AIJN

European Fruit Juice Association

2015

Liquid Fruit

MARKET REPORT

Contents

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Introduction from the President

Welcome to the 2015 edition of the European Fruit Juice Association (AIJN) Market Report. It is our goal to provide a comprehensive overview of our industry to European and national legislators, non-governmental organisations and fellow stakeholders in the food and drinks industry with this report, so wherever you are in the world, a very warm welcome to you.

As the newly-elected AIJN President, I would like to start off by thanking all of the national associations for the trust accorded to me in this challenging and turbulent time for the European Fruit Juice Industry.

For those of you who do not already know me, I am from the Netherlands and represent the Dutch FWS. I have enjoyed a long and successful international career with Nestle SA, before taking up the position of Managing Director of FrieslandCampina Riedel 2 years ago. I have a Masters in Business Administration, am married and have two children.

It has been a very busy and exciting year for the AIJN, most notably because of several major projects that our industry is involved in and because of the departure of our former President, Andrew Biles.

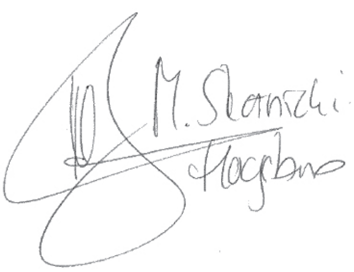
Andrew has been an integral part of the AIJN for over 10 years and his guidance and leadership on key issues and projects have been crucial in defining the path of the AIJN. I would therefore like to take this opportunity to thank Andrew for all the work he has put into the fruit juice industry association, and to wish him the best of luck and much success in his future endeavors.

We have been very active in terms of the major projects we have been working on, the AIJN Juice Marketing Campaign and the Fruit Juice CSR Platform. More information on both is provided within this report. Moreover, I would like to point out that AIJN is celebrating 25 years of its Code of Practice this year. The AIJN Code of Practice has been a crucial tool for the AIJN and has become the world-wide reference guide for authenticity and quality of fruit juices. More details and an interview with one of the COP experts of the first hour can be found in this edition of the AIJN Market Report.

2015 will also see the AIJN co-organising the third Juice Summit, which is now becoming the annual, global industry event. Due to the immense success and positive reviews from last year, we have decided to hold it in Antwerp once again. Together with its partners, IFU and SGF, the AIJN will assemble global suppliers, bottlers and customers in what has clearly become the "must-attend" conference for senior fruit juice executives across the globe. If you have not done so already, make sure to save the dates of 7 and 8 October in your calendars, and we'll look forward to seeing you in Antwerp. Please visit: www.juicesummit.org to register.

Finally, I would like to thank all of those who dedicate their time to our Board and to our Committees. It is only when you are a part of one of these that you really appreciate the workload and the time that goes into it. I would also like to extend a special thank you to the staff at the AIJN Secretariat, without whose help and effort we would not be able to function as successfully as we do.

Have a great summer, and I look forward to welcoming you in Antwerp at the 2015 JUICE SUMMIT.



Marjan Skotnicki-Hoogland, AIJN President

"The AIJN Code of Practice has been a crucial tool for the AIJN and has become the world-wide reference guide for authenticity and quality of fruit juices."

