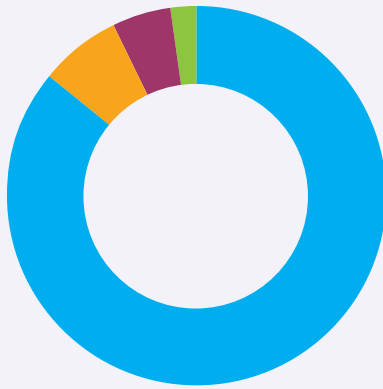
■ Orange 26.2% ■ Apricot 9.4%
 ■ Peach 17.8% ■ Flavor Mixes 6.3%
 ■ Apple 17.8% ■ Other 22.5%

Fruit juice and nectars by channel



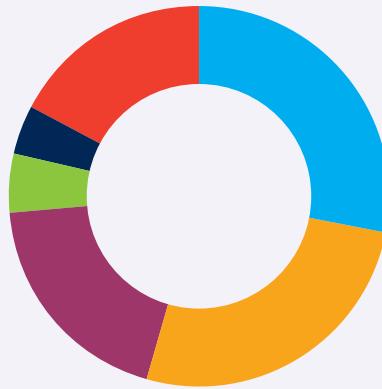
■ Take Home 67.0%
 ■ On premise 31.1%
 ■ Impulse 1.9%

Fruit juice and nectars by packaging



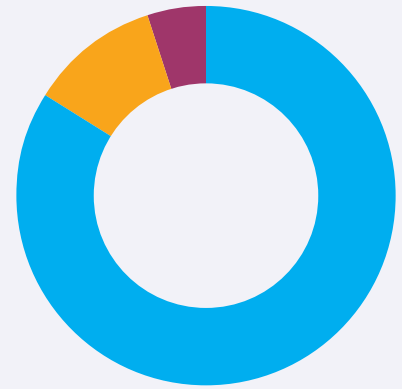
■ Carton 86.7% ■ Other 4.5%
 ■ Glass 6.7% ■ Plastic 2.1%

Fruit juice and nectars by flavours



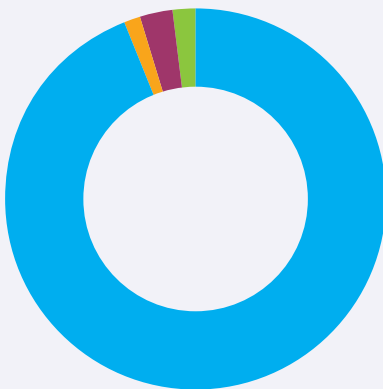
■ Orange 28.4% ■ Peach 5.4%
 ■ Apple 26.5% ■ Apricot 3.8%
 ■ Flavor Mixes 19.3% ■ Other 16.6%

Fruit juice and nectars by channel



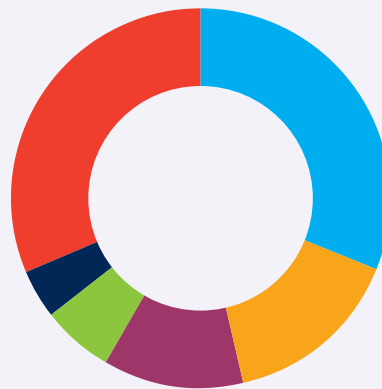
■ Take Home 84.0%
 ■ On premise 11.3%
 ■ Impulse 4.7%

Fruit juice and nectars by packaging



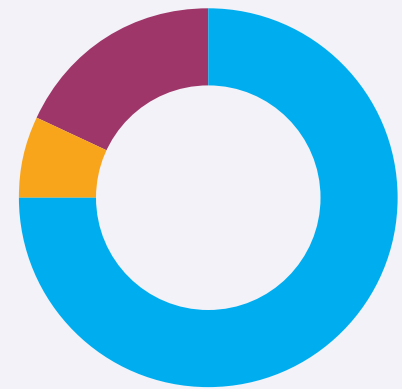
■ Carton 94.1% ■ Glass 3.0%
 ■ Plastic 1.2% ■ Other 1.7%

Fruit juice and nectars by flavours



■ Orange 31.6% ■ Pineapple 5.6%
 ■ Flavor Mixes 15.2% ■ Grapefruit 3.9%
 ■ Apple 12.4% ■ Other 31.3%

Fruit juice and nectars by channel



■ Take Home 74.8%
 ■ Impulse 7.0%
 ■ On Premise 18.2%

Czech Republic Population: 10.6 million

The **fruit juice** market continued to record buoyant growth in 2017 driven by increasing consumer interest in healthy fruit-based beverages. Rising disposable income levels has fuelled demand for better quality not from concentrate and chilled products, pushing up branded sales at the expense of private label. Fruit juice offering functional benefits performed strongly, albeit on a low base. Small sized PET bottles targetting "on the go" convenience are growing in popularity.

Similar trends were seen in **nectars** with higher juice content, better quality products and products enhanced with vitamins being favoured. Exotic mixed fruit flavours also gained in popularity. Price increases implemented by many of the major players and a lower level of discounting activity in retail than in 2016 pushed up average prices in 2017.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	89	93	101	108	115	6.6%
Top two brands						2017 Vol ml
Juice	Relax					15.7
	Cappy					6.9
Nectars	Relax					15.4
	Cappy					5.9

Fruit juice (100% juice content)

Total fruit juice	51	55	59	64	69	7.4%
Branded	37	41	44	48	52	7.6%
Private label	15	14	15	15	16	6.6%
Ambient	50	54	58	63	66	5.6%
Chilled	1	1	1	1	3	87.6%
From concentrate	48	51	55	59	62	6.0%
Not from concentrate	3	4	5	5	6	23.6%

Nectars (25-99% juice content)

Total nectars	37	38	42	44	46	5.4%
Branded	27	28	31	34	36	5.8%
Private label	11	10	11	10	10	4.0%

Denmark Population: 5.8 million

Fruit juice consumption contracted in 2017. Whilst a cold wet summer will not have helped, there is a strong trend to drinking less juice, but better quality. Volumes were also impacted by the continuing trend to forego breakfast. Despite the fall in consumption the value of the fruit juice market is growing with the rise in demand for more premium products. Branded competition in the chilled segment is intensifying, and retailers are increasing shelf space. The popularity of the Joe & Juice chain has helped to raise the profile of fruit juice in on-premise.

There is no real culture of drinking **nectars** in Denmark and volumes dropped back steeply in 2017. Products with lower sugar content have failed to capture a big audience, despite consumer concerns over sugar content.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	111	108	106	106	104	-2.5%
Top two brands						2017 Vol ml
Juice	Rynkeby					13.0
	16 Range					6.0
Nectars	Rynkeby					1.8
	Innocent					0.5

Fruit juice (100% juice content)

Total fruit juice	109	103	100	101	99	-1.9%
Branded	54	53	52	53	48	-8.7%
Private label	54	49	47	46	48	3.8%
Unbranded	1	1	1	2	3	45.2%
Ambient	98	90	87	86	83	-2.9%
Chilled	12	13	14	15	15	3.9%
From concentrate	98	91	85	83	79	-4.3%
Not from concentrate	12	12	15	18	20	9.2%

Nectars (25-99% juice content)

Total nectars	1	4	6	6	5	-12.1%
Branded	1	4	5	4	3	-21.0%
Private label	0	1	1	1	2	16.1%

Estonia Population: 1.3 million

The trend to drinking more value-added **fruit juice** such as freshly squeezed juices and smoothies, continued to drive the chilled segment to the detriment of ambient juice. Price increases in the second half of the year, due to the hike in concentrate prices in the wake of the poor harvest caused by the unusually cool summer, contributed to the overall decline in fruit juice consumption in 2017.

Nectars continued the long-term trend of decline, with consumers increasingly migrating to perceived healthier fruit juice or to the lower cost still drinks category which saw increased numbers of flavour variants entering the market. Although still marginal, vegetable-based nectars are in tune with the health trend and registered notable growth, boosted by the launch of new products featuring carrot and beetroot.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	26	25	25	24	22	-9.1%
Top two brands						2017 Vol ml
Juice	Aura					2.8
	Poltsamaa					1.5
Nectars	Aura					4.3
	Poltsamaa					2.1

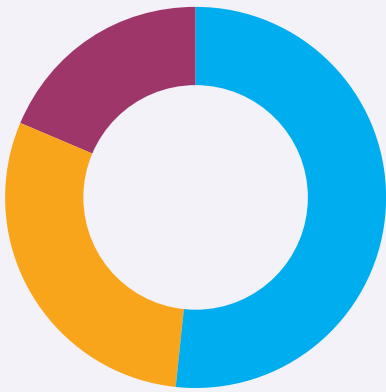
Fruit juice (100% juice content)

Total fruit juice	12	12	12	13	13	-3.8%
Branded	10	10	10	11	11	-2.8%
Private label	2	2	2	2	2	-9.3%
Ambient	12	12	12	12	12	-4.9%
Chilled	1	1	1	1	1	13.1%
From concentrate	11	11	11	12	11	-4.4%
Not from concentrate	1	1	1	1	1	1.8%

Nectars (25-99% juice content)

