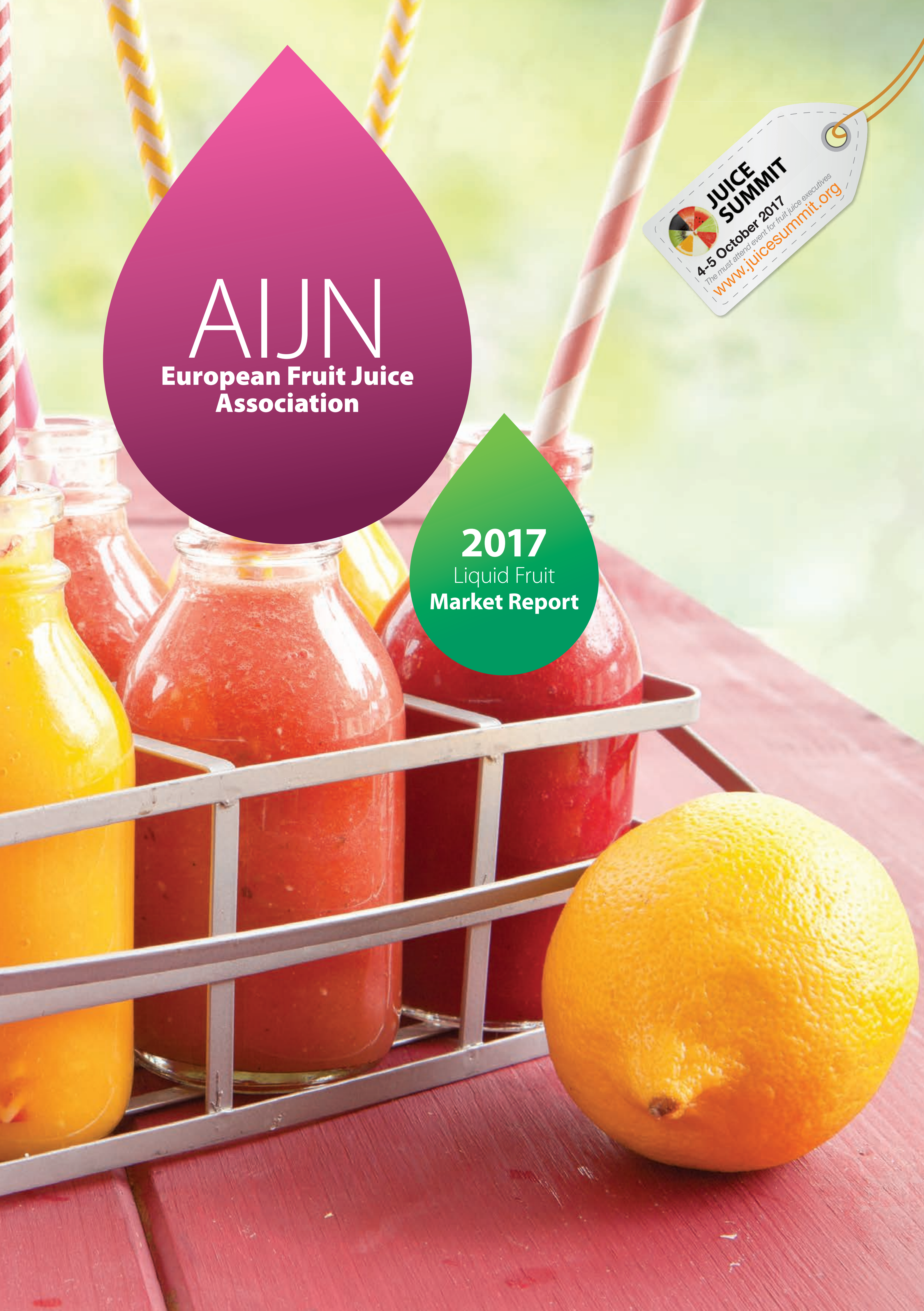

AIJN

European Fruit Juice Association

2017

Liquid Fruit

Market Report

FRUIT JUICE MATTERS

Introducing the

Fruit Juice Matters 2017 Report

Highlighting FJM's activity and progress in 2016
Download it from the FJM website fruitjuicematters.eu

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Introduction from the President

Welcome to the 2017 edition of the European Fruit Juice Association (AIJN) Market Report. The aim is to provide the European and national legislators, non-governmental organisations and fellow stakeholders in the food and drinks industry with a global and in-depth overview of the juice market.

As the new President of the AIJN, I would like to take this opportunity to express my gratitude to the national associations for trusting me to lead the European Fruit Juice Association. Your collaboration will be indispensable for helping us, my fellow Board members and I, in taking AIJN to the next level in forward thinking and enhancing its management capabilities.

For those of you who do not know me yet, I am from Portugal and currently hold the position of Strategic Director and Board Member of SUMOL+COMPAL's holding company. Since I joined the group in 1992, I have worked in various positions in marketing and sales both domestic and international. I hold a degree in Economics and a Bachelor of Business Administration from ISE and ISCTE University of Lisbon.

Last year was a very fruitful and active year for AIJN, covering the Juice CSR Platform, the Code of Practice and especially focusing strongly on the Fruit Juice Matters Programme (formerly known as the AIJN Juice Campaign). In this respect, I would like to thank the former president of the AIJN, Marjan Skotnicki-Hoogland, for her significant contribution provided to our association and to the juice industry. This is not a goodbye, as Marjan will stay on in the AIJN Board as 2nd Vice President.

The Fruit Juice Matters Programme continues to be at the forefront of this industry's communication strategy. The year 2016 was an important start in rebalancing a very one-sided conversation and in finding again an indispensable path of sustainable growth. The programme continues to be a voluntary funding effort coming from the European Bottling Juice industry along with CitrusBR members and other contributors from the packaging industry. Currently we are taking this joint endeavour one step further in emphasising the role of science in our industry. Given the strict regulatory compliance stemming from the Nutrition and Health Claims Regulation, the FJM programme needs to invest in researching and releasing scientific based evidence for better supporting the messages for its key stakeholders. The Scientific Expert Panel (SEP), a group of independent professors whose scientific reputation in food and nutrition is outstanding and highly recognized in the world, has been helping the FJM Programme to be effective in sharing the science and celebrating the benefits of juices.

José Jordão, AIJN President

"The Fruit Juice Matters Programme continues to be at the forefront of this industry's communication strategy"

Two important pillars of the AIJN remain the Code of Practice and the Juice CSR Platform. The AIJN Code of Practice is a crucial tool for the industry and is now the worldwide reference guide for authenticity and quality of fruit and vegetable juices. In total, the Code of Practice includes 27 reference guidelines. The Juice CSR Platform aims to promote sustainability and integrate corporate social responsibility (CSR) in the core strategy of the business. More information on the Juice CSR Platform is provided within this report.

Aiming to provide a genuine and dynamic forum for all industry players and their worldwide suppliers, the Juice Summit, an event started in 2013, is now the leading annual global conference for fruit juice executives. Last year was once again acknowledged as a resoundingly successful event due to its record number of attendees.

This year we celebrate the 5th anniversary of the Juice Summit and AIJN, along with its partners IFU and SGF, is preparing a great event with high-profile speakers and fantastic venues. If you have not done so yet, please make sure to save the dates, 4 - 5 October (Antwerp, Belgium), in your calendars.

Have a great summer, and I look forward to welcoming you in Antwerp at the 2017 Juice Summit.

