AIJN

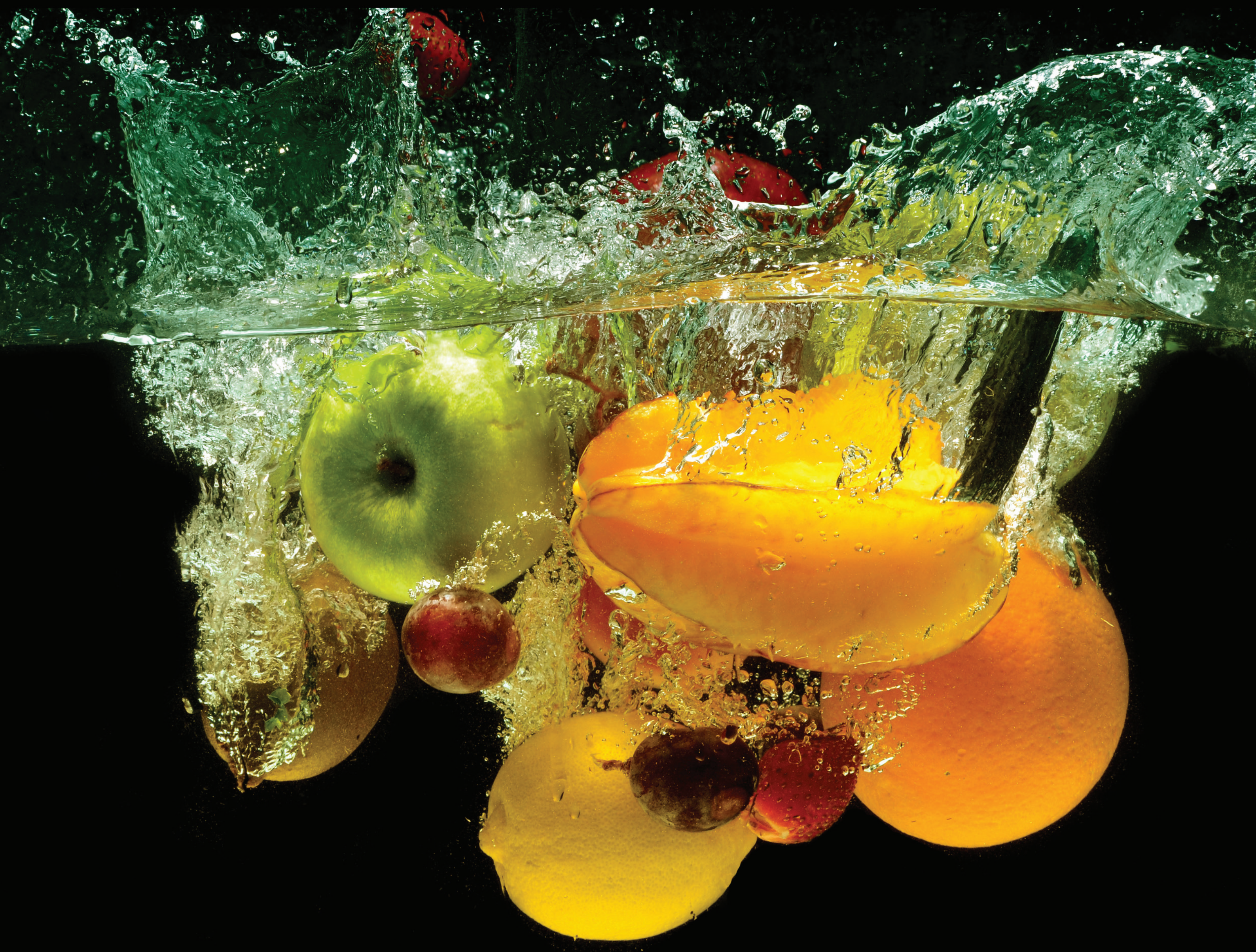
European Fruit Juice Association

2013

Liquid Fruit

MARKET REPORT

JUICE SUMMIT2013
powered by AIJN with IFU, SGF, EQCS
1–2 October 2013
www.juicesummit.org/2013



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Introduction from the President

AIJN President Andrew Biles

> Nature and ingenuity continue to provide an abundance of opportunities for juice.

Hello to all our friends with an interest in our European Juice industry. This interim 2013 Market Update contains the latest key market statistics prior to our next bi-annual Market Report due in 2014. Our aim remains straightforward--to offer insight and an overview of our industry to European and National legislators, non-governmental organisations and all fellow stakeholders in the food and drinks industry --wherever you are in the world. Welcome to all of you.

To cut a long story short the average EU consumer who is our main customer continues to have a tough time. The economic woes of Europe are well chronicled and recovery seems rather remote despite political rhetoric. Yes, consumption of juice is challenged and our industry needs to turn this trend around. As a successful ice-cream executive once said to his sales force: "I will not accept bad weather as an excuse for bad sales". He is still in business so take note. So, no excuses, we have good products to market!!

So what is actually going on? In 2012 consumption of fruit juice and nectars dipped about 3.4% compared to 2011 but still remains a healthy 11.4 billion litres in the EU. However this follows a dip of 2.1% in 2011. Per capita consumption is about 21 litres in the EU compared to 27 litres in North America, 5 litres in South America and only 2 litres in Asia Pacific. For reference our 21 litres per year in the EU is less than 2 litres per month--far below from the 200ml per day (which adds up to 6 litres per month) that can be counted as one of the 5-a-Day portions of fruits and vegetables recommended for a healthier nutrition!

Closer analysis of the numbers reveals that NFC is growing as well as chilled juices. Anecdotal evidence also indicates that major Brands see the opportunity in juice, and also single serve products are in favour for those 'on the go', to name only two observations. Nature and ingenuity continue to provide an abundance of opportunities for juice. The future of our industry lies not in the past but is in front of us: today and tomorrow. Over to us all to ensure our consumer makes good informed choices about the products we offer.

What is your European Juice Association doing? Apart from providing daily support to our members we continue to act on all fronts. We have started the process of setting up a Fruit Juice Corporate Social Responsibility Platform together with the EU Commission. This Platform's main goal will be to disseminate good practice amongst all juice stakeholders and give greater visibility to CSR activities of enterprises thus increasing our responsibility and sustainability image of the sector. We continue to co-sponsor research into health claims on citrus juices. Progress is being made with the help of the Florida Department of Citrus and CitrusBR. We carry on the work on fair reduction of import duties with key success so far with Tropical concentrates and purees—some millions of Euros saved for the industry. The time of abundant cheap raw materials is over so this work is ever more important. In addition we are responding to many initiatives on proposed food legislation relevant to our members.