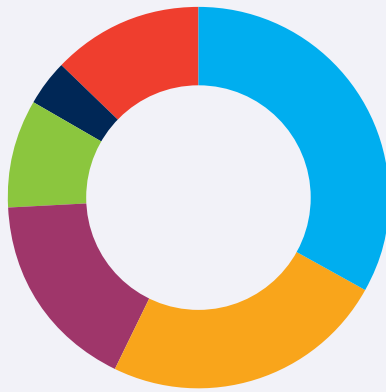
Total nectars	14	13	12	11	9	-15.6%
Branded	13	12	12	10	9	-15.6%
Private label	1	1	1	1	1	-15.1%

Fruit juice and nectars by packaging



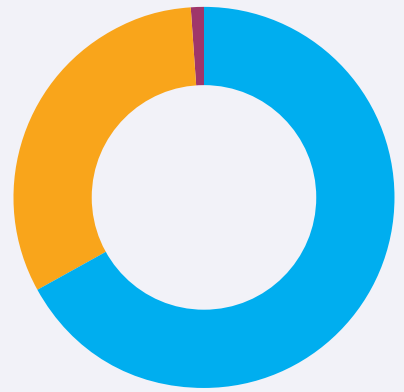
Carton 72.8%
Plastic 13.9%
Glass 8.5%
Other 4.9%

Fruit juice and nectars by flavours



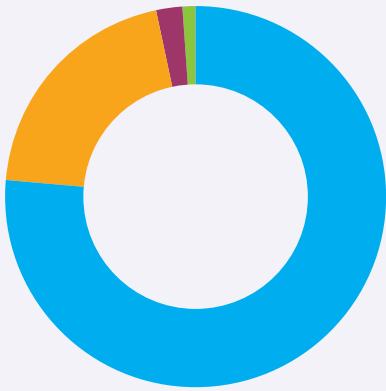
Orange 33.1%
Apple 24.2%
Flavor Mixes 17.1%
Other 12.5%
Berries 9.3%
Grapefruit 3.8%

Fruit juice and nectars by channel



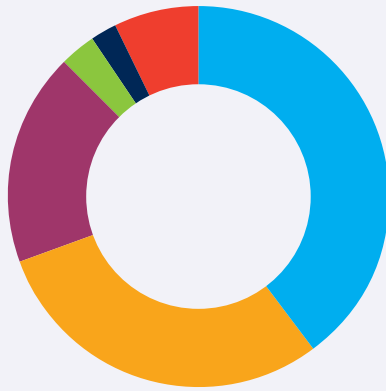
Take Home 67.3%
On premise 31.7%
Impulse 0.9%

Fruit juice and nectars by packaging



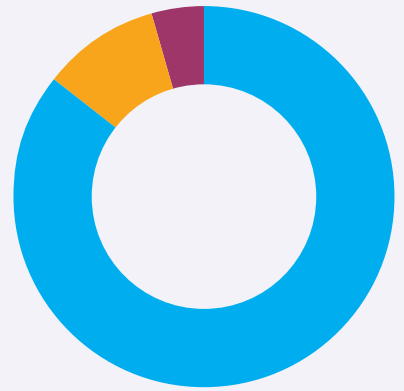
Carton 76.5%
Plastic 20.2%
Glass 2.3%
Other 1.0%

Fruit juice and nectars by flavours



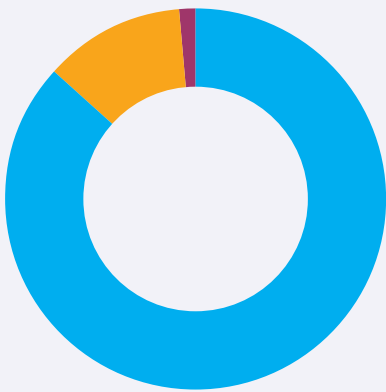
Orange 40.0%
Apple 29.7%
Flavor Mixes 18.0%
Other 7.0%
Pineapple 2.9%
Grapefruit 2.4%

Fruit juice and nectars by channel



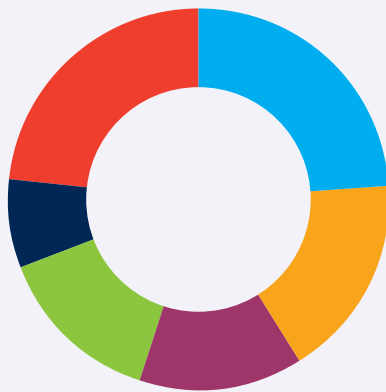
Take Home 86.2%
On premise 9.6%
Impulse 4.2%

Fruit juice and nectars by packaging



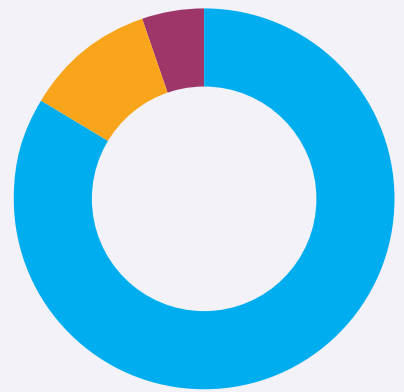
Carton 86.9%
Plastic 11.8%
Glass 1.3%

Fruit juice and nectars by flavours



Orange 23.8%
Apple 17.0%
Flavor Mixes 14.5%
Other 23.0%
Tomato 14.1%
Plum 7.6%

Fruit juice and nectars by channel



Take Home 83.5%
On premise 11.2%
Impulse 5.3%

Finland

Population: **5.5 million**

Fruit juice suffered badly following the 2014 soft drinks tax hike (to 22 cents/litre) and has far from recovered. Media highlighting of the high sugar content in juice is exacerbating the decline, prompting further consumer migration to lower calorie alternatives and especially beverages offering a perceived benefit; such as packaged water and enhanced/functional beverages. Fewer retail listings and low new product activity are also having an impact. Producers need to focus on the potential of value added offerings such as organic juice, super fruits and smoothies.

Nectars continued to suffer from competition from plain, flavoured and enhanced waters and juice drinks in 2017. To date consumers have not really appreciated the difference between nectars and fruit juice and have tended to buy on price. However, nectars saw significant new product activity in 2017, particularly around organic and wellness drinks, which is starting to create a more independent identity for the category.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	112	103	99	97	93	-4.1%
Top two brands						2017 Vol ml
Juice	Rainbow (PL)					15.0
	Marli					14.0
Nectars	Marli					8.7
	Valio					5.8

Fruit juice (100% juice content)

Total fruit juice	97	89	86	84	81	-4.3%
Branded	62	57	53	51	47	-8.1%
Private label	35	32	33	33	34	1.5%
Ambient	55	52	50	50	48	-2.8%
Chilled	42	38	36	35	32	-6.3%
From concentrate	85	79	76	79	74	-6.2%
Not from concentrate	12	10	9	5	7	23.8%

Nectars (25-99% juice content)

Total nectars	15	13	13	12	12	-2.9%
Branded	14	13	12	12	11	-4.6%
Private label	0	0	0	0	1	54.6%

Greece

Population: **10.7 million**

Fruit juice consumption picked up again in 2017 with the chilled segment providing the primary impetus. Whilst Greek consumers remain generally price-sensitive, they are seemingly willing to pay for a product with a proven health benefit. Producers are focusing on promoting the naturalness of their fruit juices. A buoyant tourist market also played a part in boosting volumes in 2017.

Nectars delivered a flat performance in 2017. Consumer sugar content concerns have impacted on consumption in recent years. The chilled segment proved more resilient thanks to its affordability versus fruit juice alternatives, sustained marketing by the major producers, and tourist consumption.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	137	131	131	127	130	2.5%
Top two brands						2017 Vol ml
Juice	Amita					31.3
	Olympos					7.1
Nectars	Amita					22.7
	Life					7.0

Fruit juice (100% juice content)

Total fruit juice	78	73	72	70	73	3.8%
Branded	61	58	58	58	60	4.5%
Private label	17	15	14	12	13	0.6%
Ambient	64	60	58	56	58	3.5%
Chilled	14	14	14	14	15	5.2%
From concentrate	78	72	71	69	72	3.8%
Not from concentrate	0	1	1	1	1	8.5%

Nectars (25-99% juice content)

Total nectars	59	58	59	57	57	0.8%
Branded	44	42	43	42	43	1.2%
Private label	15	16	15	14	14	-0.5%

Hungary

Population: **9.8 million**

Fruit juice consumption picked up again in 2017 after a dip in 2016, driven by consumer demand for more premium juices. Not from concentrate juice strongly outperformed the from concentrate segment in growth terms; heavy investment by the major players was a key influencer. Overall, despite growth in the premium segment, large scale price promotions lowered category value. Orange, apple and mixed fruit remained the key flavour variants of choice.