The Fruit Juice Industry: Overall Fruit Juice Consumption

Total Fruit Juices and Nectars in EU							
Year		**2012**	**2013**	**2014**	**2015**	**2016**	**15-16 Gr%**
Volume, million litres		**10,357**	**9,916**	**9,589**	**9,529**	**9,299**	**-2.4%**
Total	**Private label**	**5,032**	**4,870**	**4,782**	**4,784**	**4,730**	**-1.1%**
	Branded	**5,325**	**5,046**	**4,807**	**4,745**	**4,569**	**-3.7%**

Fruit juice (100% juice content)

Total fruit juice		6,748	6,442	6,175	6,109	6,008	-1.6%
	Private label	3,609	3,508	3,438	3,467	3,495	0.8%
	Branded	3,139	2,934	2,736	2,642	2,514	-4.9%
Chilled		1,386	1,396	1,380	1,408	1,476	4.8%
Ambient		5,362	5,046	4,795	4,701	4,533	-3.6%
From concentrate		4,945	4,593	4,311	4,163	3,958	-4.9%
Not from concentrate		1,803	1,849	1,864	1,946	2,050	5.4%

Nectars (25–99% juice content)

Total nectars		3,609	3,473	3,415	3,420	3,291	-3.8%
	Private label	1,424	1,362	1,344	1,317	1,235	-6.2%
	Branded	2,186	2,112	2,071	2,103	2,055	-2.3%

Largest EU FJN market by volume consumption, 2016

Country	Million litres
Germany	2,361
France	1,415
United Kingdom	1,116
Spain	831
Poland	800
Others	2,776
Total	9,299

Largest EU FJN market by per-capita consumption, 2016

Country	Population (million)	Litres per person
Malta	0.4	31.0
Germany	82.6	28.6
Netherlands	17.0	23.8
Cyprus	1.2	23.4
Austria	8.7	22.9
Sweden	10.0	22.5

Largest FJN markets by volume consumption by region, 2016

Region	Million litres
North America	8,943
West Europe	8,208
Asia Pacific	7,683
East Europe	4,250
Africa & Middle East	3,457
Latin America	3,422
Total	35,963
EU 28	9,299

Largest FJN markets by per-capita consumption by region, 2016

Country	Population (million)	Litres per person
North America	360.3	24.8
West Europe	420.5	19.5
EU 28	512.4	18.2
East Europe	393.5	10.8
Latin America	585.0	5.8
Africa & Middle East	952.2	3.6
Asia Pacific	3,697.5	2.1





Juices for Today and for Tomorrow – Assuring a Sustainable Future for the Sector

It has become evident by now - social and environmental sustainability is a growing concern for many consumers, in particular amongst the millennials. And this is valid for all products this population is exposed to, including food and beverage products. We could even say that our products are under a special spotlight as they are widely available and purchased on a daily basis. Many companies are therefore making efforts to improve their sustainability image.

Nevertheless, the consumer drive is not the only one: many businesses are driven by the idea of optimisation and continuous improvement which eventually lead towards profitability. Not to be neglected is motivation stemming from the sense of moral obligation to the environment and the society at large.

But the European juice sector is composed of companies of various sizes and levels of integration, which, combined with the complex global supply chains, makes a sector-wide approach a challenge. AIJN, however, took this challenge up back in 2013 by establishing the Juice CSR Platform - a sustainability initiative of the juice industry supported by the European Commission.

The objective of the Juice CSR Platform is to inspire and support the European juice industry to integrate Corporate Social Responsibility (CSR) in its business operations. The Platform aims to build a CSR network in the juice industry, to share information and good practices, and to initiate collaborative projects. This is where the true multi-stakeholder character of the Platform is shown through collaboration of representatives of primary producers, processors, bottlers, retailers, suppliers and even NGOs.

Core Juice CSR Platform activity, next to sharing good practice, takes place in specific country/crop working groups. There are currently 3 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, then seek solutions for improvements through collaborative projects.

How do we do this? By using documentation of group members, by carrying out interviews with relevant stakeholders, and by organising field trips or 'fact-finding missions', as we call them. The latter are crucial for getting access to concrete information 'on the ground' and understanding the real context of all issues and opportunities. It is only by reaching out to our fruit growers that we can comprehend their environment and provide them with support. The same goes with engagement with local authorities, research institutes, NGOs, and other stakeholders who can all play a part in setting up pilot projects around identified environmental, social and economic challenges.

Achieving meaningful improvements in sustainability - that is what we are striving for. Important progress has already been achieved, but further results can be gained by joining our efforts and resources and by putting greater emphasis on the effectiveness of a pre-competitive collaborative approach – the core value of the Juice CSR Platform!

AMC Juices Awarded by Sedex 2017 for active collaboration in the Juice CSR Platform

AMC Juices were awarded with the Sedex Award 2017 in the Best Collaborative Effort category for their active collaboration in the Juice CSR Platform. The Sedex Awards were created to celebrate sustainability success stories of Sedex members worldwide in areas of continuous improvement, best collaborative efforts, and innovative supply chain programmes. AMC are members of Sedex for over a decade, managing their Ethical Compliance audits through the Sedex Platform.

Olimpia Ortiz, Head of Quality Systems & Sustainability at AMC Juices commented: '*This is a great recognition of our joint work awarded by sustainability experts that have chosen our project between hundreds of others. We hope that having presented the Juice CSR Platform to the Sedex Awards will give exposure not only to our company, but to the Platform and its members, demonstrating that the juice sector is being proactive when it comes to sustainability.*'

Aiming for 100% sustainable juice

On the occasion of the Juice CSR Platform plenary meeting in March 2017, the IDH Covenant on Sustainably Sourced and Processed Fruit and Vegetable Derived Juices Purees and their Concentrates was launched. Under the coordination of IDH – The Sustainable Trade Initiative, the companies Döhler, FrieslandCampina Riedel, Refresco and Verbruggen Juice Trading Sustainable Products b.v., signed a global covenant targeting 100% verified sustainable sourcing for their juices within the next decade. With the support of AIJN, they will work on the certification/verification of their supply chains, and jointly set up projects to address specific sustainability issues such as smallholder inclusion, working conditions, soil erosion and degradation, and climate resilience. Other companies are welcome to join this initiative as well.

Milica Jevtic, CSR and Regulatory Affairs Manager, AIJN

European Harmony

Industry needs an effective chain control system, which enables the detection of non-conformance, to trace it back to its source and to stop the danger of repetition and proliferation at a reasonable cost level.

Unfortunately, some players in the market are still choosing a very special approach to overcome hard competition.

As most of the known adulterations and infringements of fair competition are not health related, the responsibility for stopping such problems has become more and more a task for the industry itself.

Already in 1974 the German industry recognised the need for an industrial self-control and established the: "Schutzgemeinschaft der Fruchtsaftindustrie e.V. (SGF)", today SGF International e. V.
Also in other countries like France (QUALIJUS), Spain (AEAZN) and United Kingdom (BSDA) similar control systems were founded.

In order to harmonise already developed systems and to make industrial control even more effective and efficient the EU fruit juice industry through its representative association the AIJN founded the European Quality Control System (EQCS) in 1994.

EQCS is the umbrella organisation for European market and bottler inspections. It was re-established in December 2009. The object of the association is:

- to promote free and fair competition;
- to protect the manufacturers and traders in raw and finished products against unfair competition arising from infringement of legal requirements and accepted industry standards;
- to support them in the execution of their duties of care and to protect them from unjustified attacks;
- safeguard the quality and authenticity of fruit juices in the interests of consumers.

For the participants it was clear that instead of the individual approach it is better to aim at carrying out only one test in an undisrupted chain on the condition that the traceability throughout the chain is secured. Traceability means the possibility to trace each product (and related quality deviations) back to its source (from the bottle back to the tree).

The benefits for the industry are obvious:

- buying from approved participants of the control scheme requires less own authenticity testing of raw materials.
- it provides consumers with products fulfilling their need and expectations
- it reduces safety risks due to hygiene audits and monitoring health related parameters
- it takes away unfair competition in the market
- it avoids negative publicity which could damage the image of our healthy product juice

Packers of consumer goods can directly become a participant in a national or regional member system (AEAZN; BSDA; QUALIJUS; SGF) of the EQCS.

Raw material suppliers (worldwide) can directly participate in SGF with its raw material assurance system SGF/IRMA.

Now the EQCS has 5 members, the 4 named control systems and AIJN.