Finally, we have decided to hold our own JUICE SUMMIT this year on October 1 and 2 in Brussels. Powered not just by the European Fruit juice Association but in association with the SGF, EQCS and IFU it will assemble worldwide suppliers, bottlers and customers in the juice industry at both senior and junior levels. This is an important SUMMIT for the industry, by the industry and for the sole benefit of the industry. Be sure to put this in your diary **www.juicesummit.org/2013**. We expect and look forward to see you all there. Have a good summer.

AIJN President Andrew Biles, June 2013
CEO Gerber Emig Group Ltd, UK

The fruit juice industry: overall fruit juice consumption

EU: Total fruit juice and nectars — Population: 504.4 million

Volume, million litres*		2008	2009	2010	2011	2012	% change
Total		**11,346**	**11,199**	**11,041**	**10,737**	**10,387**	**-3.3%**
	Private label	**4,638**	**4,865**	**4,782**	**4,640**	**4,517**	**-2.6%**
	Branded	**6,709**	**6,335**	**6,259**	**6,097**	**5,869**	**-3.7%**

Fruit juice (100% juice content)

Total fruit juice		7,237	7,218	7,180	7,007	6,768	-3.4%
	Private label	3,217	3,349	3,328	3,226	3,088	-4.3%
	Branded	4,020	3,869	3,852	3,781	3,680	-2.7%
Chilled		1,283	1,288	1,321	1,356	1,394	2.8%
Ambient		5,954	5,931	5,859	5,651	5,374	-4.9%
From concentrate		5,739	5,660	5,581	5,295	5,001	-5.6%
Not from concentrate		1,498	1,558	1,599	1,712	1,767	3.2%

Nectars (25-99% juice content)

Total nectars		4110	3981	3860	3730	3618	-3.0%
	Private label	1,421	1,516	1,453	1,414	1,429	1.1%
	Branded	2,689	2,465	2,407	2,316	2,189	-5.5%

Largest EU FJN market by volume consumption, 2012

Country	Million litres
Germany	2,607
France	1,681
United Kingdom	1,329
Spain	1,046
Italy	774
Others	2,950
Total	10,387

Largest EU FJN market by per capita consumption, 2012

Country	Population (million)	Litres per person
Germany	81.3	32.1
Finland	5.3	29.5
Netherlands	16.7	29.3
Austria	8.4	27.0
Sweden	9.1	26.7

Largest FJN markets by volume consumption by region, 2012

Region	Million litres
West Europe	9,526
North America	9,475
Asia Pacific	7,030
East Europe	5,173
Latin America	3,255
Africa & Mid East	2,142
Total	36,601
EU 27	10,387

Largest FJN markets by per capita consumption by region, 2012

Country	Population (million)	Litres per person
North America	348.1	27.2
West Europe	412.8	23.1
EU 27	504.1	20.6
East Europe	391.5	13.2
Latin America	598.0	5.4
Africa & Mid East	755.7	2.8
Asia Pacific	3,536.4	2.0

Austria

Population: **8.4 million**

Total fruit juice and nectars

Volume, million litres*		2008	2009	2010	2011	2012	% change
Total		253	250	243	233	228	-2.3%

Fruit juice (100% juice content)

		2008	2009	2010	2011	2012	% change
Total fruit juice		162	162	161	156	153	-2.3%
	Branded	91	94	88	86	85	-1.9%
	Private label	71	68	73	70	68	-2.8%
Ambient		145	145	144	140	137	-2.1%
	Branded	81	83	78	77	76	-1.5%
	Private label	64	61	66	63	61	-2.8%
From concentrate		145	145	141	137	134	-2.1%
	Branded	81	83	75	74	73	-1.5%
	Private label	64	61	66	63	61	-2.8%
Not from concentrate		0	0	3	3	3	-1.1%
	Branded	0	0	3	3	3	-1.1%
Chilled		17	17	17	17	16	-3.6%
	Branded	9	10	10	9	9	-4.7%
	Private label	7	7	7	7	7	-2.2%
Not from concentrate		17	17	17	17	16	-3.6%
	Branded	9	10	10	9	9	-4.7%
	Private label	7	7	7	7	7	-2.2%
of which are smoothies		2	2	2	3	3	-0.8%
	Branded	2	2	2	3	3	-0.8%

Nectars (25-99% juice content)

		2008	2009	2010	2011	2012	% change
Total nectars		91	89	82	77	75	-2.4%
	Branded	60	56	49	45	44	-2.5%
	Private label	31	32	33	32	31	-2.2%
Ambient		91	89	82	77	75	-2.4%
	Branded	60	56	49	45	44	-2.5%
	Private label	31	32	33	32	31	-2.2%
From concentrate		91	89	82	77	75	-2.4%
	Branded	60	56	49	45	44	-2.5%
	Private label	31	32	33	32	31	-2.2%

Belgium

Population: **10.4 million**

Total fruit juice and nectars

Volume, million litres*		2008	2009	2010	2011	2012	% change
Total		230	228	222	220	211	-4.2%

Fruit juice (100% juice content)

		2008	2009	2010	2011	2012	% change
Total fruit juice		192	191	186	185	176	-4.8%
	Branded	87	81	75	73	66	-8.7%
	Private label	105	111	111	112	110	-2.3%
Ambient		176	175	170	169	160	-5.1%
	Branded	75	69	64	61	55	-9.8%
	Private label	101	106	106	108	105	-2.4%
From concentrate		176	175	170	169	160	-5.1%
	Branded	75	69	64	61	55	-9.9%
	Private label	101	106	106	108	105	-2.4%
Not from concentrate		0	0	0	0	0	0.0%
	Branded	0	0	0	0	0	0.0%
Chilled		16	16	16	16	16	-1.9%
	Branded	12	12	12	12	11	-2.6%
	Private label	4	5	5	5	5	0.0%
Not from concentrate		16	16	16	16	16	-1.9%
	Branded	12	12	12	12	11	-2.6%
	Private label	4	5	5	5	5	0.0%
of which are smoothies		0	0	0	0	0	0.0%
	Branded	0	0	0	0	0	0.0%

Nectars (25-99% juice content)