Nectars registered healthy growth in 2017 thanks to heavy investment in portion-sized packaging. Premium offerings, including organic, are becoming available but are still niche. Growth in smaller packs was off-set by strong discounting activity. The category remains heavily skewed to peach, mixed fruit and apple flavours.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	91	101	115	124	130	5.4%
Top two brands						2017 Vol ml
Juice	Cappy					9.2
	Hohes C					7.3
Nectars	Sio					24.7
	Cappy					13.8

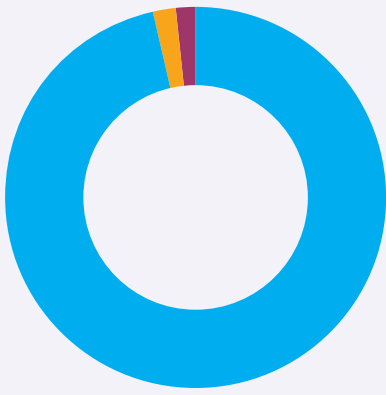
Fruit juice (100% juice content)

Total fruit juice	36	40	44	43	44	2.9%
Branded	9	11	11	10	11	1.4%
Private label	27	28	33	33	34	3.4%
Ambient	36	40	44	43	44	2.9%
Chilled	0	0	0	0	0	1.5%
From concentrate	35	38	41	41	42	2.6%
Not from concentrate	1	1	2	2	2	8.7%

Nectars (25-99% juice content)

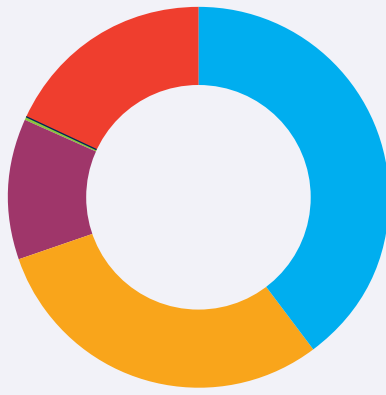
Total nectars	55	61	71	80	86	6.7%
Branded	34	36	52	63	69	10.5%
Private label	21	26	19	18	17	-6.4%

Fruit juice and nectars by packaging



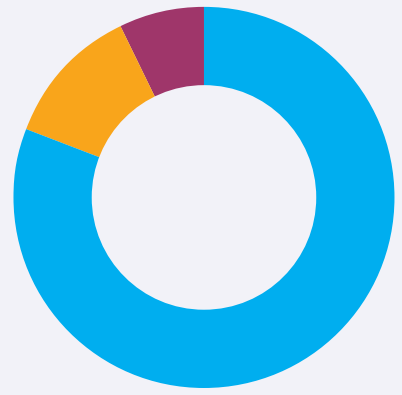
■ Carton 96.8%
 ■ Plastic 1.8%
 ■ Glass 1.4%

Fruit juice and nectars by flavours



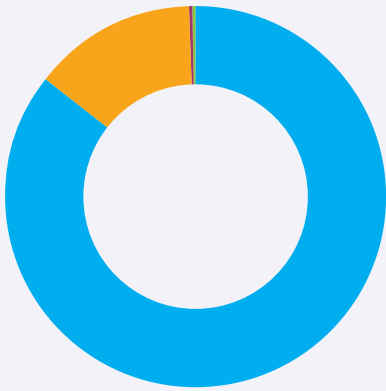
■ Orange 39.8% ■ Pineapple 0.2%
 ■ Flavor Mixes 29.5% ■ Grapefruit 0.1%
 ■ Apple 11.9% ■ Other 18.5%

Fruit juice and nectars by channel



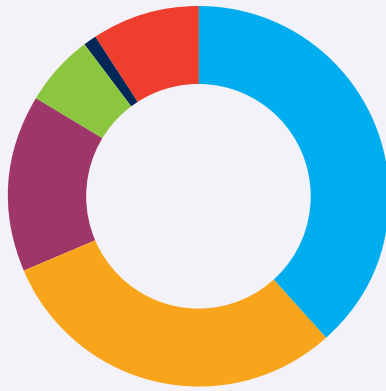
■ Take Home 81.2%
 ■ On premise 11.9%
 ■ Impulse 6.9%

Fruit juice and nectars by packaging



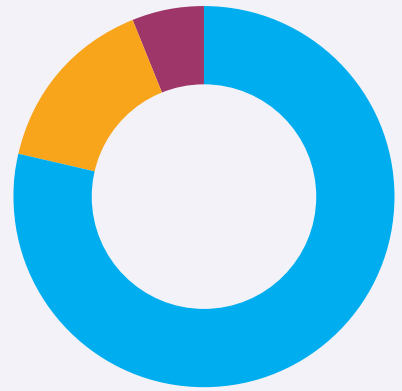
■ Carton 86.0% ■ Glass 0.2%
 ■ Plastic 13.7% ■ Other 0.2%

Fruit juice and nectars by flavours



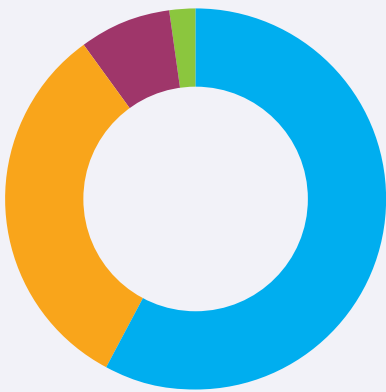
■ Orange 38.2% ■ Peach 6.1%
 ■ Apple 30.5% ■ Berries 1.0%
 ■ Flavor Mixes 15.2% ■ Other 9.0%

Fruit juice and nectars by channel



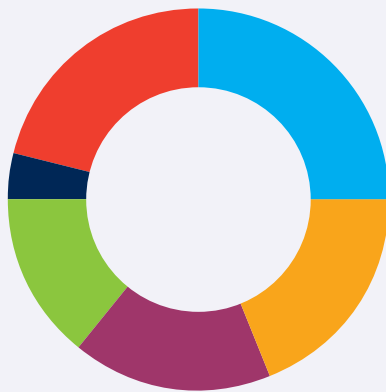
■ Take Home 78.4%
 ■ On premise 15.1%
 ■ Impulse 6.5%

Fruit juice and nectars by packaging



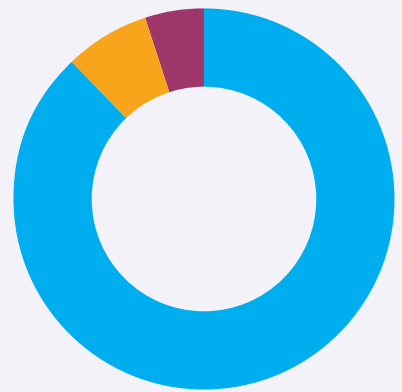
■ Carton 58.0% ■ Glass 8.1%
 ■ Plastic 32.3% ■ Other 1.7%

Fruit juice and nectars by flavours



■ Orange 24.9% ■ Flavor Mixes 14.1%
 ■ Apple 19.1% ■ Pear 4.0%
 ■ Peach 16.8% ■ Other 21.1%

Fruit juice and nectars by channel



■ Take Home 87.9%
 ■ On premise 7.4%
 ■ Impulse 4.7%

Latvia

Population: **1.9 million**

Fruit juice consumption, despite a hike in prices due to increased concentrate prices following a cold wet summer which impacted on the harvest, continued to grow. The estimated yield of berries and fruits is 40-80% lower than in 2016; most affected were redcurrants, blackcurrants and cherries. Rising consumer confidence and increased disposable income levels are supporting a growing trend to consuming more premium fruit juices and smoothies.

Consumers are increasingly opting for fruit juice over **nectars** as they are not only perceived as healthier, but there is also essentially little difference in price between the two. The increase in concentrate prices saw producers focusing their activities on still drinks rather than nectars, in order to harness some value gain. Smaller sized nectars packs targetted at the children's segment, however, bucked the trend, lessening the overall category decline.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	29	29	28	29	28	-2.8%
Top two brands						2017 Vol ml
Juice	Cido					5.5
	Gutta					1.1
Nectars	Cido					8.3
	Gutta					4.2

Fruit juice (100% juice content)

Total fruit juice	11	11	11	11	11	2.0%
Branded	10	10	10	10	11	2.0%
Private label	1	1	1	1	1	2.1%
Ambient	10	10	11	11	11	1.4%
Chilled	0	0	0	0	0	41.3%
From concentrate	10	10	11	11	11	1.4%
Not from concentrate	0	0	0	0	0	48.2%

Nectars (25-99% juice content)

Total nectars	19	19	17	18	17	-5.8%
Branded	17	17	16	16	15	-6.1%
Private label	1	1	1	1	1	-2.4%

Lithuania

Population: **2.8 million**

Fruit juice is on a declining trend undermined by consumer perception of the sugar content in juice, a falling population base and price increases. Whilst the chilled segment remains niche, consumer interest in more premium offerings with proven benefits is growing. Overall, the best performing segment in 2017 was small sized packs targetted at 'on the go' consumption.