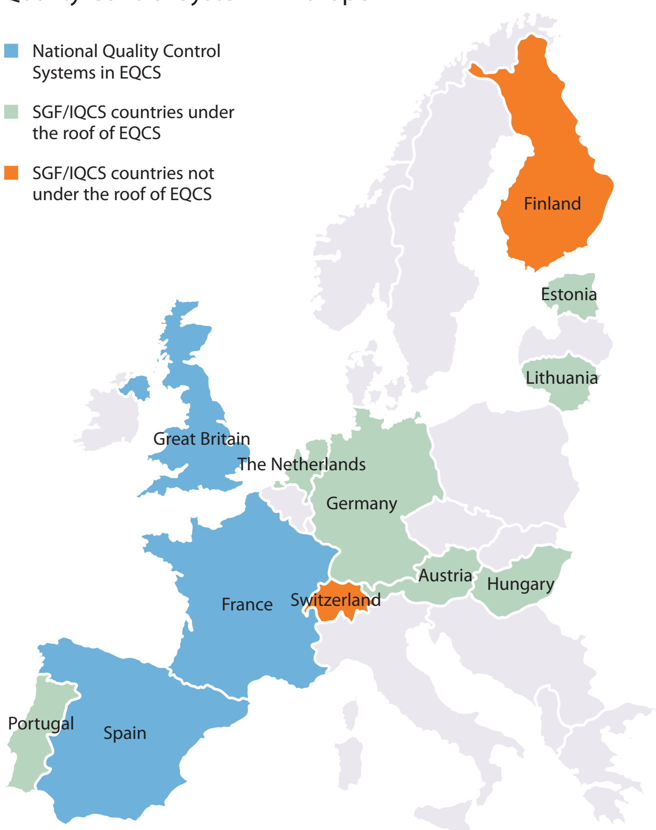
Apart from the EQCS's responsibility for coordination and harmonisation, full control responsibility for the finished goods, markets and bottlers lies with the individual control systems, as the members of the EQCS. These are responsible either for an individual country (National Control Systems NQCS) or for several countries (Regional Control Systems RQCS).

SGF/IQCS is such a regional control system, run by SGF. Currently, the countries Austria, Estonia, Germany, Hungary, Lithuania, the Netherlands and Portugal belong to this regional control system. In addition, IQCS has individual member companies in Finland and Switzerland.

The basis for testing quality, authenticity and safety parameters by the EQCS and its European member systems, and SGF for its members in different categories (amongst them about 350 raw material suppliers in almost 60 countries), is the AIJN Code of Practice.

The EQCS organises annually a Europe wide juice control campaign, the EQCS campaign. Its target is to get an overview on the market concerning the quality and authenticity of the European products (NFC and fruit juice made from concentrate). For the first time in the history of industrial self-control such an overview was prepared in 2011 for 260 juice samples from 26 countries of the European Union. First the juices underwent the SGF Profiling. Afterwards the

Quality Control System in Europe



samples were analysed conventionally. Additionally all packages were controlled on correct declaration. The results are comparable and give an excellent overview on the European market situation.

In addition, in that process a comparison is prepared between countries running an own control system and those which do not have a control scheme. It is clearly illustrated that the number of deviating products is essentially higher in countries without an own control system than in those running one.

In 2016, EQCS organised a campaign on tomato juice. 41 tomato juices (16 juices NFC, 25 from concentrate) from all over Europe were tested by SGF Service Plus GmbH for authenticity and safety criteria. Detailed results can be provided in a neutralised form on request.

In 2017, the EQCS control campaign will focus on orange juice (NfC, from concentrate and nectars).

Worldwide Raw Material Control

On request of numerous members, in 1986 the SGF controls, which had initially focussed on market monitoring activities, were supplemented by the Voluntary Control System (VCS). The aim was to ascertain irregularities, anomalies and adulterations of products already during the initial production phases of processing raw material and finished goods, and not to wait until these get to the market. Since 1986, the SGF-controls have therefore also included the manufacturers of raw materials and semi-finished products from companies all around the world.

The control system that permits the traceability of a juice "from the tree to the bottle" is based on voluntary participants who open the doors of their semi- and finished goods facilities for the SGF auditors and allow samples to be taken of the semi- or finished goods from on-going production and from the warehouse for corresponding testing, together with hygiene audits of the plant facilities.

The "complete control chain" from processing the fruit through to the finished product can provide verification of perfect quality within next-to-no time, even if natural changes resulting from origin, growth or variety characteristics cause deviations from normal expectations. At the same time, it is easy to detect, localise and prove illicit product manipulation. Any infringements against the food regulations or against the rules of the system (VCS Implementing Provisions) trigger corrective action by the SGF with corresponding follow-up inspections.

The VCS intends to give its participants greater security in purchasing semi-finished products and to protect the branch altogether from dishonest competitors. In addition, the VCS should help to safeguard the constantly growing quality expectations of retailers and consumers. Participation in the control system is intended to help the company in fulfilling its statutory obligation to put only perfect goods into circulation.

However, it is only possible to profit from the advantages of the system when it is supported by a qualified majority of reputable manufacturers who, above all, fulfil the corresponding requirements. Especially the cooperation with companies having an exemplary quality management is therefore important as they form the quality standard of the whole branch.

One of the two pillars of the Voluntary Control System is International Raw Material Assurance SGF/IRMA. In the meantime, SGF/IRMA has become a widely known brand that vouches for the quality of the certified products. Members place their trust in the certification of plants when purchasing their raw materials.

IRMA is responsible for checking the raw material markets as well as fruit processors, blending stations, traders, brokers, warehouses, coldstores and transport companies participating in the VCS.

Since 1996, SGF has the general order of the European Quality Control System (EQCS) to act as the central raw material assurance institution for the European control systems.

The globalisation of the raw material market leads to a need for a global industrial strategy for quality assurance and fair competition. SGF/IRMA is offering the right concept for that. SGF therefore has also entered into individual agreements with a number of individual countries outside the European Union (Turkey, Russia, China and South Africa). Hence, the semi-finished goods deliveries of members to these countries are also controlled.

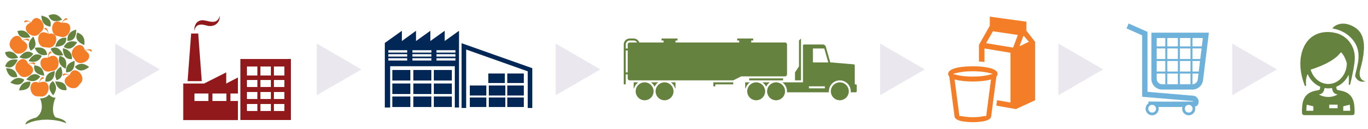
Every company, whether SGF member or not, receives feedback about every analysed sample together with an evaluation and summary of the results of the chemical analysis and/or labelling check. Inconspicuous analysis findings are followed by so-called OK feedbacks. In these cases, all examined parameters comply with the statutory requirements respectively existing industrial standards, such as the AIJN/Code of Practice for the assessment of fruit and vegetable juice.

In the case of nonconformities with the authenticity or labelling with minor effects on the competition situation, the affected companies receive corresponding information letters with the request to comply with the rules and correct the nonconformities. Member companies are expected to derive corresponding corrective actions accordingly. Follow-up controls then check implementation of the correction suggestions as the case may be.

In any case, the acknowledged product qualities offered by the juice industry may have contributed to the increase in per capita consumption figures over the past 40 years. This success should be secured and expanded.

Alexandra Heinermann, General Manager, SGF International e.V.

From Grove to Glass



Austria

Population: **8.7 million**

Total fruit juice and nectars

Volume, million litres*		2012	2013	2014	2015	2016	15-16 Gr%
Total		**229**	**213**	**197**	**208**	**200**	**-3.4%**
	Top two brands						**2016 Vol ml**
Juice	Happy Day						29.3
	Hofer (PL)						23.0
Nectars	Happy Day						15.4
	Hofer (PL)						12.0

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	153	144	132	143	140	-2.6%
Branded	85	84	75	80	78	-1.5%
Private label	68	60	57	64	61	-4.0%
Ambient	136	128	113	118	111	-5.6%
Branded	75	75	65	64	59	-6.7%
Private label	61	54	49	54	52	-4.2%
From concentrate	133	126	111	115	109	-5.6%
Branded	72	72	62	61	57	-6.9%
Private label	61	54	49	54	52	-4.2%
Not from concentrate	3	3	3	3	3	-4.2%
Branded	3	3	3	3	3	-4.2%
Chilled	17	16	19	25	28	11.2%
Branded	10	9	11	16	19	19.7%
Private label	7	7	8	9	9	-3.0%
Not from concentrate	17	16	19	25	28	11.2%
Branded	10	9	11	16	19	19.7%
Private label	7	7	8	9	9	-3.0%
of which are smoothies	3	3	5	6	7	17.3%
Branded	3	3	3	4	5	26.7%
Private label	0	0	2	2	3	3.6%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	76	68	65	64	61	-5.3%
Branded	45	42	40	39	37	-5.7%
Private label	31	26	25	25	24	-4.6%
Ambient	76	68	65	64	61	-5.3%
Branded	45	42	40	39	37	-5.7%
Private label	31	26	25	25	24	-4.6%
From concentrate	76	68	65	64	61	-5.3%
Branded	45	42	40	39	37	-5.7%
Private label	31	26	25	25	24	-4.6%