		2008	2009	2010	2011	2012	% change
Total nectars		38	37	36	35	35	-0.9%
	Branded	26	24	23	22	22	-1.8%
	Private label	12	13	13	13	13	0.8%
Ambient		36	35	34	34	34	-0.9%
	Branded	24	23	21	21	21	-1.9%
	Private label	12	13	13	13	13	0.8%
From concentrate		36	35	34	34	34	-0.9%
	Branded	24	23	21	21	21	-1.9%
	Private label	12	13	13	13	13	0.8%
Chilled		2	2	1	1	1	0.0%
	Branded	2	2	1	1	1	0.0%
From concentrate		2	2	1	1	1	0.0%
	Branded	2	2	1	1	1	0.0%
of which are smoothies		1	1	0	1	1	0.0%
	Branded	1	1	0	1	1	0.0%

France

Population: **65.6 million**

Total fruit juice and nectars						
Volume, million litres*	**2008**	**2009**	**2010**	**2011**	**2012**	**% change**
Total	**1,631**	**1,667**	**1,693**	**1,713**	**1,681**	**-1.4%**

Fruit juice (100% juice content)

	2008	2009	2010	2011	2012	% change
Total fruit juice	1,235	1,270	1,298	1,328	1,314	-0.7%
Branded	570	563	577	592	583	-1.3%
Private label	665	707	721	736	731	-0.3%
Ambient	1,104	1,141	1,164	1,181	1,152	-1.6%
Branded	472	466	480	490	471	-2.7%
Private label	632	675	685	691	682	-0.7%
From concentrate	651	620	603	573	544	-5.0%
Branded	185	190	187	176	160	-9.3%
Private label	466	431	417	397	385	-3.0%
Not from concentrate	453	521	561	608	608	-0.0%
Branded	287	277	293	314	311	-0.8%
Private label	166	244	268	294	297	0.9%
of which are smoothies	1	0	0	0	0	1.1%
Branded	1	0	0	0	0	1.1%
Chilled	131	129	134	147	161	9.7%
Branded	98	96	97	102	112	10.0%
Private label	33	33	37	45	49	8.9%
Not from concentrate	131	129	134	147	161	9.7%
Branded	98	96	97	102	112	10.0%
Private label	33	33	37	45	49	8.9%
of which are smoothies	11	12	14	15	15	0.6%
Branded	7	8	9	9	8	-5.6%
Private label	4	4	5	6	7	9.4%

Nectars (25-99% juice content)

	2008	2009	2010	2011	2012	% change
Total nectars	396	397	395	385	367	-4.8%
Branded	112	101	107	106	98	-7.4%
Private label	284	296	288	279	268	-3.8%
Ambient	378	379	376	367	346	-5.7%
Branded	96	84	89	90	79	-11.5%
Private label	283	295	287	277	267	-3.9%
From concentrate	378	379	376	367	346	-5.7%
Branded	96	84	89	90	79	-11.5%
Private label	283	295	287	277	267	-3.9%
of which are smoothies	4	4	4	3	5	51.0%
Branded	1	0	1	0	2	449.5%
Private label	3	3	3	3	3	-3.4%
Chilled	18	18	19	18	21	13.0%
Branded	16	17	18	17	19	14.7%
Private label	1	2	2	2	2	4.7%
From concentrate	18	18	19	18	21	12.8%
Branded	16	17	18	17	19	14.4%
Private label	1	2	2	2	2	4.6%
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%

Germany

Population: **81.3 million**

Total fruit juice and nectars						
Volume, million litres*	**2008**	**2009**	**2010**	**2011**	**2012**	**% change**
Total	**2,904**	**2,865**	**2,810**	**2,733**	**2,607**	**-4.6%**

Fruit juice (100% juice content)

	2008	2009	2010	2011	2012	% change
Total fruit juice	1,960	1,944	1,915	1,900	1,824	-4.0%
Branded	1,003	989	978	964	935	-3.0%
Private label	957	955	937	935	889	-5.0%
Ambient	1,890	1,878	1,858	1,844	1,757	-4.7%
Branded	948	931	928	915	874	-4.5%
Private label	943	947	930	929	883	-4.9%
From concentrate	1,634	1,633	1,643	1,622	1,533	-5.5%
Branded	882	876	893	873	824	-5.7%
Private label	752	758	750	748	709	-5.2%
Not from concentrate	256	245	215	222	224	0.9%
Branded	65	56	35	41	50	21.0%
Private label	191	189	181	180	174	-3.7%
of which are smoothies	1	0	0	0	0	0.0%
Branded	1	0	0	0	0	0.0%
Chilled	70	66	57	56	67	19.3%
Branded	56	58	50	49	61	23.1%
Private label	14	8	7	7	6	-8.3%
From concentrate	20	28	34	33	39	19.6%
Branded	20	28	34	33	39	19.6%
Not from concentrate	50	38	23	23	28	19.0%
Branded	36	29	17	16	21	30.1%
Private label	14	8	7	7	6	-8.3%
of which are smoothies	19	13	10	10	10	-6.0%
Branded	5	4	4	4	3	-1.4%
Private label	14	8	7	7	6	-8.3%

Nectars (25-99% juice content)

	2008	2009	2010	2011	2012	% change
Total nectars	944	921	895	833	783	-6.0%
Branded	479	468	497	485	437	-9.9%
Private label	464	452	398	348	347	-0.5%
Ambient	935	914	889	828	778	-6.0%
Branded	470	461	491	480	432	-10.1%
Private label	464	452	398	348	347	-0.5%
From concentrate	935	914	885	821	769	-6.3%
Branded	470	461	486	473	423	-10.6%
Private label	464	452	398	348	347	-0.5%
Not from concentrate	0	0	5	7	9	23.6%
Branded	0	0	5	7	9	23.6%
Chilled	9	7	6	5	5	-1.8%
Branded	9	7	6	5	5	-1.8%
From concentrate	9	7	6	5	5	-1.8%
Branded	9	7	6	5	5	-1.8%
of which are smoothies	7	6	5	4	4	-2.4%
Branded	7	6	5	4	4	-2.4%

Italy

Population: **61.3 million**

Total fruit juice and nectars

Volume, million litres*		2008	2009	2010	2011	2012	% change
Total		**844**	**836**	**807**	**808**	**774**	**-4.2%**

Fruit juice (100% juice content)