Nectars, despite only a marginal price increase, saw a further marked decline in 2017; like juice impacted by consumer migration to categories perceived to be less sugary and healthier. Lack of producer activity in the nectars category is also serving to curtail consumer uptake; producers are looking to still drinks to obtain value gains. Within the category small sized packs aimed at the children's market, however, maintained volumes.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	40	38	37	34	32	-6.3%
Top two brands						2017 Vol ml
Juice	Cido					4.0
	Elmenhorster					1.6
Nectars	Elmenhorster					4.3
	Cido					4.0

Fruit juice (100% juice content)

Total fruit juice	14	14	14	14	13	-2.6%
Branded	12	13	12	11	11	-2.3%
Private label	2	2	2	2	2	-4.0%
Ambient	14	14	14	14	13	-2.6%
Chilled	0	0	0	0	0	102.0%
From concentrate	14	14	14	13	13	-2.6%
Not from concentrate	0	0	1	0	0	-2.0%

Nectars (25-99% juice content)

Total nectars	26	24	22	21	19	-8.7%
Branded	23	21	20	18	16	-9.4%
Private label	3	3	3	3	3	-4.7%

Luxembourg

Population: **0.6 million**

Fruit juice consumption trends in Luxembourg tend to be similar to those in Belgium. Consumers generally do not differentiate between fruit juice and nectars; a habit which is compounded by the products being positioned alongside each other in retail. Product price tends to be the key influencer behind the purchase decision. As in Belgium, the pursuit of healthier lifestyles and perception of juice as a high sugar beverage is proving a challenge for the fruit juice producers. More investment in marketing and promotion is needed to raise the profile of the chilled and not from concentrate segments.

Whilst **nectars** recorded a positive performance in 2017, progress continues to be hampered by a lack of consumer education and producer marketing.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	11	10	10	9	9	-0.8%

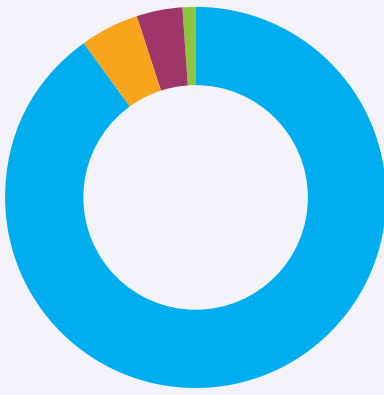
Fruit juice (100% juice content)

Total fruit juice	9	9	8	7	7	-1.1%
Branded	4	4	4	3	3	-1.5%
Private label	5	5	4	4	4	-0.8%
Ambient	8	7	7	6	6	-2.7%
Chilled	1	1	1	1	1	7.6%
From concentrate	5	5	4	4	4	-2.5%
Not from concentrate	4	4	4	4	4	2.3%

Nectars (25-99% juice content)

Total nectars	2	2	2	2	2	0.7%
Branded	1	1	1	1	1	1.6%
Private label	1	1	1	1	1	-0.3%

Fruit juice and nectars by packaging



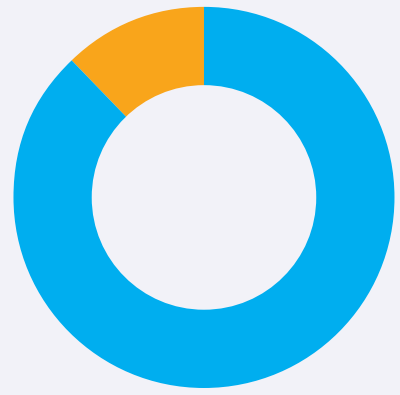
■ Carton 90.1% ■ Glass 4.3%
 ■ Plastic 4.5% ■ Other 1.0%

Fruit juice and nectars by flavours



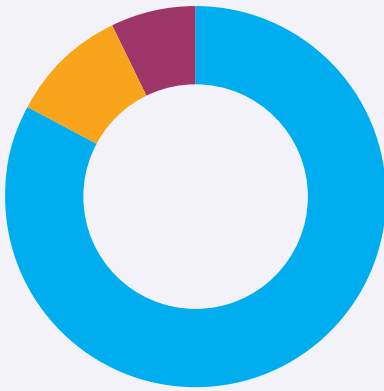
■ Apple 22.2% ■ Grape 9.3%
 ■ Orange 18.5% ■ Flavor Mixes 7.7%
 ■ Tomato 13.7% ■ Other 28.6%

Fruit juice and nectars by channel



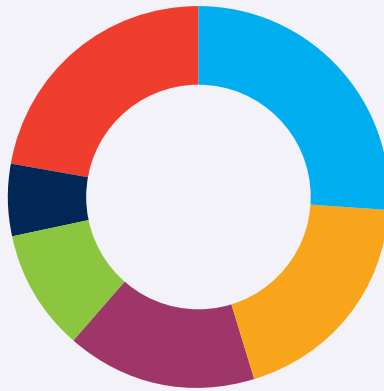
■ Take Home 87.9%
 ■ On premise 12.1%

Fruit juice and nectars by packaging



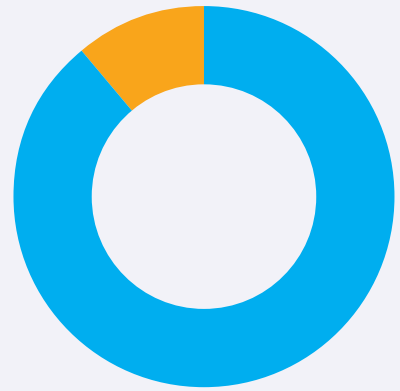
■ Carton 82.8% ■ Plastic 6.6%
 ■ Glass 10.6%

Fruit juice and nectars by flavours



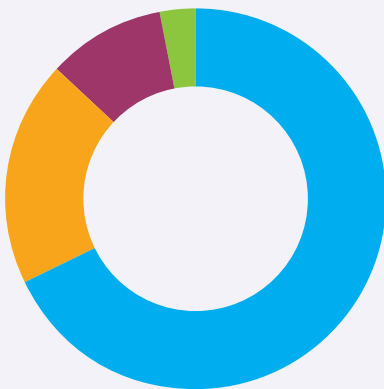
■ Orange 26.2% ■ Apple 10.3%
 ■ Flavor Mixes 19.3% ■ Vegetable 5.6%
 ■ Tomato 16.0% ■ Other 22.6%

Fruit juice and nectars by channel



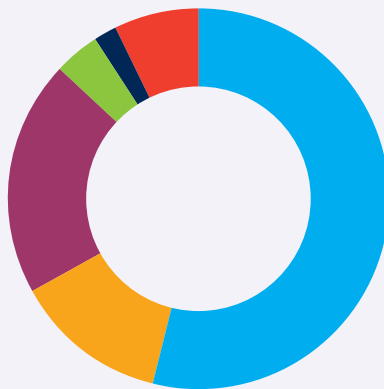
■ Take Home 89.6%
 ■ On premise 10.4%

Fruit juice and nectars by packaging



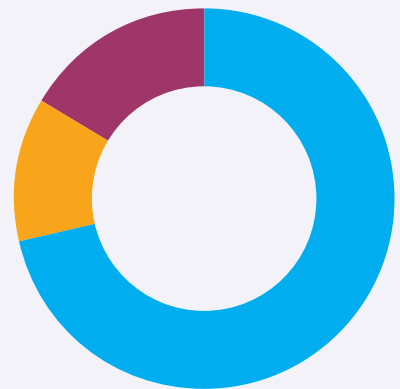
■ Carton 68.1% ■ Glass 9.9%
 ■ Plastic 19.6% ■ Other 2.3%

Fruit juice and nectars by flavours



■ Orange 54.7% ■ Grapefruit 3.6%
 ■ Apple 12.9% ■ Grape 1.7%
 ■ Blends 20.0% ■ Others 7.1%

Fruit juice and nectars by channel



■ Take-Home 70.7%
 ■ Impulse 12.6%
 ■ On Premise 16.6%

Malta

Population: **0.4 million**

Fruit juice was hard hit by the increasing health and wellness trends, undermined by its image as a beverage that is high in sugar, despite having no artificial qualities. Orange remained the dominant flavour, reflecting the conservative nature of the Maltese consumer when it comes to fruit juice. Both fruit juice and nectars are heavily reliant on imports. PET packaging is making inroads in response to consumer preference for transparent packs which allow them to view the fruit juice before purchase.

Nectars too contracted due to the growing health trends, as well as a lack of local production. Nectars also suffered from the banning of soft drinks in schools in response to childhood obesity concerns. Orange flavour retained a strong traditional lead, acting as a more affordable alternative to pure orange juice.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	12	13	13	13	12	-1.2%
Top two brands						2017 Vol ml
Juice	Pfanner					1.1
	Lidl (PL)					0.5
Nectars	Lidl (PL)					0.9
	Bravo					0.6

Fruit juice (100% juice content)

Total fruit juice	6	6	6	6	5	-1.8%
Branded	5	5	5	5	5	-2.3%
Private label	0	0	1	1	1	2.7%
Ambient	5	5	5	5	5	-2.0%
Chilled	0	0	0	0	0	0.9%
From concentrate	5	5	5	5	5	-2.0%
Not from concentrate	0	0	0	0	0	1.02%

Nectars (25-99% juice content)

Total nectars	7	7	7	7	7	-0.7%
Branded	6	6	6	6	6	-1.1%
Private label	1	1	1	1	1	2.0%

Norway

Population: **5.3 million**

In 2017 the **fruit juice** market saw an increasing trend to consumers upgrading to better quality product, but purchasing less of it. As a consequence market value was down by less than volume. Smoothies, however, were a very positive story, with sales in supermarkets up by nearly a quarter on 2016. Freshly squeezed products were flat – it seems consumers migrated to the smoothies segment. There remain considerable opportunities at the premium end of the fruit juice market, and with the category outside the rise in the soft drinks tax, volume losses are likely to be less pronounced in 2018.