Belgium

Population: **11.3 million**

Total fruit juice and nectars

Volume, million litres*		2012	2013	2014	2015	2016	15-16 Gr%
Total		**213**	**214**	**210**	**199**	**181**	**-9.3%**
	Top two brands						**2016 Vol ml**
Juice	Minute Maid						14.9
	Appelsientje						8.0
Nectars	Minute Maid						10.2
	Looza						4.7

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	177	178	174	165	150	-8.86%
Branded	68	68	66	63	58	-7.9%
Private label	110	109	108	102	92	-9.8%
Ambient	160	158	154	144	131	-8.9%
Branded	55	54	51	48	45	-6.4%
Private label	105	104	103	96	86	-10.2%
From concentrate	160	158	153	144	131	-8.9%
Branded	55	54	51	48	45	-6.4%
Private label	105	104	103	96	86	-10.2%
Not from concentrate	0	0	0	0	0	0.0%
Branded	0	0	0	0	0	0.0%
Chilled	17	19	21	21	19	-8.4%
Branded	12	14	15	15	13	-10.6%
Private label	5	5	5	6	6	-2.6%
From concentrate	0	0	0	0	0	0.0%
Branded	0	0	0	0	0	0.0%
Not from concentrate	17	19	21	20	19	-8.5%
Branded	12	14	15	15	13	-10.9%
Private label	5	5	5	6	6	-2.6%
of which are smoothies	0	0	0	1	1	53.1%
Branded	0	0	0	0	1	69.1%
Private label	0	0	0	0	0	25.0%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	36	36	36	34	31	-11.1%
Branded	22	23	24	22	21	-8.2%
Private label	13	13	12	12	10	-16.7%
Ambient	35	35	35	33	30	-11.4%
Branded	21	23	23	21	20	-8.5%
Private label	13	13	12	12	10	-16.7%
From concentrate	35	35	35	33	30	-11.4%
Branded	21	23	23	21	20	-8.5%
Private label	13	13	12	12	10	-16.7%
Chilled	1	1	1	1	1	0.0%
Branded	1	1	1	1	1	0.0%
From concentrate	1	1	1	1	1	0.0%
Branded	1	1	1	1	1	0.0%
of which are smoothies	1	0	0	0	0	-14.3%
Branded	1	0	0	0	0	-14.3%

France

Population: **66.9 million**

Total fruit juice and nectars

Volume, million litres*		2012	2013	2014	2015	2016	15-16 Gr%
Total		**1,662**	**1,599**	**1,526**	**1,482**	**1,415**	**-4.5%**

	Top two brands	**2016 Vol ml**
Juice	Tropicana	186.0
	Joker (Eckes-Granini)	111.7
Nectars	Pressade	22.9
	Joker (Eckes-Granini)	11.8

Fruit juice (100% juice content)

		2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice		1,314	1,281	1,237	1,221	1,174	-3.9%
	Branded	583	586	579	589	591	0.4%
	Private label	731	695	658	633	583	-7.9%
Ambient		1,152	1,111	1,062	1,037	978	-5.7%
	Branded	471	468	456	457	445	-2.7%
	Private label	682	643	606	580	533	-8.1%
From concentrate		545	509	472	451	411	-9.0%
	Branded	160	151	145	144	135	-6.3%
	Private label	385	357	327	307	276	-10.3%
Not from concentrate		608	602	590	586	567	-3.2%
	Branded	311	317	312	313	310	-1.1%
	Private label	297	286	278	273	257	-5.7%
of which are smoothies		0	0	0	0	0	0.0%
	Branded	0	0	0	0	0	0.0%
Chilled		162	170	175	184	196	6.4%
	Branded	112	118	122	132	146	11.1%
	Private label	49	52	53	52	50	-5.3%
From concentrate		162	170	175	184	196	6.4%
	Branded	112	118	122	132	146	11.1%
	Private label	49	52	53	52	50	-5.3%
of which are smoothies		15	15	14	13	17	29.1%
	Branded	8	8	5	8	12	44.4%
	Private label	7	7	9	5	6	5.7%

Nectars (25-99% juice content)

		2012	2013	2014	2015	2016	15-16 Gr%
Total nectars		348	319	289	261	241	-7.5%
	Branded	81	76	73	75	83	10.2%
	Private label	267	243	216	185	158	-14.7%
Ambient		346	317	289	261	241	-7.6%
	Branded	80	75	73	75	83	9.7%
	Private label	267	242	215	185	158	-14.7%
From concentrate		346	317	289	261	241	-7.6%
	Branded	80	75	73	75	83	9.7%
	Private label	267	242	215	185	158	-14.7%
of which are smoothies		5	4	5	5	5	1.4%
	Branded	2	2	1	2	1	-3.6%
	Private label	3	3	3	3	3	3.9%
Chilled		2	1	0	0	1	100.0%
	Branded	1	1	0	0	0	0.0%
	Private label	0	0	0	0	0	10.3%
From concentrate		2	1	0	0	0	10.3%
	Branded	1	1	0	0	0	0.0%
	Private label	0	0	0	0	0	10.3%
From concentrate		0	0	0	0	0	0.0%
	Branded	0	0	0	0	0	0.0%
of which are smoothies		0	0	0	0	0	0.0%
	Branded	0	0	0	0	0	0.0%

Germany

Population: **82.6 million**

Total fruit juice and nectars

Volume, million litres*		2012	2013	2014	2015	2016	15-16 Gr%
Total		**2,609**	**2,488**	**2,408**	**2,397**	**2,361**	**-1.5%**

	Top two brands	**2016 Vol ml**
Juice	Valensina	124.2
	Hohes C	112.1
Nectars	Punica	90.7
	Granini	86.4

Fruit juice (100% juice content)

		2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice		1,824	1,747	1,669	1,640	1,617	-1.4%
	Branded	936	915	900	903	904	0.2%
	Private label	888	832	768	737	712	-3.3%
Ambient		1,758	1,670	1,570	1,530	1,489	-2.7%
	Branded	875	839	807	801	790	-1.4%
	Private label	883	831	763	730	699	-4.2%
From concentrate		1,528	1,439	1,336	1,283	1,229	-4.2%
	Branded	819	781	751	743	729	-1.9%
	Private label	709	657	585	540	500	-7.4%
Not from concentrate		230	232	234	247	259	5.0%
	Branded	56	58	56	58	61	5.3%
	Private label	174	174	179	189	199	4.9%
of which are smoothies		0	0	0	0	0	3.3%
	Branded	0	0	0	0	0	3.3%
Chilled		66	77	98	109	128	16.9%
	Branded	60	76	94	102	115	12.0%
	Private label	5	1	5	7	13	86.9%
From concentrate		38	41	50	54	58	7.5%
	Branded	38	41	50	54	58	7.5%
Not from concentrate		28	36	49	56	70	26.0%
	Branded	22	35	44	49	57	17.0%
	Private label	5	1	5	7	13	86.9%
of which are smoothies		9	8	17	25	39	56.7%
	Branded	3	7	12	18	26	44.5%
	Private label	5	1	5	7	13	86.9%

Nectars (25-99% juice content)

		2012	2013	2014	2015	2016	15-16 Gr%
Total nectars		785	741	739	757	744	-1.7%
	Branded	455	429	406	412	401	-2.8%
	Private label	331	312	333	345	343	-0.3%
Ambient		778	733	735	753	740	-1.7%
	Branded	447	421	402	408	397	-2.8%
	Private label	331	312	333	345	343	-0.3%
From concentrate		778	732	734	752	739	-1.7%
	Branded	447	420	401	407	396	-2.8%
	Private label	331	312	333	345	343	-0.3%
Not from concentrate		0	1	1	1	1	-2.4%
	Branded	0	1	1	1	1	-2.4%
Chilled		5	4	1	1	1	8.2%
	Branded	5	4	1	1	1	8.2%
From concentrate		5	4	1	1	1	8.2%
	Branded	5	4	1	1	1	8.2%
of which are smoothies		4	4	1	1	1	7.9%
	Branded	4	4	1	1	1	7.9%

Italy

Population: **61.4 million**

Total fruit juice and nectars

Volume, million litres*		2012	2013	2014	2015	2016	15-16 Gr%
Total		**774**	**726**	**690**	**699**	**659**	**-5.7%**
	Top two brands						**2016 Vol ml**
Juice	Santal						17.0
	Skipper						13.5
Nectars	Yoga						71.1
	Skipper						52.3

Fruit juice (100% juice content)