		2008	2009	2010	2011	2012	% change
Total fruit juice		175	174	172	165	155	-6.5%
	Branded	125	125	118	112	102	-8.8%
	Private label	50	49	54	53	52	-1.6%
Ambient		161	158	154	148	139	-6.3%
	Branded	116	114	106	102	93	-8.2%
	Private label	45	44	48	46	45	-2.0%
From concentrate		161	158	154	148	139	-6.3%
	Branded	116	114	106	102	93	-8.2%
	Private label	45	44	48	46	45	-2.0%
of which are smoothies		0	0	2	1	1	-29.1%
	Branded	0	0	2	1	1	-29.1%
Chilled		13	17	18	17	16	-8.4%
	Branded	9	11	11	11	9	-14.6%
	Private label	5	6	7	7	7	1.2%
From concentrate		0	1	1	2	4	113.7%
	Branded	0	1	1	2	4	113.7%
Not from concentrate		13	16	17	15	12	-23.9%
	Branded	8	10	10	9	5	-43.6%
	Private label	5	6	7	7	7	1.2%
of which are smoothies		0	3	4	3	2	-35.4%
	Branded	0	3	4	3	2	-35.4%

Nectars (25-99% juice content)

		2008	2009	2010	2011	2012	% change
Total nectars		669	662	635	643	620	-3.6%
	Branded	516	502	474	472	441	-6.4%
	Private label	153	160	161	171	178	4.1%
Ambient		669	662	635	643	620	-3.6%
	Branded	516	502	474	472	441	-6.4%
	Private label	153	160	161	171	178	4.1%
From concentrate		669	662	635	643	620	-3.6%
	Branded	516	502	474	472	441	-6.4%
	Private label	153	160	161	171	178	4.1%

Netherlands

Population: **16.7 million**

Total fruit juice and nectars

Volume, million litres*		2008	2009	2010	2011	2012	% change
Total		**455**	**460**	**466**	**474**	**490**	**3.0%**

Fruit juice (100% juice content)

		2008	2009	2010	2011	2012	% change
Total fruit juice		285	288	283	284	290	2.3%
	Branded	158	159	153	157	166	5.2%
	Private label	128	130	130	127	125	-1.3%
Ambient		226	224	217	208	204	-1.7%
	Branded	119	119	113	108	110	1.6%
	Private label	107	105	104	100	94	-5.3%
From concentrate		226	224	217	208	204	-1.7%
	Branded	119	119	113	108	110	1.6%
	Private label	107	105	104	100	94	-5.3%
Chilled		60	64	67	76	86	13.1%
	Branded	39	40	40	50	56	13.0%
	Private label	21	25	26	27	30	13.4%
From concentrate		23	24	27	31	33	6.5%
	Branded	23	24	27	31	33	6.5%
Not from concentrate		37	40	40	46	54	17.7%
	Branded	15	16	14	19	23	23.7%
	Private label	21	25	26	27	30	13.4%
of which are smoothies		0	1	2	2	2	20.0%
	Branded	0	1	2	2	2	20.0%

Nectars (25-99% juice content)

		2008	2009	2010	2011	2012	% change
Total nectars		169	172	183	190	200	3.9%
	Branded	82	75	84	89	91	0.7%
	Private label	87	97	99	101	109	7.5%
Ambient		118	125	136	142	153	7.7%
	Branded	45	41	49	52	56	7.3%
	Private label	73	84	87	90	97	8.0%
From concentrate		118	125	136	142	153	7.7%
	Branded	45	41	49	52	56	7.3%
	Private label	73	84	87	90	97	8.0%
Chilled		51	48	47	48	47	-1.9%
	Branded	38	35	36	36	35	-4.1%
	Private label	14	13	12	11	12	5.3%
From concentrate		51	48	47	48	47	-1.9%
	Branded	38	35	36	36	35	-4.1%
	Private label	14	13	12	11	12	5.3%

Poland

Population: **38.4 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	791	810	810	723	695	-4.3%

Fruit juice (100% juice content)

		2008	2009	2010	2011	2012	% change
Total fruit juice		459	484	504	462	449	-2.7%
	Branded	403	420	434	400	391	-2.1%
	Private label	56	64	70	62	58	-6.5%
Ambient		434	448	457	409	392	-4.2%
	Branded	380	388	391	351	338	-3.7%
	Private label	54	60	66	58	54	-7.1%
From concentrate		431	444	453	405	383	-5.4%
	Branded	377	384	387	347	329	-5.1%
	Private label	54	60	66	58	54	-7.1%
Not from concentrate		4	4	4	4	8	133.3%
	Branded	4	4	4	4	8	133.3%
Chilled		24	37	47	53	58	8.8%
	Branded	22	33	43	49	54	9.3%
	Private label	2	4	4	4	4	2.6%
From concentrate		0	6	9	9	10	3.3%
	Branded	0	6	9	9	10	3.3%
Not from concentrate		24	31	38	44	48	9.9%
	Branded	22	27	34	40	44	10.7%
	Private label	2	4	4	4	4	2.6%
of which are smoothies		0	4	7	7	8	4.1%
	Branded	0	4	7	7	8	4.1%

Nectars (25-99% juice content)

		2008	2009	2010	2011	2012	% change
Total nectars		332	326	306	261	246	-6.1%
	Branded	241	221	202	160	148	-7.1%
	Private label	91	105	104	101	98	-3.0%
Ambient		330	323	303	258	244	-6.1%
	Branded	239	218	199	157	146	-7.0%
	Private label	91	105	104	101	98	-3.0%
From concentrate		330	323	303	258	244	-6.1%
	Branded	239	218	199	157	146	-7.0%
	Private label	91	105	104	101	98	-3.0%
of which are smoothies		0	0	0	0	0	0.0%
	Branded	0	0	0	0	0	0.0%
Chilled		2	3	3	2	2	-20.8%
	Branded	2	3	3	2	2	-20.8%
From concentrate		2	3	3	2	2	-20.8%
	Branded	2	3	3	2	2	-20.8%

Spain

Population: **47.0 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	1,110	1,109	1,097	1,068	1,046	-2.1%

Fruit juice (100% juice content)

		2008	2009	2010	2011	2012	% change
Total fruit juice		525	529	512	481	444	-7.6%
	Branded	328	287	282	256	233	-8.9%
	Private label	197	242	229	225	211	-6.0%
Ambient		468	474	458	438	403	-8.1%
	Branded	297	260	256	239	217	-9.2%
	Private label	172	215	203	199	185	-6.8%
From concentrate		449	431	398	371	335	-9.6%
	Branded	287	242	231	211	191	-9.4%
	Private label	162	189	167	160	144	-9.8%
Not from concentrate		19	43	61	67	67	0.1%
	Branded	9	18	25	29	26	-7.5%
	Private label	10	26	36	39	41	5.7%
Chilled		57	55	53	43	42	-2.2%
	Branded	32	27	26	17	16	-5.8%
	Private label	25	28	27	26	26	0.2%
From concentrate		27	31	29	19	18	-4.1%
	Branded	7	9	9	0	1	42.5%
	Private label	19	22	20	19	18	-5.1%
Not from concentrate		30	24	24	23	23	-0.6%
	Branded	24	18	17	16	15	-7.0%
	Private label	6	6	7	7	8	14.1%