Nectars are declining year on year and are heavily skewed to low cost ambient products. The soft drinks tax is expected to further erode demand in 2018.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	150	146	142	136	132	-3.3%
Top two brands						2017 Vol ml
Juice	Sunniva					35.4
	Coop (PL)					18.4
Nectars	Eldorado (PL)					1.6
	Coop (PL)					1.0

Fruit juice (100% juice content)

Total fruit juice	138	135	131	126	122	-3.4%
Branded	67	69	68	63	59	-5.8%
Private label	71	66	64	63	62	-1.0%
Ambient	72	64	60	58	56	-3.3%
Chilled	66	71	71	68	66	-3.5%
From concentrate	108	97	95	90	86	-5.0%
Not from concentrate	30	38	36	36	36	0.5%

Nectars (25-99% juice content)

Total nectars	12	11	11	10	10	-1.9%
Branded	4	4	3	4	3	-5.4%
Private label	8	8	7	7	7	0.0%

Portugal

Population: **10.3 million**

Fruit juice registered strong growth in 2017 fuelled by the health halo that the category enjoys. The fact that fruit juice is excluded from the soft drinks tax has also benefitted the category. Private label continues to drive the fruit juice market, accounting for nearly 53% of consumption. Growth, however, is expected to decelerate in 2018 as less innovation is being seen in private label. Offering vegetable and functional variants has the potential to attract younger consumers to the category.

Nectars also reaped the benefit of falling outside the scope of the soft drinks tax. The key trend within the category is the growth in low calorie variants at the expense of regular. Price point remains important in capturing volumes from the fruit juice category.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	114	114	119	125	131	4.8%
Top two brands						2017 Vol ml
Juice	Compal					4.9
	Um Bongo					1.1
Nectars	Compal					68.0
	Um Bongo					10.1

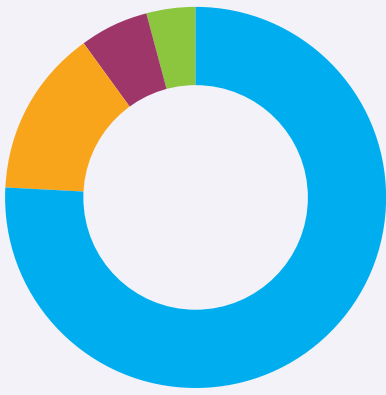
Fruit juice (100% juice content)

Total fruit juice	20	19	16	15	19	22.9%
Branded	8	8	8	8	9	6.5%
Private label	12	12	9	7	10	43.4%
Ambient	18	18	14	13	16	22.7%
Chilled	2	2	2	2	2	23.9%
From concentrate	18	18	14	13	16	22.7%
Not from concentrate	2	2	2	2	2	23.9%

Nectars (25-99% juice content)

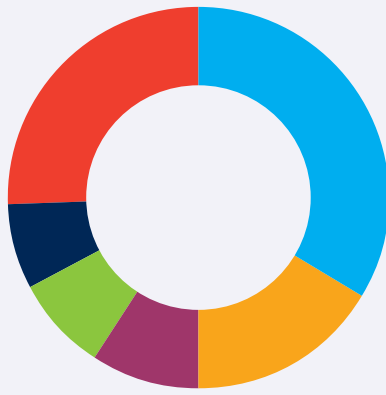
Total nectars	93	95	103	110	112	2.6%
Branded	66	69	78	84	85	0.9%
Private label	28	26	25	26	28	8.1%

Fruit juice and nectars by packaging



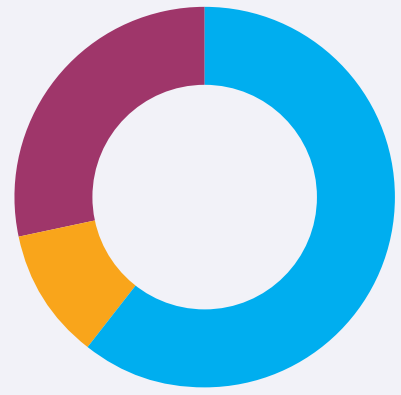
Carton 76.3%
Plastic 14.2%
Glass 5.8%
Other 3.8%

Fruit juice and nectars by flavours



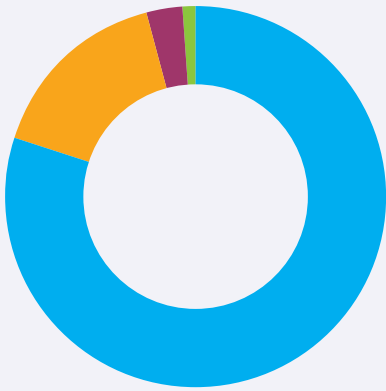
Orange 33.3%
Apple 16.2%
Flavour Mixes 9.5%
Others 25.9%
Pineapple 8.1%
Pear 6.9%

Fruit juice and nectars by channel



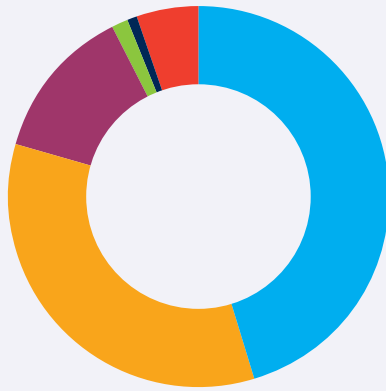
Take Home 60.2%
On Premise 28.5%
Impulse 11.3%

Fruit juice and nectars by packaging



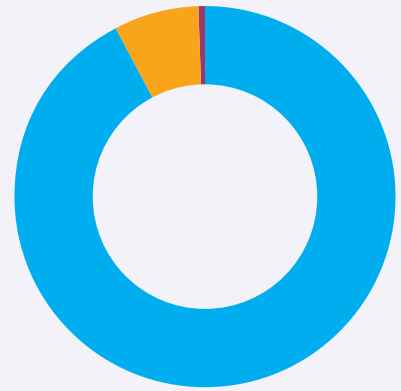
Carton 80.3%
Plastic 16.2%
Other 2.9%
Glass 0.7%

Fruit juice and nectars by flavours



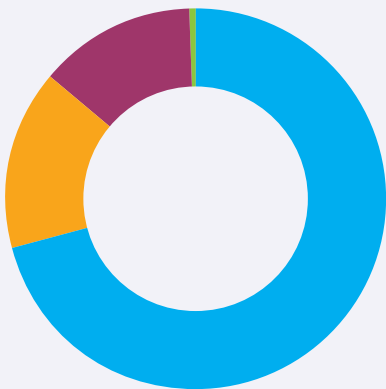
Orange 45.3%
Apple 34.4%
Flavor Mixes 13.3%
Other 5.0%
Pineapple 1.3%
Pomegranate 0.7%

Fruit juice and nectars by channel



Take Home 92.3%
On premise 7.4%
Impulse 0.2%

Fruit juice and nectars by packaging



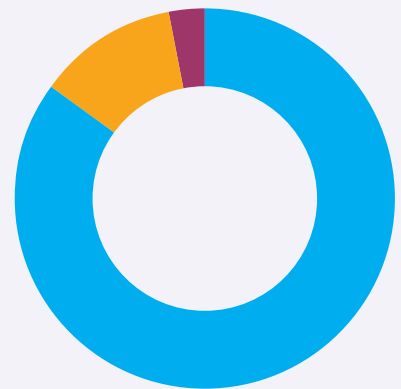
Carton 70.5%
Plastic 15.6%
Glass 13.7%
Other 0.3%

Fruit juice and nectars by flavours



Peach 17.4%
Orange 17.0%
Flavor Mixes 15.1%
Other 25.0%
Mango 14.7%
Apple 10.8%

Fruit juice and nectars by channel



Take Home 85.1%
On premise 12.0%
Impulse 2.9%



Rep. of Ireland

Population: **4.8 million**

Fruit juice declined again in 2017, undermined by negative consumer perceptions regarding high sugar content in juice and migration to categories such as packaged water and flavoured water. The chilled juice segment, however, bucked the trend with private label strongly outperforming brands due to their affordability. The share of chilled juice has risen by ten percentage points since 2014 to 56%, but this is mainly due to the contraction in ambient volumes.

The media debate and attention given to sugar in drinks also had a negative impact on **nectars**. The category is expected to continue to decline as consumers move to perceived healthier beverages. Nectars producers need to make concerted efforts to distinguish and establish the category's identity to prevent volume loss to similar categories such as fruit juice.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	50	45	41	38	37	-2.0%
Top two brands						2017 Vol ml
Juice	Tropicana					6.9
	Innocent					4.5
Nectars	Ocean Spray					2.3
	Sqeez					0.6

Fruit juice (100% juice content)

Total fruit juice	44	39	36	33	32	-2.1%
Branded	26	21	23	21	19	-6.5%
Private label	19	18	13	12	13	5.1%
Ambient	25	21	16	15	14	-7.6%
Chilled	20	18	20	18	18	2.7%
From concentrate	31	27	20	18	18	-1.6%
Not from concentrate	13	12	15	15	14	-2.7%

Nectars (25-99% juice content)

Total nectars	6	6	6	5	5	-1.7%
Branded	5	5	5	5	4	-4.1%
Private label	1	1	0	1	1	16.7%



Romania

Population: **19.6 million**

There is not a strong tradition of consuming **fruit juice** and nectars in Romania - most consumers do not consider drinking fruit juice is a replacement for fresh fruit in their diets. Growth in the fruit juice market is being driven by premiumisation, and specifically by not from concentrate and chilled variants. Increased disposable income level is encouraging consumer up-trading. Super premium chilled not from concentrate mixed fruit/vegetable juices offering additional functional benefits are an emerging trend.