		2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice		155	141	133	134	118	-11.5%
	Branded	102	90	84	84	72	-14.3%
	Private label	52	51	49	49	46	-6.6%
Ambient		139	128	121	121	104	-13.6%
	Branded	93	83	78	77	64	-16.9%
	Private label	45	45	43	43	40	-7.8%
From concentrate		139	127	119	119	103	-13.9%
	Branded	93	82	76	76	63	-17.4%
	Private label	45	45	43	43	40	-7.8%
Not from concentrate		0	1	1	2	2	7.2%
	Branded	0	1	1	2	2	7.2%
of which are smoothies		1	1	1	0	0	-58.8%
	Branded	1	1	1	0	0	-58.8%
Chilled		16	13	12	13	14	8.6%
	Branded	9	7	6	7	8	14.4%
	Private label	7	6	6	6	6	1.9%
From concentrate		4	3	2	3	4	32.8%
	Branded	4	3	2	3	4	32.8%
Not from concentrate		12	10	10	10	10	0.9%
	Branded	5	4	4	4	4	-0.6%
	Private label	7	6	6	6	6	1.9%
of which are smoothies		2	1	1	1	1	-7.6%
	Branded	2	1	1	1	1	-7.6%

Nectars (25-99% juice content)

		2012	2013	2014	2015	2016	15-16 Gr%
Total nectars		620	584	557	565	541	-4.4%
	Branded	407	373	351	357	339	-5.0%
	Private label	213	212	206	208	201	-3.2%
Ambient		620	584	557	565	541	-4.4%
	Branded	407	373	351	357	339	-5.0%
	Private label	213	212	206	208	201	-3.2%
From concentrate		620	584	557	565	541	-4.4%
	Branded	407	373	351	357	339	-5.0%
	Private label	213	212	206	208	201	-3.2%

Netherlands

Population: **17.0 million**

Total fruit juice and nectars

Volume, million litres*		2012	2013	2014	2015	2016	15-16 Gr%
Total		**486**	**464**	**446**	**431**	**404**	**-6.2%**
	Top two brands						**2016 Vol ml**
Juice	Appelsientje						46.1
	Coolbest						22.2
Nectars	Appelsientje						14.2
	Hero (Hero Group)						10.1

Fruit juice (100% juice content)

		2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice		289	272	257	245	230	-6.0%
	Branded	164	149	141	138	128	-7.6%
	Private label	125	123	116	107	102	-4.0%
Ambient		203	185	170	156	144	-8.1%
	Branded	109	95	88	82	73	-10.9%
	Private label	94	90	83	74	71	-5.0%
From concentrate		200	182	165	149	136	-8.8%
	Branded	106	92	82	75	66	-12.3%
	Private label	94	90	82	74	70	-5.3%
Not from concentrate		3	4	6	7	8	7.5%
	Branded	3	4	6	7	7	5.2%
	Private label	0	0	0	1	1	33.3%
Chilled		86	87	86	88	86	-2.4%
	Branded	55	54	53	56	54	-2.8%
	Private label	30	33	34	33	32	-1.8%
From concentrate		32	31	31	33	31	-7.2%
	Branded	32	31	31	33	31	-7.2%
Not from concentrate		54	55	55	55	55	0.4%
	Branded	23	23	22	23	23	3.7%
	Private label	30	33	34	33	32	-1.8%
of which are smoothies		2	3	3	3	3	6.2%
	Branded	2	3	3	3	3	6.2%

Nectars (25-99% juice content)

		2012	2013	2014	2015	2016	15-16 Gr%
Total nectars		197	192	189	186	174	-6.4%
	Branded	89	84	80	77	71	-7.8%
	Private label	108	108	110	109	103	-5.4%
Ambient		153	149	147	146	138	-5.9%
	Branded	57	53	50	50	47	-5.4%
	Private label	96	95	97	97	91	-6.1%
From concentrate		153	149	147	146	137	-6.0%
	Branded	57	53	50	49	46	-5.7%
	Private label	96	95	97	97	91	-6.1%
Not from concentrate		0	0	0	1	1	30.0%
	Branded	0	0	0	1	1	30.0%
Chilled		44	43	43	40	37	-8.2%
	Branded	32	31	30	27	24	-12.1%
	Private label	12	12	13	13	13	0.0%
From concentrate		44	43	43	40	37	-8.2%
	Branded	32	31	30	27	24	-12.1%
	Private label	12	12	13	13	13	0.0%
of which are smoothies		0	0	0	0	0	0.0%
	Branded	0	0	0	0	0	0.0%

Poland

Population: **38.4 million**

Total fruit juice and nectars

Volume, million litres*		2012	2013	2014	2015	2016	15-16 Gr%
Total		**695**	**673**	**699**	**757**	**800**	**5.7%**
	Top two brands						**2016 Vol ml**
Juice	Tymbark						85.2
	Hortex						76.2
Nectars	Tymbark						54.2
	Hortex						39.4

Fruit juice (100% juice content)

		2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice		449	438	456	504	543	7.9%
	Branded	391	381	396	426	458	7.5%
	Private label	58	57	60	78	85	9.8%
Ambient		391	378	392	437	473	8.3%
	Branded	337	326	338	369	401	8.6%
	Private label	54	52	54	68	72	6.5%
From concentrate		383	364	371	386	391	1.3%
	Branded	329	314	320	333	344	3.4%
	Private label	54	51	51	53	47	-12.2%
Not from concentrate		8	14	21	51	82	60.9%
	Branded	8	12	18	37	57	55.5%
	Private label	0	2	3	15	26	74.7%
Chilled		58	60	64	67	70	5.1%
	Branded	54	56	58	57	57	0.4%
	Private label	4	4	6	10	13	32.7%
From concentrate		10	9	9	9	10	7.4%
	Branded	10	9	9	9	9	3.4%
	Private label	0	0	0	1	1	57.1%
Not from concentrate		48	51	55	57	60	4.8%
	Branded	44	46	49	48	48	-0.2%
	Private label	4	4	6	9	12	30.8%
of which are smoothies		8	8	8	8	8	5.3%
	Branded	8	8	8	8	8	5.3%

Nectars (25-99% juice content)

		2012	2013	2014	2015	2016	15-16 Gr%
Total nectars		246	235	243	253	257	1.5%
	Branded	148	142	147	153	166	8.0%
	Private label	98	93	96	100	91	-8.5%
Ambient		244	234	243	253	257	1.5%
	Branded	146	141	147	153	166	8.0%
	Private label	98	93	96	100	91	-8.5%
From concentrate		244	234	243	253	257	1.5%
	Branded	146	141	147	153	166	8.0%
	Private label	98	93	96	100	91	-8.5%
of which are smoothies		0	0	0	0	0	0.0%
	Branded	0	0	0	0	0	0.0%
Chilled		2	1	0	0	0	0.0%
	Branded	2	1	0	0	0	0.0%
From concentrate		2	1	0	0	0	0.0%
	Branded	2	1	0	0	0	0.0%

Spain

Population: **46.4 million**

Total fruit juice and nectars

Volume, million litres*		2012	2013	2014	2015	2016	15-16 Gr%
Total		**986**	**926**	**910**	**886**	**831**	**-6.3%**
	Top two brands						**2016 Vol ml**
Juice	Don Simon						88.2
	Juver						40.2
Nectars	Don Simon						101.4
	Juver						39.1

Fruit juice (100% juice content)

		2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice		444	394	376	366	367	0.4%
	Branded	233	216	221	204	200	-2.3%
	Private label	211	178	155	162	168	3.8%
Ambient		398	350	333	323	319	-1.0%
	Branded	213	197	201	186	178	-4.2%
	Private label	185	153	132	136	141	3.4%
From concentrate		323	273	253	240	236	-1.7%
	Branded	179	162	161	147	140	-4.5%
	Private label	144	111	91	93	96	2.7%
Not from concentrate		74	77	80	82	83	0.9%
	Branded	33	35	40	39	38	-3.4%
	Private label	41	42	40	43	46	4.8%
Chilled		47	44	43	43	48	10.6%
	Branded	21	20	20	18	21	17.0%
	Private label	26	25	23	25	27	6.0%
From concentrate		13	7	4	3	3	-9.4%
	Branded	1	0	0	0	0	0.0%
	Private label	13	7	4	3	3	-9.4%
Not from concentrate		33	37	38	40	45	12.2%
	Branded	20	19	20	18	21	17.0%
	Private label	13	18	19	22	24	8.2%