Nectars (25-99% juice content)

		2008	2009	2010	2011	2012	% change
Total nectars		585	580	585	587	601	2.4%
	Branded	427	373	384	374	372	-0.6%
	Private label	158	206	202	213	229	7.7%
Ambient		581	576	583	586	600	2.5%
	Branded	423	371	382	373	371	-0.6%
	Private label	158	205	201	212	229	7.9%
From concentrate		581	576	582	585	600	2.5%
	Branded	423	371	381	373	371	-0.5%
	Private label	158	205	201	212	229	7.9%
Not from concentrate		0	0	0	0	0	-16.1%
	Branded	0	0	0	0	0	-16.1%
Chilled		4	3	3	2	1	-37.4%
	Branded	4	2	2	1	1	-17.4%
	Private label	0	1	1	1	0	-52.8%
From concentrate		4	3	2	1	1	-37.4%
	Branded	3	2	2	1	1	-17.4%
	Private label	0	1	1	1	0	-52.8%
Not from concentrate		1	0	0	0	0	0.0%
	Branded	1	0	0	0	0	0.0%
of which are smoothies		2	2	2	1	0	-31.4%
	Branded	2	2	1	0	0	-26.8%
	Private label	0	0	0	0	0	-37.1%

Sweden

Population: **9.1 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**254**	**254**	**257**	**252**	**243**	**-3.8%**

Fruit juice (100% juice content)

	2008	2009	2010	2011	2012	% change
Total fruit juice	195	199	201	197	190	-3.8%
Branded	143	147	149	157	151	-3.8%
Private label	52	52	52	40	38	-3.6%
Ambient	75	72	72	58	55	-5.6%
Branded	34	32	31	30	28	-7.4%
Private label	41	40	41	28	27	-3.7%
From concentrate	75	71	71	58	54	-6.0%
Branded	34	31	31	29	27	-8.2%
Private label	41	40	41	28	27	-3.7%
Not from concentrate	0	0	0	1	1	33.3%
Branded	0	0	0	1	1	33.3%
of which are smoothies	0	0	0	1	1	33.3%
Branded	0	0	0	1	1	33.3%
Chilled	119	127	129	139	135	-3.0%
Branded	109	115	118	127	123	-3.0%
Private label	11	12	12	12	11	-3.4%
From concentrate	90	99	102	112	107	-3.7%
Branded	81	89	93	102	99	-3.4%
Private label	9	10	9	9	9	-7.3%
Not from concentrate	29	28	27	27	27	-0.3%
Branded	28	26	25	25	24	-1.4%
Private label	2	2	2	2	3	11.2%
of which are smoothies	2	2	2	2	2	-21.5%
Branded	1	2	2	2	1	-21.9%
Private label	0	0	0	0	0	-16.7%

Nectars (25-99% juice content)

	2008	2009	2010	2011	2012	% change
Total nectars	59	55	55	55	53	-3.8%
Branded	38	37	37	39	38	-4.3%
Private label	21	18	19	16	15	-2.2%
Ambient	43	39	38	35	35	-1.6%
Branded	22	20	19	19	19	-1.0%
Private label	21	18	19	16	15	-2.2%
From concentrate	43	39	38	35	35	-1.6%
Branded	22	20	19	19	19	-1.0%
Private label	21	18	19	16	15	-2.2%
of which are smoothies	0	0	0	0	0	0.0%
Branded	0	0	0	0	0	6.1%
Private label	0	0	0	0	0	-0.4%
Chilled	16	16	17	20	19	-5.8%
Branded	16	16	17	20	19	-5.8%
From concentrate	16	16	17	20	19	-5.8%
Branded	16	16	17	20	19	-5.8%

UK

Population: **63.0 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**1,455**	**1,410**	**1,405**	**1,369**	**1,329**	**-2.9%**

Fruit juice (100% juice content)

	2008	2009	2010	2011	2012	% change
Total fruit juice	1,246	1,212	1,212	1,180	1,144	-3.0%
Branded	518	464	482	509	519	1.9%
Private label	728	748	730	670	625	-6.7%
Ambient	598	578	551	503	458	-9.1%
Branded	192	166	164	158	143	-9.2%
Private label	406	412	386	346	314	-9.1%
From Concentrate	598	578	551	503	458	-9.1%
Branded	192	166	164	158	143	-9.2%
Private label	406	412	386	346	314	-9.1%
Chilled	648	634	661	676	687	1.5%
Branded	326	297	317	352	376	6.8%
Private label	322	337	344	325	311	-4.2%
From concentrate	274	272	285	269	258	-4.1%
Branded	26	21	20	20	18	-8.1%
Private label	249	251	264	249	240	-3.8%
Not from concentrate	374	361	377	407	429	5.3%
Branded	300	276	297	331	357	7.7%
Private label	74	85	80	76	71	-5.5%
of which are smoothies	62	56	59	67	58	-14.16%
Branded	56	50	53	61	52	-14.6%
Private label	5	6	6	6	5	-10.1%

Nectars (25-99% juice content)

	2008	2009	2010	2011	2012	% change
Total nectars	209	198	193	189	185	-2.5%
Branded	196	180	175	169	163	-3.8%
Private label	13	18	18	20	22	8.2%
Ambient	161	150	149	149	146	-2.0%
Branded	159	149	146	145	140	-3.5%
Private label	1	1	3	4	6	53.7%
From concentrate	161	150	146	146	143	-2.0%
Branded	159	149	144	142	137	-3.5%
Private label	1	1	3	4	6	53.7%
Not from concentrate	0	0	2	2	2	-3.2%
Branded	0	0	2	2	2	-3.2%
of which are smoothies	0	0	0	0	0	0.0%
Branded	0	0	0	0	0	0.0%
Chilled	49	48	44	41	39	-4.6%
Branded	37	31	29	25	23	-5.7%
Private label	12	16	15	16	16	-2.9%
From concentrate	49	48	44	41	38	-7.5%
Branded	37	31	29	25	22	-10.6%
Private label	12	16	15	16	16	-2.9%
Not from concentrate	0	0	0	0	1	0.0%
Branded	0	0	0	0	1	0.0%
of which are smoothies	18	18	16	16	16	-1.3%
Branded	13	11	10	10	10	-0.1%
Private label	5	7	7	7	7	-2.9%

Bulgaria

Population: **7.0 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**106**	**89**	**72**	**68**	**67**	**-1.9%**