Nectars growth picked up in 2017, but faster progress remains hampered by a lack of producer investment in innovation. Flavour diversity across all price bands - brands and private label - plays a key role in driving sales. Nectars presence in on-premise is limited, with the concept squeezed between premium fruit juice and lower cost still drinks.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	54	54	58	61	64	4.8%
Top two brands						2017 Vol ml
Juice	Santal					2.7
	Tymbark					2.4
Nectars	Tedi					6.7
	Santal					4.7

Fruit juice (100% juice content)

Total fruit juice	21	20	22	24	25	6.2%
Branded	15	15	16	16	18	9.3%
Private label	6	5	6	7	7	-1.0%
Ambient	21	20	21	22	23	4.4%
Chilled	0	0	0	1	2	43.4%
From concentrate	19	18	19	19	19	-1.8%
Not from concentrate	1	2	3	4	6	40.2%

Nectars (25-99% juice content)

Total nectars	33	34	36	37	39	3.9%
Branded	26	26	28	29	31	6.4%
Private label	7	8	8	8	8	-5.2%



Slovak Republic

Population: **5.4 million**

Fruit juice recorded another buoyant performance in 2017. Growth was supported by the introduction of new players and brand extensions, and growing demand for fresh juice and beverages containing pulp. Premium mixed fruit/vegetable variants increased penetration, and further new product development featuring for example added vitamins, new fruit/vegetable combinations and/or inclusion of fruit pieces can be expected. Single-serve PET packs (20cl, 25cl and 33cl) grew in popularity for "on the go" consumption.

Increasing consumer demand for healthy branded fruit-based drinks, and growing purchasing power is driving **nectars** growth. Heavy discounting activity in the run up to Christmas also contributed strongly in 2017. As in fruit juice, small sized packaging was boosted by the increasing trend to consumption "on the go".

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	34	38	40	43	45	5.5%
Top two brands						2017 Vol ml
Juice	Relax					4.4
	Happy Day					3.7
Nectars	Relax					4.7
	Cappy					3.0

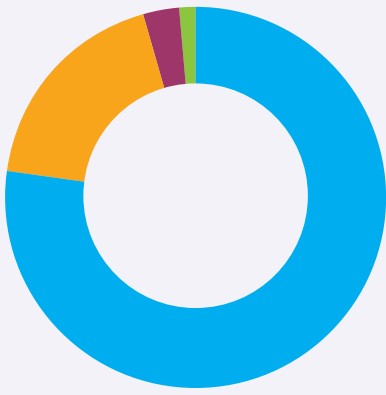
Fruit juice (100% juice content)

Total fruit juice	19	22	24	26	27	6.3%
Branded	12	15	16	17	19	9.6%
Private label	7	8	9	9	9	-0.2%
Ambient	18	20	22	23	25	6.5%
Chilled	1	2	2	2	3	4.6%
From concentrate	18	20	22	23	25	6.5%
Not from concentrate	1	2	2	2	3	4.6%

Nectars (25-99% juice content)

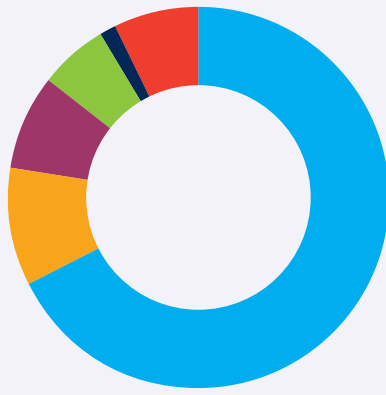
Total nectars	15	15	16	17	17	4.3%
Branded	11	11	12	13	14	9.0%
Private label	5	4	4	4	3	-12.8%

Fruit juice and nectars by packaging



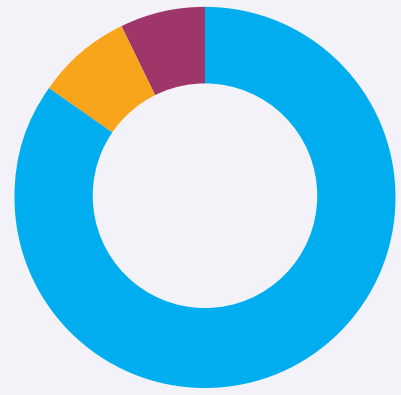
■ Carton 76.9% ■ Glass 3.2%
■ Plastic 18.7% ■ Other 1.2%

Fruit juice and nectars by flavours



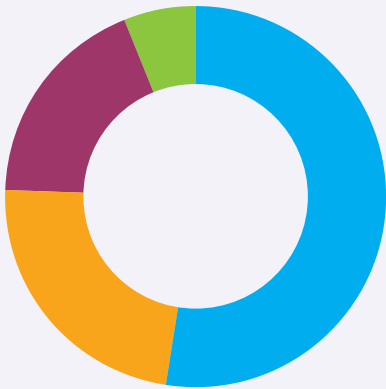
■ Orange 68.1% ■ Flavor Mixes 5.7%
■ Apple 10.1% ■ Mango 1.5%
■ Berries 7.9% ■ Other 6.8%

Fruit juice and nectars by channel



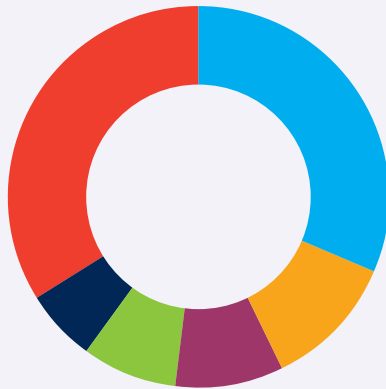
■ Take Home 84.9%
■ Impulse 7.9%
■ On premise 7.2%

Fruit juice and nectars by packaging



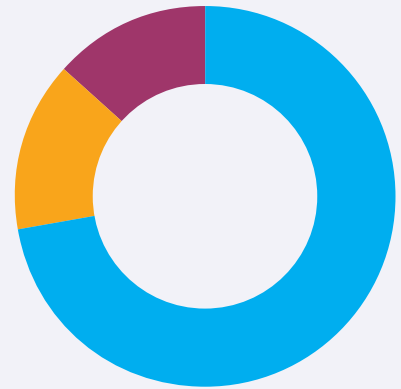
■ Carton 52.6% ■ Plastic 18.0%
■ Glass 23.2% ■ Other 6.2%

Fruit juice and nectars by flavours



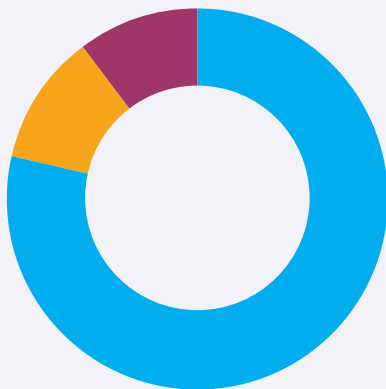
■ Orange 31.4% ■ Peach 8.7%
■ Apple 11.3% ■ Vegetable 5.9%
■ Flavor Mixes 9.2% ■ Other 33.4%

Fruit juice and nectars by channel



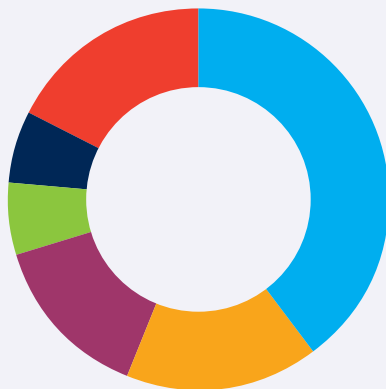
■ Take Home 71.8%
■ Impulse 14.9%
■ On premise 13.4%

Fruit juice and nectars by packaging



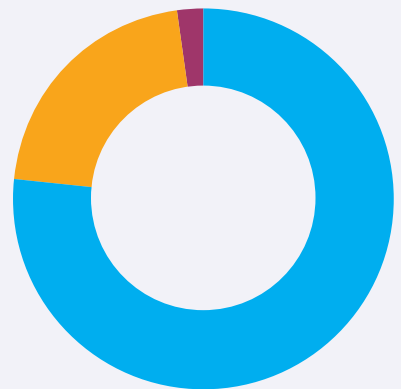
■ Carton 78.2%
■ Glass 11.4%
■ Plastic 10.4%

Fruit juice and nectars by flavours



■ Orange 39.5% ■ Grapefruit 6.5%
■ Apple 16.1% ■ Berries 6.3%
■ Flavor Mixes 14.6% ■ Other 16.9%

Fruit juice and nectars by channel



■ Take Home 76.5%
■ On premise 21.4%
■ Impulse 2.1%

Slovenia

Population: **2.1 million**

Fruit juice remained around the 12-13 million litres mark, but growth momentum picked up again in 2017. Towards the end of the year there was a notable trend to local fruit juice produced by farmers in glass bottles. These premium offerings were listed by retailers such as Mercator. Growing consumer confidence supported the trend. Increased consumer spending power and growing demand for natural, high quality products is forecast to drive growth in 2018. Recently introduced organic products are expected to reinforce the category's image. Smoothies remain a niche segment with few players as yet.