Nectars (25-99% juice content)

		2012	2013	2014	2015	2016	15-16 Gr%
Total nectars		542	532	535	521	464	-10.9%
	Branded	197	198	193	190	170	-10.7%
	Private label	345	334	342	330	294	-11.1%
Ambient		541	531	533	518	460	-11.1%
	Branded	344	334	340	328	291	-11.2%
	Private label	197	197	193	190	169	-11.0%
From concentrate		540	531	533	518	460	-11.1%
	Branded	344	333	340	328	291	-11.2%
	Private label	197	197	193	190	169	-11.0%
Not from concentrate		0	0	0	0	0	-100.0%
	Branded	0	0	0	0	0	-100.0%
Chilled		1	1	2	2	3	32.4%
	Branded	1	1	1	2	2	7.4%
	Private label	0	0	0	0	1	238.5%
From concentrate		1	1	0	0	1	141.5%
	Branded	1	0	0	0	0	-26.7%
	Private label	0	0	0	0	1	238.5%
Not from concentrate		0	0	1	2	2	10.0%
	Branded	0	0	1	2	2	10.0%
of which are smoothies		0	0	0	0	1	213.8%
	Branded	0	0	0	0	0	-8.3%
	Private label	0	0	0	0	1	370.6%

Sweden

Population: **10.0 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**244**	**238**	**233**	**232**	**225**	**-3.2%**

	Top two brands	2016 Vol ml
Juice	Bravo (Skanemejerier)	56.8
	God Morgon	24.8
Nectars	ProViva	15.5
	Glockengold	8.6

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	190	183	176	175	169	-3.0%
Branded	150	145	138	139	136	-2.2%
Private label	40	38	37	35	33	-6.3%
Ambient	56	50	47	45	43	-4.9%
Branded	27	26	25	24	23	-1.5%
Private label	29	24	22	22	20	-8.4%
From concentrate	53	48	44	42	40	-5.5%
Branded	25	23	22	20	20	-2.2%
Private label	29	24	22	22	20	-8.4%
Not from concentrate	3	3	3	3	3	3.2%
Branded	3	3	3	3	3	3.2%
of which are smoothies	1	1	1	2	2	13.3%
Branded	1	1	1	2	2	13.3%
Chilled	134	133	129	129	126	-2.4%
Branded	123	118	114	116	113	-2.3%
Private label	11	14	15	14	13	-2.8%
From concentrate	107	106	101	98	93	-4.9%
Branded	99	95	89	87	83	-4.9%
Private label	9	11	12	10	10	-4.3%
Not from concentrate	27	27	27	32	34	5.2%
Branded	24	23	24	29	30	5.5%
Private label	3	3	3	3	3	2.4%
of which are smoothies	2	1	1	2	2	9.5%
Branded	1	1	1	1	1	5.3%
Private label	0	0	0	0	0	37.5%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	54	55	58	57	55	-3.7%
Branded	39	39	44	45	44	-3.5%
Private label	15	16	14	12	12	-4.1%
Ambient	35	33	35	35	34	-4.0%
Branded	20	21	24	26	25	-3.4%
Private label	15	12	11	10	9	-5.7%
From concentrate	35	33	35	35	34	-4.0%
Branded	20	21	24	26	25	-3.4%
Private label	15	12	11	10	9	-5.7%
of which are smoothies	0	0	0	0	0	21.8%
Branded	0	0	0	0	0	-0.5%
Private label	0	0	0	0	0	23.1%
Chilled	19	22	23	22	22	-3.0%
Branded	19	19	20	20	19	-3.7%
Private label	0	3	3	3	3	1.9%
From concentrate	19	22	23	22	21	-4.7%
Branded	19	19	20	20	18	-5.6%
Private label	0	3	3	3	3	1.9%
Not from concentrate	0	0	0	0	0	0.0%
Branded	0	0	0	0	0	0.0%
of which are smoothies	0	0	0	0	0	0.0%
Branded	0	0	0	0	0	0.0%

United Kingdom

Population: **65.6 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**1,326**	**1,275**	**1,190**	**1,141**	**1,116**	**-2.1%**

	Top two brands	2016 Vol ml
Juice	Innocent	185.3
	Tropicana	144.9
Nectars	J2O	47.1
	Ocean Spray	21.1

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	1,144	1,079	996	948	928	-2.1%
Branded	519	505	476	471	495	5.0%
Private label	625	574	519	477	433	-9.1%
Ambient	458	395	352	313	259	-17.3%
Branded	143	113	97	87	68	-22.0%
Private label	314	282	255	226	191	-15.4%
From concentrate	458	395	352	313	259	-17.3%
Branded	143	113	97	87	68	-22.0%
Private label	314	282	255	226	191	-15.4%
Chilled	687	684	644	635	669	5.4%
Branded	376	392	379	384	427	11.1%
Private label	311	292	264	250	242	-3.4%
From concentrate	258	242	221	214	208	-2.6%
Branded	18	16	15	14	13	-3.6%
Private label	239	226	206	200	195	-2.5%
Not from concentrate	429	442	422	421	461	9.5%
Branded	357	376	364	370	414	11.7%
Private label	71	65	58	50	47	-7.0%
of which are smoothies	58	54	52	52	54	4.1%
Branded	52	49	47	48	50	5.5%
Private label	5	5	5	5	4	-10.9%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	182	196	194	193	188	-2.4%
Branded	161	175	175	174	171	-1.5%
Private label	22	21	19	19	17	-10.5%
Ambient	141	138	150	153	142	-7.5%
Branded	135	132	144	148	136	-8.1%
Private label	6	6	6	5	6	9.3%
From concentrate	138	136	141	144	132	-8.2%
Branded	132	130	136	139	127	-8.9%
Private label	6	6	6	5	6	9.3%
Not from concentrate	2	2	9	9	10	4.1%
Branded	2	2	9	9	10	4.1%
Chilled	42	57	44	39	46	17.7%
Branded	26	43	30	26	35	36.3%
Private label	16	15	13	13	11	-18.4%
From concentrate	40	43	34	30	37	21.1%
Branded	25	29	20	17	26	51.9%
Private label	16	15	13	13	11	-18.4%
Not from concentrate	1	14	10	9	9	5.7%
Branded	1	14	10	9	9	5.7%
of which are smoothies	16	16	16	15	20	32.7%
Branded	9	10	10	9	15	68.2%
Private label	7	6	6	6	5	-19.2%

Bulgaria

Population: **7.1 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**67**	**63**	**64**	**62**	**61**	**-2.3%**

	Top two brands	2016 Vol ml
Juice	Cappy	2.3
	Pfanner	1.4
Nectars	Cappy	15.1
	Queens	6.7

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	16	14	14	14	13	-3.4%
Branded	14	12	13	12	12	-1.7%
Private label	2	2	2	1	1	-17.5%
Ambient	15	14	14	13	13	-3.3%
Chilled	0	0	0	0	0	-5.7%
From concentrate	15	13	13	12	11	-3.7%
Not from concentrate	1	1	2	2	2	-1.5%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	51	49	49	49	48	-2.0%
Branded	43	41	41	42	42	1.2%
Private label	8	8	8	7	6	-21.0%

Croatia

Population: **4.2 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**68**	**67**	**57**	**56**	**55**	**-3.1%**

	Top two brands	2016 Vol ml
Juice	Juicy	3.9
	Cappy	1.2
Nectars	To	10.1
	Juicy	4.8

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	12	12	13	14	14	0.1%
Branded	9	10	11	12	11	-2.6%
Private label	3	2	3	2	3	12.4%
Ambient	12	12	13	14	14	0.1%
Chilled	N/A	N/A	N/A	N/A	N/A	N/A
From concentrate	12	12	11	12	12	-3.2%
Not from concentrate	0	0	2	2	2	19.9%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	57	55	44	42	41	-4.2%
Branded	46	46	37	36	35	-2.7%
Private label	10	9	7	6	5	-13.3%

Cyprus

Population: **1.2 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**32**	**30**	**29**	**28**	**28**	**-1.6%**

	Top two brands	2016 Vol ml
Juice	N/A	N/A
	N/A	N/A
Nectars	N/A	N/A
	N/A	N/A

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	21	19	18	18	17	-1.3%
Branded	21	18	17	17	17	-0.9%
Private label	0.0	1.1	1.1	0.9	1	-8.1%
Ambient	20	18	18	17	17	-2.9%
Chilled	0.7	0.7	0.7	0.7	1	0.4%
From concentrate	21	19	18	18	17	-2.3%
Not from concentrate	0	0	0	0	0	0.0%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	11	11	10	10	10	-2.1%
Branded	11	10	10	10	10	-1.9%
Private label	0.0	0.6	0.6	0.5	0.5	-7.0%