Fruit juice (100% juice content)

	2008	2009	2010	2011	2012	% change
Total fruit juice	23	20	18	16	16	-1.0%
Private Label	0	0	1	1	2	17.9%
Branded	23	20	16	15	14	-2.8%
Ambient	23	20	17	16	16	-2.2%
Chilled	0	0	0	0	0	133.8%
From concentrate	23	20	17	16	15	-3.3%
Not from concentrate	0	0	1	1	1	64.4%

Nectars (25-99% juice content)

	2008	2009	2010	2011	2012	% change
Total nectars	83	69	55	52	51	-2.2%
Branded	77	61	47	44	43	-2.5%
Private label	5	8	8	8	8	-1.1%

Cyprus

Population: **1.1 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**32**	**32**	**32**	**31**	**31**	**0.3%**

Fruit juice (100% juice content)

	2008	2009	2010	2011	2012	% change
Total fruit juice	21	22	21	20	20	1.0%
Private Label	21	22	21	20	20	1.0%
Branded	0	0	0	0	0	0.0%
Ambient	20	21	21	19	19	1.0%
Chilled	1	1	1	1	1	1.4%
From concentrate	21	22	21	20	20	1.0%
Not from concentrate	0	0	0	0	0	0.0%

Nectars (25-99% juice content)

	2008	2009	2010	2011	2012	% change
Total nectars	11	11	11	11	11	-0.9%
Branded	11	11	11	11	11	-0.9%
Private label	0	0	0	0	0	0.0%

Czech Republic

Population: **10.2 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**113**	**107**	**105**	**88**	**82**	**-5.8%**

Fruit juice (100% juice content)

	2008	2009	2010	2011	2012	% change
Total fruit juice	69	70	70	54	49	-10.4%
Private Label	30	34	34	22	17	-23.9%
Branded	39	36	36	32	32	-0.9%
Ambient	69	70	70	54	48	-11.1%
Chilled	0	0	0	0	1	200.0%
From concentrate	69	69	70	54	48	-11.2%
Not from concentrate	0	1	1	0	1	100.0%

Nectars (25-99% juice content)

	2008	2009	2010	2011	2012	% change
Total nectars	43	37	34	33	34	1.5%
Branded	32	26	23	20	22	11.5%
Private label	12	11	11	13	12	-13.4%

Denmark

Population: **5.5 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**125**	**122**	**119**	**114**	**111**	**-2.0%**

Fruit juice (100% juice content)

	2008	2009	2010	2011	2012	% change
Total fruit juice	124	121	119	113	111	-2.1%
Branded	59	59	59	54	57	5.7%
Private Label	65	62	60	59	53	-9.3%
Ambient	109	107	106	101	100	-1.3%
Chilled	14	14	12	12	11	-9.1%
From concentrate	117	114	113	108	105	-2.5%
Not from concentrate	7	7	6	5	5	6.5%

Nectars (25-99% juice content)

	2008	2009	2010	2011	2012	% change
Total nectars	1	1	1	1	1	17.8%
Branded	1	1	1	1	1	38.1%
Private label	0	0	0	0	0	-23.1%

Estonia

Population: **1.3 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**37**	**34**	**32**	**29**	**27**	**-7.5%**

Fruit juice (100% juice content)

	2008	2009	2010	2011	2012	% change
Total fruit juice	15	14	14	12	12	-4.0%
Branded	12	10	11	10	10	-1.1%
Private Label	3	4	4	3	2	-14.8%
Ambient	14	14	13	12	11	-4.4%
Chilled	1	1	1	1	1	4.7%
From concentrate	15	14	13	12	11	-4.7%
Not from concentrate	0	0	1	1	1	6.9%

Nectars (25-99% juice content)

	2008	2009	2010	2011	2012	% change
Total nectars	22	19	18	17	15	-8.8%
Branded	19	17	16	16	15	-5.6%
Private label	3	2	2	1	0	-84.2%

Finland

Population: **5.3 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**171**	**167**	**166**	**164**	**155**	**-5.2%**

Fruit juice (100% juice content)

	2008	2009	2010	2011	2012	% change
Total fruit juice	151	147	145	144	135	-6.0%
Branded	131	128	128	127	119	-6.33%
Private Label	20	19	18	17	16	-3.0%
Ambient	102	97	95	93	84	-10.3%
Chilled	49	49	50	50	52	2.0%
From concentrate	138	133	132	130	123	-5.4%
Not from concentrate	13	14	14	14	12	-11.0%

Nectars (25-99% juice content)

	2008	2009	2010	2011	2012	% change
Total nectars	20	21	20	20	20	0.4%
Branded	20	21	20	20	20	-0.7%
Private label	0	0	0	0	0	0.0%

Greece

Population: **10.8 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**204**	**200**	**179**	**168**	**150**	**-12.4%**

Fruit juice (100% juice content)

Total fruit juice	142	139	123	107	93	-15.3%
Branded	125	121	105	90	75	-18.4%
Private Label	17	18	17	17	18	6.1%
Ambient	103	101	88	79	71	-10.9%
Chilled	39	38	35	28	22	-21.5%
From concentrate	142	139	122	107	93	-15.3%
Not from concentrate	0	1	0	0	0	0.0%

Nectars (25-99% juice content)

Total nectars	61	61	57	60	57	-6.1%
Branded	43	42	36	40	37	-6.3%
Private label	19	19	20	21	20	-5.6%

Hungary

Population: **10.0 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**127**	**110**	**107**	**102**	**95**	**-6.2%**

Fruit juice (100% juice content)

Total fruit juice	48	41	43	40	37	-6.8%
Branded	9	14	17	15	13	-8.7%
Private Label	39	28	25	25	24	-5.7%
Ambient	47	41	42	40	37	-6.8%
Chilled	0	0	0	0	0	0.0%
From concentrate	44	41	41	38	36	-7.5%
Not from concentrate	0	0	0	0	0	0.0%

Nectars (25-99% juice content)

Total nectars	80	68	64	61	58	-5.8%
Branded	64	47	45	41	36	-13.6%
Private label	16	21	19	20	22	10.3%

Ireland

Population: **4.7 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**69**	**65**	**58**	**52**	**48**	**-7.2%**

Fruit juice (100% juice content)

Total fruit juice	61	58	52	45	42	-7.61%
Branded	39	32	29	29	26	-7.3%
Private Label	22	26	23	17	15	-8.1%
Ambient	41	39	33	26	22	-14.1%
Chilled	20	19	19	19	20	1.1%
From concentrate	48	46	40	33	28	-12.6%
Not from concentrate	13	12	11	13	13	5.0%