Nectars remains hampered by low popularity, and a lack of innovation and investment by producers. The category is also vulnerable to increased consumer sensitivity regarding sugar content.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	33	30	29	27	27	-1.8%
Top two brands						2017 Vol ml
Juice	Fructal					2.4
	Happy Day					1.0
Nectars	Fructal					5.0
	Dana					1.4

Fruit juice (100% juice content)

Total fruit juice	13	12	13	12	13	3.3%
Branded	5	5	6	6	6	8.0%
Private label	8	7	7	6	6	-0.9%
Ambient	13	12	13	12	13	3.3%
From concentrate	13	12	13	12	13	3.3%

Nectars (25-99% juice content)

Total nectars	20	17	16	15	14	-6.0%
Branded	11	10	10	9	9	-5.1%
Private label	8	7	7	6	5	-7.3%

Switzerland

Population: **8.5 million**

Overall **fruit juice** saw another year of decline due to the highlighting in the government's drive against obesity of the high sugar content in juice, and consumer migration to categories such as flavoured water. Within the category, the market shift continued with volumes moving out of ambient and into the still niche chilled segment due to its healthier image. Not from concentrate juice also bucked the trend, with the branded segment providing the major impetus as consumers seem to prefer the heritage of a brand when they are paying higher prices.

Nectars was subject to the same influences as fruit juice. The blurring of the boundaries between fruit juice and nectars is enhanced by the fact that the leading brands and private labels operate across both categories.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	196	194	192	187	184	-1.4%
Top two brands						2017 Vol ml
Juice	Migros (PL)					32.6
	Ramseier					26.4
Nectars	Migros (PL)					13.4
	Coop (PL)					5.6

Fruit juice (100% juice content)

Total fruit juice	150	148	146	142	140	-1.7%
Branded	72	70	71	71	71	0.2%
Private label	78	77	76	71	69	-3.6%
Ambient	133	130	128	124	120	-3.1%
Chilled	17	17	18	19	20	8.1%
From concentrate	131	129	126	122	118	-3.2%
Not from concentrate	19	19	20	21	22	7.2%

Nectars (25-99% juice content)

Total nectars	46	46	46	45	44	-0.4%
Branded	14	14	17	17	18	1.7%
Private label	32	32	29	27	27	-1.8%

Turkey

Population: **79.4 million**

Whilst generally consumer awareness of the difference between fruit juice and nectars is still low, **fruit juice** has benefitted from the regulation, introduced in 2016, prohibiting the sale of nectars in schools. Since the introduction of the legislation many producers of nectars have shifted production to fruit juice in order to maintain their presence in educational establishments. Growing health and wellness trends are expected to help sustain growth in 2018.

Following the sharp decline in consumption in 2016 caused by the introduction of the legislation banning **nectars** in schools, the category registered only a marginal drop in 2017. Nectars also suffer from price competition from lower cost still drinks. However, with the new private consumption tax being enforced on still drinks as well from 2018, price strategy will become increasingly important for nectars.

Total fruit juice and nectars						
Volume, million litres	2013	2014	2015	2016	2017	16-17Gr%
Total	658	705	690	680	679	-0.1%
Top two brands						2017 Vol ml
Juice	Cappy					25.6
	Dimes					9.0
Nectars	Cappy					141.6
	Dimes					84.3

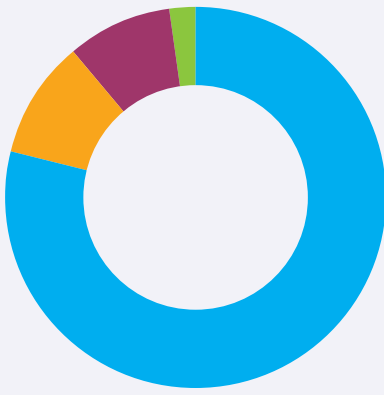
Fruit juice (100% juice content)

Total fruit juice	51	52	52	62	63	1.9%
Branded	46	48	47	57	57	0.8%
Private label	4	5	5	5	6	14.5%
Ambient	46	47	46	56	57	3.0%
Chilled	5	5	6	6	5	-8.3%
From concentrate	42	43	41	50	51	3.0%
Not from concentrate	9	10	11	12	11	-2.9%

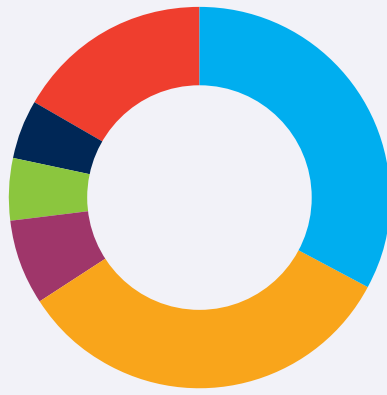
Nectars (25-99% juice content)

Total nectars	607	652	638	618	616	-0.3%
Branded	528	570	553	526	519	-1.4%
Private label	79	82	85	92	97	6.2%

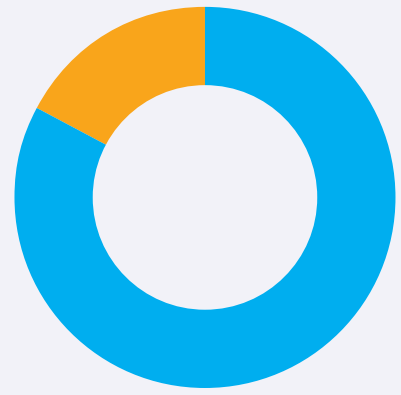
Fruit juice and nectars by packaging



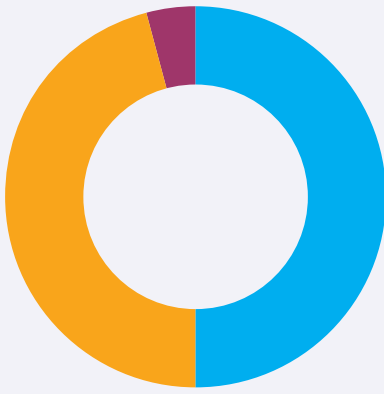
Fruit juice and nectars by flavours



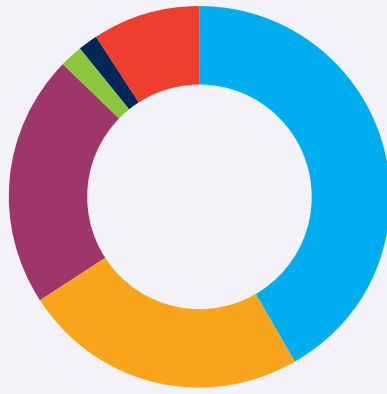
Fruit juice and nectars by channel



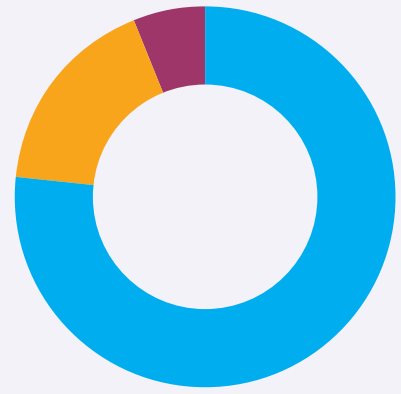
Fruit juice and nectars by packaging



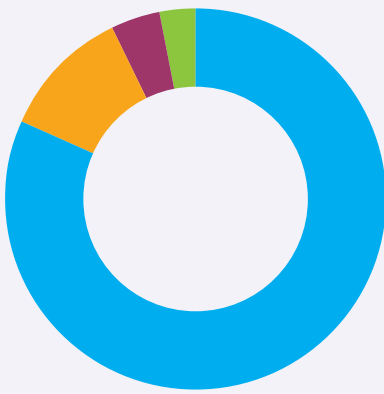
Fruit juice and nectars by flavours



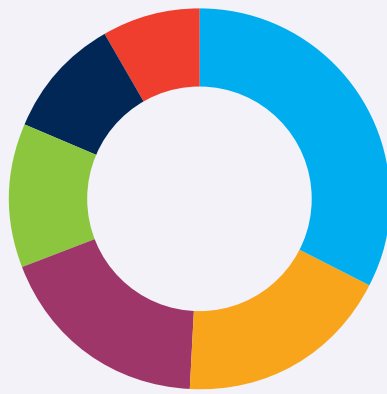
Fruit juice and nectars by channel



Fruit juice and nectars by packaging



Fruit juice and nectars by flavours



Fruit juice and nectars by channel



AIJN Report Methodology

Within the beverage industry GlobalData is recognised as the beverage information specialist and has been commissioned to produce the 2018 AIJN European Fruit Juice Market Report.

All data and analysis in the report have been produced using GlobalData's in-depth Wisdom Market Analyzer database and our latest Annual Soft Drinks Market Insight and Quarterly Beverage Forecast analysis reports.