Czech Republic

Population: **10.6 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**82**	**89**	**93**	**101**	**108**	**6.9%**

	Top two brands	2016 Vol ml
Juice	Relax	13.8
	Hello	7.3
Nectars	Relax	14.9
	Cappy	5.3

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	49	51	55	59	64	7.9%
Branded	32	37	41	44	48	9.0%
Private label	17	15	14	15	15	4.3%
Ambient	48	50	54	58	63	7.8%
Chilled	1	1	1	1	1	15.4%
From concentrate	48	48	51	55	59	7.8%
Not from concentrate	1	3	4	5	5	9.2%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	34	37	38	42	44	5.4%
Branded	22	27	28	31	34	9.2%
Private label	12	11	10	11	10	-5.5%

Denmark

Population: **5.7 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**111**	**111**	**108**	**106**	**106**	**0.2%**

	Top two brands	2016 Vol ml
Juice	Rynkeby	17.7
	16 Range	7.4
Nectars	Rynkeby	2.4
	Innocent	0.4

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	110	109	103	100	101	0.3%
Branded	56	54	52	51	53	2.7%
Private label	53	56	51	49	48	-2.2%
Ambient	99	98	90	87	86	-0.9%
Chilled	11	12	13	14	15	7.6%
From concentrate	101	98	91	86	83	-3.3%
Not from concentrate	9	12	12	14	17	22.1%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	1	1	4	6	6	-1.8%
Branded	1	1	4	4	4	-7.3%
Private label	0	0	1	1	1	19.3%

Estonia

Population: **1.3 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**27**	**26**	**25**	**25**	**24**	**-2.1%**

	Top two brands	2016 Vol ml
Juice	Aura	2.8
	Poltsamaa	1.4
Nectars	Aura	5.1
	Poltsamaa	2.1

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	12	12	12	12	13	7.2%
Branded	10	10	10	10	11	9.1%
Private label	2	2	2	2	2	-1.7%
Ambient	11	12	12	12	12	7.4%
Chilled	1	1	1	1	1	3.6%
From concentrate	11	11	11	11	12	6.4%
Not from concentrate	1	1	1	1	1	15.2%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	15	14	13	12	11	-11.4%
Branded	15	13	12	12	10	-11.8%
Private label	1	1	1	1	1	-4.6%

Finland

Population: **5.5 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**116**	**112**	**103**	**99**	**97**	**-2.0%**

	Top two brands	2016 Vol ml
Juice	Marli	15.5
	Rainbow (PL)	14.8
Nectars	Marli	8.7
	Valio	0.9

Fruit juice (100% juice content)

Total fruit juice	101	97	89	86	84	-1.8%
Branded	65	62	57	53	51	-3.4%
Private label	36	35	32	33	33	0.8%
Ambient	58	55	52	50	50	-0.3%
Chilled	43	42	38	36	35	-3.9%
From concentrate	89	85	79	76	79	3.1%
Not from concentrate	13	12	10	9	5	-42.5%

Nectars (25-99% juice content)

Total nectars	15	15	13	13	12	-3.4%
Branded	14	14	13	12	12	-3.5%
Private label	0	0	0	0	0	-0.5%

Greece

Population: **10.8 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**150**	**137**	**131**	**131**	**127**	**-2.7%**

	Top two brands	2016 Vol ml
Juice	Amita	32.6
	Life	7.3
Nectars	Amita	32.6
	Life	7.6

Fruit juice (100% juice content)

Total fruit juice	89	78	73	72	70	-2.3%
Branded	70	61	58	58	58	-0.9%
Private label	19	17	15	14	12	-8.1%
Ambient	71	64	60	58	56	-2.9%
Chilled	17	14	14	14	14	0.4%
From concentrate	89	78	72	71	69	-2.3%
Not from concentrate	0	0	1	1	1	-0.9%

Nectars (25-99% juice content)

Total nectars	61	59	58	59	57	-3.2%
Branded	45	44	42	43	42	-1.9%
Private label	17	15	16	15	14	-7.0%

Hungary

Population: **9.8 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**95**	**91**	**101**	**114**	**123**	**7.8%**

	Top two brands	2016 Vol ml
Juice	Cappy	9.2
	Happy Day	8.0
Nectars	Sio	19.2
	Cappy	9.7

Fruit juice (100% juice content)

Total fruit juice	37	36	40	44	47	8.4%
Branded	26	27	28	32	35	7.4%
Private label	12	9	12	11	13	11.0%
Ambient	37	36	40	44	47	8.4%
Chilled	0	0	0	0	0	-0.4%
From concentrate	36	35	38	41	45	8.3%
Not from concentrate	2	1	1	2	2	9.8%

Nectars (25-99% juice content)

Total nectars	58	55	61	71	76	7.4%
Branded	34	34	36	51	59	13.8%
Private label	24	21	26	19	17	-9.6%

Latvia

Population: **1.9 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**29**	**29**	**29**	**28**	**29**	**1.2%**

	Top two brands	2016 Vol ml
Juice	Cido	5.4
	Gutta	1.1
Nectars	Cido	8.2
	Gutta	4.8

Fruit juice (100% juice content)

Total fruit juice	10	11	11	11	11	1.2%
Branded	9	10	10	10	10	1.4%
Private label	1	1	1	1	1	-1.4%
Ambient	10	10	10	11	11	1.3%
Chilled	0	0	0	0	0	-1.7%
From concentrate	10	10	10	11	11	1.2%
Not from concentrate	0	0	0	0	0	1.0%

Nectars (25-99% juice content)

Total nectars	19	19	19	17	18	1.1%
Branded	18	17	17	16	16	1.5%
Private label	1	1	1	1	1	-4.2%

Lithuania

Population: **2.9 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**39**	**40**	**38**	**37**	**34**	**-6.3%**

	Top two brands	2016 Vol ml
Juice	Cido	4.2
	Elmenhorster	1.7
Nectars	Elmenhorster	4.9
	Cido	4.4

Fruit juice (100% juice content)

Total fruit juice	14	14	14	14	14	-4.2%
Branded	12	12	13	12	11	-8.3%
Private label	2	2	2	2	2	24.4%
Ambient	14	14	14	14	14	-4.2%
Chilled	0	0	0	0	0	-80.0%
From concentrate	14	14	14	14	13	-4.2%
Not from concentrate	0	0	0	1	0	-4.1%

Nectars (25-99% juice content)

Total nectars	25	26	24	22	21	-7.6%
Branded	22	23	21	20	18	-10.2%
Private label	3	3	3	3	3	11.9%

Luxembourg

Population: **0.6 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**10.7**	**10.6**	**10.5**	**9.9**	**9.0**	**-9.4%**

	Top two brands	2016 Vol ml
Juice	N/A	N/A
	N/A	N/A
Nectars	N/A	N/A
	N/A	N/A

Fruit juice (100% juice content)

Total fruit juice	8.7	8.6	8.5	8.1	7.4	-8.7%
Branded	3.9	3.8	3.7	3.6	3.3	-7.4%
Private label	4.8	4.8	4.8	4.5	4.0	-9.8%
Ambient	7.7	7.6	7.4	6.9	6.3	-8.9%
Chilled	1.0	1.0	1.1	1.1	1.1	-5.7%
From concentrate	4.8	4.8	4.6	4.3	3.9	-9.8%
Not from concentrate	3.9	3.9	3.9	3.9	3.5	-9.5%

Nectars (25-99% juice content)

Total nectars	2.0	1.9	1.9	1.9	1.6	-12.3%
Branded	1.0	1.0	1.0	1.0	0.9	-8.2%
Private label	1.0	1.0	0.9	0.9	0.7	-16.7%

Malta

Population: **0.4 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**12.2**	**12.5**	**12.5**	**12.8**	**13.0**	**2.0%**