Nectars (25-99% juice content)

Total nectars	8	7	7	6	6	-4.2%
Branded	7	6	6	6	5	-5.6%
Private label	0	1	1	1	1	9.6%

Latvia

Population: **2.2 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**43**	**31**	**28**	**29**	**29**	**0.7%**

Fruit juice (100% juice content)

Total fruit juice	16	12	11	10	10	4.5%
Branded	15	11	10	9	9	6.4%
Private Label	2	1	1	1	1	-14.4%
Ambient	16	12	11	9	10	4.2%
Chilled	1	0	0	0	0	14.5%
From concentrate	16	11	11	9	10	4.9%
Not from concentrate	1	0	0	0	0	-17.3%

Nectars (25-99% juice content)

Total nectars	27	19	17	19	19	-1.2%
Branded	24	17	15	18	18	0.0%
Private label	3	2	2	2	1	-13.5%

Lithuania

Population: **3.5 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**57**	**44**	**41**	**40**	**39**	**-1.9%**

Fruit juice (100% juice content)

Total fruit juice	22	16	16	14	14	-3.2%
Branded	19	14	14	12	12	0.1%
Private Label	3	3	3	2	2	-21.6%
Ambient	22	16	16	14	14	-3.2%
Chilled	0	0	0	0	0	0.0%
From concentrate	22	16	16	14	14	-3.1%
Not from concentrate	0	0	0	0	0	-5.0%

Nectars (25-99% juice content)

Total nectars	34	28	25	25	25	-1.2%
Branded	31	25	23	23	22	-3.2%
Private label	4	3	2	2	3	18.3%

Luxembourg

Population: **0.5 million**

Total fruit juice and nectars

Volume, million litres*	2008	2009	2010	2011	2012	% change
Total	**11**	**11**	**11**	**11**	**11**	**0.1%**

Fruit juice (100% juice content)

Total fruit juice	9	9	9	9	9	0.0%
Branded	4	4	4	4	4	0.0%
Private Label	5	5	5	5	5	0.1%
Ambient	8	8	8	8	8	0.0%
Chilled	1	1	1	1	1	1.5%
From concentrate	5	5	5	5	5	0.1%
Not from concentrate	4	4	4	4	4	0.0%

Nectars (25-99% juice content)

Total nectars	2	2	2	2	2	0.5%
Branded	1	1	1	1	1	0.5%
Private label	1	1	1	1	1	0.5%

Malta

Population: **0.4 million**

Total fruit juice and nectars

Volume, million litres*		2008	2009	2010	2011	2012	% change
Total		**8**	**9**	**9**	**9**	**9**	**2.0%**
Fruit juice (100% juice content)							
Total fruit juice		5	5	5	6	6	0.9%
	Branded	5	5	5	5	5	-0.8%
	Private Label	0	0	0	1	1	15.0%
Ambient		5	5	5	5	5	-0.2%
Chilled		0	0	0	0	0	23.3%
From concentrate		5	5	5	6	6	2.0%
Not from concentrate		0	0	0	0	0	0.0%
Nectars (25-99% juice content)							
Total nectars		3	3	4	4	4	3.5%
	Branded	3	3	4	4	4	3.1%
	Private label	0	0	0	0	0	25.0%

Norway

Population: **4.7 million**

Total fruit juice and nectars

Volume, million litres*		2008	2009	2010	2011	2012	% change
Total		**150**	**155**	**153**	**153**	**154**	**0.9%**
Fruit juice (100% juice content)							
Total fruit juice		134	139	138	138	141	1.8%
	Branded	90	91	84	84	72	-14.4%
	Private Label	44	48	54	54	69	26.9%
Ambient		74	80	84	82	78	-4.9%
Chilled		59	59	54	56	63	11.6%
From concentrate		113	113	115	113	112	-0.1%
Not from concentrate		21	26	23	25	29	12.2%
Nectars (25-99% juice content)							
Total nectars		17	16	15	14	13	-8.1%
	Branded	9	7	6	5	4	-20.0%
	Private label	8	9	9	9	9	-1.0%

Portugal

Population: **10.8 million**

Total fruit juice and nectars

Volume, million litres*		2008	2009	2010	2011	2012	% change
Total		**111**	**114**	**116**	**105**	**102**	**-3.6%**
Fruit juice (100% juice content)							
Total fruit juice		27	28	27	24	23	-5.3%
	Branded	17	14	12	9	8	-8.0%
	Private Label	11	14	15	15	14	-3.6%
Ambient		25	25	24	22	21	-5.3%
Chilled		2	3	2	2	2	-5.1%
From concentrate		25	25	24	22	21	-5.3%
Not from concentrate		2	3	2	2	2	-5.1%
Nectars (25-99% juice content)							
Total nectars		84	86	89	81	79	-3.1%
	Branded	70	63	63	56	52	-7.6%
	Private label	14	23	26	25	27	6.8%

Romania

Population: **21.8 million**

Total fruit juice and nectars

Volume, million litres*		2008	2009	2010	2011	2012	% change
Total		**111**	**88**	**68**	**58**	**55**	**-5.3%**
Fruit juice (100% juice content)							
Total fruit juice		33	27	24	22	21	-4.0%
	Branded	30	24	21	17	16	-6.0%
	Private Label	2	3	3	4	4	4.2%
Ambient		33	27	24	22	21	-4.0%
Chilled							
From concentrate		33	27	24	22	21	-4.0%
Not from concentrate							
Nectars (25-99% juice content)							
Total nectars		78	61	44	36	34	-6.1%
	Branded	73	55	37	28	26	-9.7%
	Private label	5	6	7	8	8	6.7%

Slovakia

Population: **5.5 million**

Total fruit juice and nectars

Volume, million litres*		2008	2009	2010	2011	2012	% change
Total		**55**	**47**	**47**	**39**	**36**	**-7.7%**
Fruit juice (100% juice content)							
Total fruit juice		26	25	27	21	20	-5.2%
	Private Label	16	14	14	10	9	-18.3%
	Branded	11	11	14	11	12	7.4%
Ambient		26	25	27	21	19	-6.3%
Chilled		0	0	0	1	1	28.6%
From concentrate		26	24	27	21	19	-6.3%
Not from concentrate		0	1	0	1	1	28.6%
Nectars (25-99% juice content)							
Total nectars		29	22	20	18	16	-10.8%
	Branded	17	15	13	12	11	-11.7%
	Private label	12	7	7	6	5	-8.9%