The key to our methodology is that we operate in partnership both with manufacturers and their suppliers, allowing our in-country experts to cross-examine and reconcile consumption volumes through the value chain.

GlobalData's research is built from brand data upward. This 'brick-by-brick' approach, as well as the cross-fertilisation with other related services, ensures that our research has an internal logic, which cross-

checks from all angles – from brand volume through to corporate volume, flavour segmentation, packaging splits and on- and off-premise channel distribution.

During GlobalData's annual and quarterly research cycles, leading producers in the fruit juice and allied industries are regularly contacted by our dedicated in-country researchers. This on-going dialogue and regular market observation ensures that our researchers are best placed to provide insightful value-added analysis of the fruit juice and nectars industry worldwide.

All forecasts are compiled by GlobalData using cross-correlation regression and Bayesian techniques to ensure rigour and accuracy.

Acknowledgements

GlobalData would like to thank the AIJN and the European fruit juice and nectars industry for its help and support during the research process.

Definitions

Fruit juice and nectars

Fruit juice: 100% pure fruit juice or vegetable juice with no added ingredients, except permitted minerals and vitamins for the purpose of fortification and permitted additives. Includes products: from concentrate, not from concentrate, chilled, ambient, frozen concentrated fruit juice, smoothies. Excludes carbonated juice.

Nectars: 25-99% juice content. Diluted fruit/vegetable juice and pulp, to which sweetening agents (e.g. sugar, honey, syrups and/or sweeteners) can be added for the purposes of production. Permitted minerals and vitamins for the purpose of fortification and permitted additives may be added. Depending on the fruits used the minimum juice and/or puree content required for nectars goes from a minimum of 25% by volume of finished product up to 50%. Includes products: from concentrate, not from concentrate, chilled, ambient and smoothies.

Smoothies: Comprise blended fruit purée and juice drinks with a thick, smooth texture, sometimes incorporating a dairy element (yogurt) and/or functional elements (e.g. aloe vera, ginkgo, ginseng).

Both chilled and ambient products can be found. Categorized under the fruit juice and nectars categories, depending on juice content and/or ingredients. Includes smoothies containing less than 50% dairy only.

Enhanced/enriched juice: Fruit juice or nectars enriched for general or specific health benefits, with ingredients (e.g. vitamins, minerals, fibre, supplements such as co-enzyme Q10, etc) which have been isolated and added for that purpose in order to obtain a price premium.

Not from concentrate (NFC): The fruit/vegetable is squeezed in the country of origin, lightly pasteurised and frozen or aseptically packed for shipment to where it will be sold.

From concentrate (FC): The fruit/vegetable is squeezed and concentrated through evaporation of natural water content by evaporators, before being frozen and shipped to the country for use and packaging. The product is then reconstituted to its original strength by addition of the same amount of water.

Freshly squeezed juice: Freshly squeezed fruit, not pasteurised, chilled with a shelf-life of a few days.

Cold pressed/HPP: The process of 'cold pressing' refers to the extraction of juice, initially by crushing and then pressing or grinding the fruit/vegetables without the use of heat in order to retain the highest level of vitamins, minerals and nutrients. The juices are then packed, or blended and packed.

High Pressure Processing (HPP): is a post-packaging process. It uses high pressure to destroy pathogens that can cause spoilage instead of heat, thereby

preserving heat-sensitive vitamins, enzymes and nutrients, resulting in a fresher end taste experience and a product with an extended shelf-life of up to 30 days.

Chilled juice: Relates to products that are distributed and sold via the chilled distribution chain. These products will be marketed and positioned as chilled products and will usually be perceived by consumers as requiring chilling (although this may or may not be technically necessary).

Ambient juice: Relates to products that are distributed and marketed via an ambient distribution chain. Note, these products may be placed in chillers at the point of sale, e.g. in convenience stores because consumers prefer to purchase a chilled beverage, but would not usually be perceived as needing to be chilled.

Flavour mixes: No single flavour is perceived to be dominant e.g. tropical mixes, red fruits, summer fruits, cocktail mix, multi-fruits.

Still drinks: Flavoured ready to drink, non-carbonated products, which may be fruit or non-fruit flavoured and have a juice content of 0.0-24.9%. Sugar, artificial flavouring and colouring may be added.

Industry Terms

Take home / Off-premise: Volume sold for 'subsequent consumption' away from the place of purchase, comprising: modern retail (e.g. supermarkets, hypermarkets, hard discount stores), traditional retail; specialist beverage retailers; home delivery; e-commerce.

Impulse: Convenience stores such as 7-11; petrol/gas station outlets; small food stores with long opening hours; kiosks; vending.

On-premise: Volume sold for 'immediate consumption' at the place of purchase, comprising: QSR - Quick Service Restaurants; EDA Places - Eating, Drinking & Accommodation; Institutions; Other On-premise e.g. cinemas, street stalls and kiosks, travel and transport, leisure (including gyms/health clubs etc) and events.

Horeca: Hotels, restaurants and catering outlets.

FJN: Fruit juice and nectars

Plastic: Refers to PET (polyethylene terephthalate); HDPE (high-density polyethylene) and polypropylene (PP) packaging.

Notes: Totals may not add due to rounding.

Blank/0.0 denotes data not available or volume less than 0.05 million litres or zero.

E = estimate

Credits: Data: GlobalData

Designed and printed in the UK by GlobalData using sustainable forest paper.

About AIJN

AIJN is the representative association of the fruit juice industry in the EU. It represents the industry from the fruit processors to the packers of the consumer products. AIJN's foundation goes back to 1958. The AIJN office is situated in the heart of the Brussels European quarter.

Key AIJN Aims and Objectives

1. **Represent** the interests and promote the image of the European fruit juice industry in all its contact with EU Institutions and other relevant organisations and stakeholders;
2. **Support and lobby** European Union Institutions on all aspects of policy and legislation affecting the production, marketing, sales and trade in fruit juices and nectars in the EU;
3. **Defend and promote** fruit juices as nutritious products that are an integral part of a healthy diet, through the AIJN Juice Campaign;
4. **Encourage and support**, fruit juice companies to integrate corporate social responsibility in all stages of their supply chain, through the Fruit Juice CSR Platform;
5. **Provide**, in collaboration with the European Quality Control System, mechanisms and instruments securing safe and authentic goods to maintain and increase consumer confidence in the good and healthy image of fruit and vegetable juices and nectars;
6. **Inform and advise** the fruit juice industry on all aspects of European legislation likely to affect their businesses;
7. **Liaise** with national, regional and worldwide interests representing the fruit juice industry to foster and achieve overall AIJN objectives.

Membership

The AIJN membership is composed of national fruit juice associations from 17 EU Member States and from two countries that applied for EU membership. For more information on membership benefits, please visit www.aijn.org

AIJN Executive Board

President, José Jordão, Strategic Director, Sumol+Compal SA, Portugal;
1st Vice-President, Wolfgang Schwald, General Manager Fruit, Processing and Sales, Rauch Fruchtsäfte GmbH & Co OG, Austria;
2nd Vice-President, Bruno Van Gompel, Technical Director, Coca-Cola Western Europe, Belgium

Members:

Thomas Mertens, Managing Director Supply Chain, Wesergold Getränkeindustrie GmbH & Co. KG, Germany; Piotr Podoba, CEO, Döhler Sp. z o.o., Poland; Helmuth Brandstaetter, CEO Zipperle AG, Italy; Douglas Lamont, Chief Executive Officer, Innocent drinks, United Kingdom; Emmanuel Manichon, General Manager, Eckes-Granini, France; Javier Lorenzo, Eckes-Granini Ibérica, Spain; Peter Mulrine, Chairman, Mulrines, Ireland; Juan Ignacio Amat, General Manager, PepsiCo, Switzerland

National Associations - Full and Affiliated Members of AIJN

Austria: Verband der Österreichischen Fruchtsaft und Fruchtsirupindustrie
Belgium: Association Belge des Fabricants, Embouteilleurs et Importateurs de Jus de Fruits (AJUNEC)
Bulgaria: Bulgarian Soft Drinks Association (BSDA)
Cyprus: KEAN SOFT DRINKS LTD (KEAN)
Denmark: Danish Fruit Juice and Jam Industries
Finland: Juice and Preserves Industries' Association
France: Union Nationale des Producteurs de Jus de Fruits (UNIJUS)
Germany: Verband der Deutschen Fruchtsaft-Industrie e.V. (VDF)
Greece: Biofresh SA
Ireland: Irish Beverage Council
Italy: A.I.I.P.A., Conserve Italia Scarl, Federvini
Netherlands: FWS
Poland: Polish Association of Juice Producers (KUPS)
Portugal: Sumol + Compal SA
Spain: Asociación Española de Fabricantes de Zumos (ASOZUMOS)
Sweden: Swedish Juice Association
UK: British Soft Drinks Association Ltd (BSDA)
Serbia: Serbian Fruit Juice Producers Association (SFJPA)
Turkey: Turkish Fruit Juice Industry Association (MEYED)

In addition, there is a long list of **Observer members** that are national associations from non-European countries, individual companies who are suppliers of raw materials, packaging materials, equipment, ingredients or processing aids to the EU fruit and vegetable juices industry and/or to associations representing these suppliers.





AIJN
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