	Top two brands	2016 Vol ml
Juice	N/A	N/A
	N/A	N/A
Nectars	N/A	N/A
	N/A	N/A

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	5.7	5.7	5.6	5.7	5.8	1.8%
Branded	5.0	5.1	4.9	5.0	5.1	2.0%
Private label	0.7	0.6	0.7	0.7	0.7	0.4%
Ambient	5.3	5.3	5.1	5.2	5.3	1.8%
Chilled	0.4	0.4	0.4	0.4	0.4	1.2%
From concentrate	5.7	5.7	5.6	5.7	5.8	1.8%
Not from concentrate	0.0	0.0	0.0	0.0	0.0	0.0%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	6.5	6.8	7.0	7.1	7.3	2.1%
Branded	5.6	5.7	5.8	5.9	6.1	2.2%
Private label	0.9	1.0	1.1	1.2	1.2	1.7%

Norway

Population: **5.3 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**154**	**150**	**146**	**142**	**136**	**-3.9%**

	Top two brands	2016 Vol ml
Juice	Sunniva	36.9
	Coop (PL)	21.5
Nectars	Eldorado (PL)	4.6
	Nen	1.0

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	141	138	135	131	126	-4.0%
Branded	71	67	69	68	63	-6.5%
Private label	69	71	66	64	63	-1.3%
Ambient	78	72	64	60	58	-3.5%
Chilled	63	66	71	71	68	-4.4%
From concentrate	116	108	97	95	90	-4.9%
Not from concentrate	25	30	38	36	36	-1.6%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	13	12	11	11	10	-3.0%
Branded	4	4	4	3	4	5.8%
Private label	9	8	8	7	7	-7.2%

Portugal

Population: **10.3 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**111**	**114**	**114**	**119**	**125**	**4.8%**

	Top two brands	2016 Vol ml
Juice	Compal	4.4
	Um Bongo	1.1
Nectars	Compal	66.8
	Um Bongo	11.2

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	23	20	19	16	15	-7.6%
Branded	8	8	8	8	8	11.3%
Private label	14	12	12	9	7	-23.9%
Ambient	21	18	18	14	13	-9.2%
Chilled	2	2	2	2	2	3.6%
From concentrate	21	18	18	14	13	-9.2%
Not from concentrate	2	2	2	2	2	3.6%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	88	93	95	103	110	6.8%
Branded	61	66	69	78	84	8.0%
Private label	27	28	26	25	26	3.0%

Rep. of Ireland

Population: **4.7 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**53**	**50**	**45**	**41**	**38**	**-7.4%**

	Top two brands	2016 Vol ml
Juice	Tropicana	7.4
	Innocent	4.5
Nectars	Ocean Spray	2.4
	Trop50	0.6

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	47	44	39	36	33	-7.7%
Branded	27	26	21	23	21	-9.3%
Private label	21	19	18	13	12	-4.8%
Ambient	27	25	21	16	15	-1.9%
Chilled	20	20	18	20	18	-12.1%
From concentrate	33	31	27	20	18	-10.4%
Not from concentrate	14	13	12	15	15	-4.0%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	6	6	6	6	5	-5.7%
Branded	5	5	5	5	4	-13.0%
Private label	1	1	1	0	1	77.8%

Romania

Population: **19.7 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**56**	**54**	**54**	**58**	**61**	**4.8%**

	Top two brands	2016 Vol ml
Juice	Santal	2.6
	Tymbark	2.4
Nectars	Tedi	5.6
	Santal	4.4

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	21	21	20	22	24	7.2%
Branded	4	6	5	6	7	17.8%
Private label	16	15	15	16	16	3.3%
Ambient	21	21	20	22	23	6.0%
Chilled	0	0	0	0	0	178.1%
From concentrate	20	19	18	19	19	1.0%
Not from concentrate	1	1	2	3	4	45.1%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	35	33	34	36	37	3.4%
Branded	27	26	26	28	29	5.9%
Private label	8	7	8	8	8	-4.8%

Slovak Republic

Population: **5.4 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**36**	**34**	**38**	**40**	**43**	**5.4%**

	Top two brands	2016 Vol ml
Juice	Relax	4.1
	Happy Day	3.7
Nectars	Relax	4.2
	Cappy	2.9

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	20	19	22	24	26	6.2%
Branded	9	7	8	9	9	0.5%
Private label	12	12	15	16	17	9.3%
Ambient	19	18	20	22	23	5.2%
Chilled	1	1	2	2	2	16.7%
From concentrate	19	18	20	22	23	5.2%
Not from concentrate	1	1	2	2	2	16.7%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	16	15	15	16	17	4.2%
Branded	11	11	11	12	13	10.6%
Private label	5	5	4	4	4	-13.5%

Slovenia

Population: **2.1 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**36**	**33**	**30**	**29**	**27**	**-6.8%**

	Top two brands	2016 Vol ml
Juice	Fructal	2.3
	Happy Day	1.3
Nectars	Fructal	5.1
	Dana	1.4

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	13	13	12	13	12	-5.5%
Branded	6	5	5	6	6	-0.9%
Private label	8	8	7	7	6	-9.3%
Ambient	13	13	12	13	12	-5.5%
Chilled	N/A	N/A	N/A	N/A	N/A	N/A
From concentrate	13	13	12	13	12	-5.5%
Not from concentrate	N/A	N/A	N/A	N/A	N/A	N/A

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	23	20	17	16	15	-7.9%
Branded	13	11	10	10	9	-7.1%
Private label	10	8	7	7	6	-9.2%

Switzerland

Population: **8.4 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**197**	**196**	**194**	**192**	**187**	**-2.7%**

	Top two brands	2016 Vol ml
Juice	Migros (PL)	33.7
	Ramseier	26.1
Nectars	Migros (PL)	13.3
	Coop (PL)	5.7

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	150	150	148	146	142	-2.8%
Branded	79	78	77	76	71	-5.4%
Private label	72	72	70	71	71	0.0%
Ambient	134	133	130	128	124	-3.6%
Chilled	16	17	17	18	19	3.2%
From concentrate	133	131	129	126	122	-3.7%
Not from concentrate	18	19	19	20	21	2.9%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	47	46	46	46	45	-2.5%
Branded	15	14	14	17	17	5.4%
Private label	32	32	32	29	27	-7.0%

Turkey

Population: **78.6 million**

Total fruit juice and nectars

Volume, million litres*	2012	2013	2014	2015	2016	15-16 Gr%
Total	**632**	**658**	**705**	**690**	**680**	**-1.5%**

	Top two brands	2016 Vol ml
Juice	Cappy	22.9
	Dimes	9.7
Nectars	Cappy	146.0
	Dimes	79.8

Fruit juice (100% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total fruit juice	51	51	52	52	62	19.1%
Branded	47	46	48	47	57	20.8%
Private label	5	4	5	5	5	2.6%
Ambient	47	46	47	46	56	20.7%
Chilled	4	5	5	6	6	6.3%
From concentrate	42	42	43	41	50	22.0%
Not from concentrate	9	9	10	11	12	8.2%

Nectars (25-99% juice content)

	2012	2013	2014	2015	2016	15-16 Gr%
Total nectars	581	607	652	638	618	-3.2%
Branded	505	528	570	553	526	-4.8%
Private label	76	79	82	85	92	7.5%

AIJN Report Methodology

Within the beverage industry GlobalData is recognised as the beverage information specialist and has been commissioned to produce the 2017 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 Tracker 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.

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Definitions

Fruit juice and Nectars

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 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) need to be added for the purposes of production. Permitted minerals and vitamins for the purpose of fortification and permitted additives may be added.

Whilst juice content is required to be equal to or in excess of 25% by volume, minimum juice content varies according to the fruit in question. 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, gingko, ginseng).

Both chilled and ambient products can be found. Includes packaged products and products made to order in on-premise outlets. Categorised under the juice and nectars categories, depending on juice content and/or ingredients. Includes smoothies containing less than 50% dairy only.

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.

Chilled juiceRelates 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 0-24.9%. Sugar, artificial flavouring and colouring may be added.

FJN: Fruit juice and nectars

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
FJN: Fruit juice and nectars

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**, Marjan Skotnicki-Hoogland, Managing Director, FrieslandCampina Riedel B.V., Netherlands

Members:

Thomas Mertens, Managing Director Supply Chain, Wesergold Getränkeindustrie GmbH & Co. KG, Germany; Piotr Podoba, CEO, Döhler Sp. z o.o., Poland; Bruno Van Gompel, Technical Director, Coca-Cola Western Europe, Belgium; 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: AJUNEC
Bulgaria: Bulgarian Soft Drinks Association (BSDA)
Cyprus: 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: ASOZUMOS
Sweden: Swedish Juice Association
UK: British Soft Drinks Association Ltd
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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