Slovenia

Population: **2.0 million**

Total fruit juice and nectars

Volume, million litres*		2008	2009	2010	2011	2012	% change
Total		**41**	**41**	**41**	**39**	**36**	**-8.2%**
Fruit juice (100% juice content)							
Total fruit juice		10	12	13	13	13	3.9%
	Branded	6	6	7	6	6	-7.1%
	Private Label	4	5	6	7	8	14.4%
Ambient		10	12	13	13	13	3.9%
Chilled							
From concentrate		10	12	13	13	13	3.9%
Not from concentrate							
Nectars (25-99% juice content)							
Total nectars		31	30	28	26	23	-14.1%
	Branded	19	18	17	15	13	-14.3%
	Private label	12	12	12	11	10	-13.7%

Switzerland

Population: **8.0 million**

Total fruit juice and nectars						
Volume, million litres*	**2008**	**2009**	**2010**	**2011**	**2012**	**% change**
Total	**208**	**208**	**204**	**201**	**197**	**-1.7%**
Fruit juice (100% juice content)						
Total fruit juice	158	158	155	153	150	-1.7%
Branded	84	84	85	83	79	-5.2%
Private Label	74	74	70	70	72	2.5%
Ambient	145	144	142	138	134	-3.0%
Chilled	13	14	13	15	16	11.1%
From concentrate	145	144	141	137	133	-2.9%
Not from concentrate	13	14	14	16	18	8.9%
Nectars (25-99% juice content)						
Total nectars	49	50	49	48	47	-1.9%
Branded	14	17	16	16	15	-8.0%
Private label	35	32	33	32	32	1.2%

Turkey

Population: **74.9 million**

Total fruit juice and nectars						
Volume, million litres*	**2008**	**2009**	**2010**	**2011**	**2012**	**% change**
Total	**585**	**586**	**624**	**678**	**632**	**-6.8%**
Fruit juice (100% juice content)						
Total fruit juice	55	47	50	53	51	-4.08%
Branded	52	44	46	48	47	-2.8%
Private Label	2	4	4	5	5	-15.9%
Ambient	51	45	47	50	47	-5.9%
Chilled	3	2	3	4	4	21.4%
From concentrate	52	40	41	44	42	-3.0%
Not from concentrate	3	7	10	10	9	-8.7%
Nectars (25-99% juice content)						
Total nectars	531	538	574	625	581	-7.0%
Branded	492	482	507	544	505	-7.3%
Private label	38	56	67	80	76	-4.9%

Definitions

Fruit juices 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 (eg 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 puree and juice drinks with a thick, smooth texture, sometimes incorporating a dairy element (yogurt) and/or functional elements (eg 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.

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 for 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 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, eg 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 eg 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.

Industry terms

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

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 and accommodation; institutions; other on-premise eg 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.
Definitions are Canadean standard beverage category definitions.
Blank/0.0 denotes data not available or volume less than 0.05 million litres or zero.
E = estimate
Credits: Data: Canadean.

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 contacts with EU Institutions and other relevant organizations;
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. **Provide**, in collaboration with the European Quality Control System (EQCS), 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;
4. **Inform and advise** the fruit juice industry on all aspects of European legislation likely to affect their businesses;
5. **Liaise** with national, regional and worldwide interests representing the fruit juice industry to foster and achieve overall AIJN objectives.

AIJN Executive Board

President: Andrew BILES, CEO, Gerber Emig Group Ltd, UK

1st Vice-President: Jorgen DIRKSEN, Managing Director, Rynkeby Foods A/S, Denmark

2nd Vice-President: Angel SANCHEZ, Director General, Conserve Italia, Spain

Members: Wolfgang SCHWALD, General Manager Fruit Processing and Sales, Rauch Fruchtsäfte GmbH & Co OG, Austria; Bruno VAN GOMPEL, Technical Director of Coca-Cola Northwest Europe & Nordics, Belgium; Thomas MERTENS, Managing Director Supply Chain, Riha-Wesergold, Germany; Vincent DELOZIERE, General Manager, Refresco France; Piotr PODOBA, CEO of Dinter Polska Sp. zo.o., Poland; Leopoldo CAGNASSO, Business Unit Director Parmalat/Santal, Italy

Membership

The AIJN membership is composed of national fruit juice associations from 15 EU Member States and from two countries that applied for EU membership. For more information on membership benefits, please visit **www.aijn.org**

Secretariat

Mr. Jan Hermans – Secretary General, Mrs. Karin Batstra – Office Manager, Mrs. Milica Jevtic – Regulatory Affairs Manager, Mrs. Lurdes Soares – Technical & Scientific Affairs Manager

AIJN members

Austria
Verband der Österreichischen Fruchtsaft- Und Fruchtsirupindustrie
www.getraenkeverband.at/cms/content/view/102/114

Belgium
Ajunec – Association Belge Des Fabricants, Embouteilleurs et Importateurs De Jus De Fruits Et Nectars

Cyprus
The Cyprus Canners & Fruit Juice Manufacturers Association
Cyprus Canning Co Ltd
www.kean.com.cy

Denmark
Danish Fruit Juice and Jam Industries
www.foedevarer.di.dk

Finland
Juice and Preserves Industries' Association
www.etl.fi

France
Union Nationale des Producteurs De Jus De Fruits (UNIJUS)
www.jusdefruits.org

Germany
Verband Der Deutschen Fruchtsaft-Industrie e.V.
www.fruchtsaft.org

Ireland
Fruit Juice Producers of Ireland
www.beveragecouncilofireland.ie

Italy
A.I.I.P.A. – Associazione Italiana Industrie Prodotti Alimentari
www.aiipa.it

FEDERVINI
www.federalimentare.it

Conserve Italia Scarl
www.conserveitalia.it

The Netherlands
FWS
www.fws.nl

Poland
Polish Association of Juice Producers (KUPS)
www.kups.org.pl

Portugal
Sumol+Compal
www.sumolcompal.pt

Spain
Asozumos – Asociación Española de Fabricantes de Zumos
www.asozumos.org

A.I.Z.C.E. – Asociación Española de la Industria de Zumos Y Concentrados de Frutos Citricos Y Sus Productos Derivados
www.zumosdefrutas.org

Sweden
Swedish Juice Association
Livsmedelsföretagen (Li) – Swedish Food Federation
www.li.se

United Kingdom
British Soft Drinks Association
www.britishsoftdrinks.com

Serbia
Serbian Fruit Juice Producers Association (SFJPA)

Turkey
The Turkish Fruit Juice Industry Association (MEYED)
www.meyed.org.tr

Observer members

SIG Combibloc

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