EU Total Fruit Juice and Nectars

EU: Total fruit juice and nectars

Volume, million litres*		2010	2011	2012	2013	2014	% change
Total		**11,118**	**10,819**	**10,469**	**10,028**	**9,702**	**-3.3%**
	Private label	**4,798**	**4,683**	**4,558**	**4,301**	**4,077**	**-5.2%**
	Branded	**6,320**	**6,135**	**5,911**	**5,726**	**5,624**	**-1.8%**
Fruit juice (100% juice content)							
Total fruit juice		7,191	7,024	6,786	6,478	6,215	-4.1%
	Private label	3,332	3,234	3,096	2,899	2,694	-7.1%
	Branded	3,859	3,790	3,691	3,579	3,521	-1.6%
Chilled		1,323	1,360	1,403	1,407	1,393	-1.0%
Ambient		5,868	5,665	5,383	5,071	4,822	-4.9%
From concentrate		5,585	5,300	4,995	4,647	4,367	-6.0%
Not from concentrate		1,606	1,725	1,791	1,830	1,848	1.0%
Nectars (25-99% juice content)							
Total nectars		3,927	3,794	3,683	3,550	3,486	-1.8%
	Private label	1,466	1,449	1,463	1,402	1,383	-1.4%
	Branded	2,461	2,345	2,220	2,148	2,103	-2.1%

Largest EU FJN market by volume consumption, 2014

Country	Million litres
Germany	2,405
France	1,551
United Kingdom	1,192
Spain	968
Poland	699
Others	2,887
Total	9,702

Largest EU FJN market by per capita consumption, 2014

Country	Population (million)	Litres per person
Malta	0.4	33.6
Germany	81.0	29.7
Netherlands	16.8	26.8
Finland	5.4	25.3
Cyprus	1.2	24.3

Largest FJN markets by volume consumption by region, 2014

Region	Million litres
North America	9,480
West Europe	8,793
Asia Pacific	8,330
East Europe	4,794
Latin America	3,631
Africa & Middle East	3,625
Total	38,653
EU 28	9,702

Largest FJN markets by per capita consumption by region, 2014

Country	Population (million)	Litres per person
North America	354.3	26.8
West Europe	416.8	21.1
EU 28	507.5	19.1
East Europe	397.7	12.1
Latin America	617.4	5.9
Africa & Middle East	1,362.6	2.7
Asia Pacific	4,041.1	2.1

25 Years AIJN Code of Practice

The first version of the European Fruit Juice Directive 75/726/EEC which came into force in 1975 established some of the requirements that fruit juices and similar products had to meet. In article 13 of this Directive it was stated that the "*analytical and microbiological characteristics of the products defined*" had to be determined by the European Council on a proposal from the Commission, but this was never done.

In a later amendment of the Fruit Juice Directive, the provision in Article 13 was deleted and the European Fruit Juice Industry was left with the task of establishing the analytical parameters, as well as other requirements, that fruit juices produced and sold in the European Union had to fulfil. At the end of the 1980's, AIJN took on the challenge to provide the necessary parameters for industrially-processed fruit juices and a working group within its Technical Committee was set up which would eventually become the permanent Code of Practice Expert Group.

The designated experts started their work by determining analytical characteristics for the major flavours, i.e. apple, grapefruit, orange and grape juice, and decided that the individual documents setting out the analytical characteristics of those juices would be called "Reference Guidelines". These guidelines were approved by the AIJN General Assembly on 3 May 1990 in Bruges and it was agreed to call the collection of these guidelines the "Code of Practice" (COP). Thus, the AIJN COP was officially born.

A wide range of factors can influence the composition of fruits, be it natural factors such as fruit variety, soil properties, weather, or factors like the extraction and processing techniques used to make a juice. Despite all the known, and sometimes unknown influences, the experience shows that a large number of parameters and values are subject to statistical laws. Consequently, it is possible to define with some degree of confidence the minimum or maximum values and/or ranges for several characteristics that are frequently found in a typical fruit juice. The Reference Guidelines therefore attempt to consolidate such minimum and maximum values and/or ranges which can then be used to evaluate juices with regards to quality, authenticity and identity.

From the initial four Reference Guidelines, the Code of Practice has evolved substantially and today it comprises of twenty five individual Reference Guidelines for different fruit juices. The guidelines are divided into two parts. The first part is the A criteria which are parameters and values that characterize the basic quality requirements which the industry considers as being mandatory for all fruit juices marketed in the EU. These parameters include degrees Brix, hygiene requirements (volatile acids, ethanol, patulin, etc.), environmental contaminants and compositional substances like L-ascorbic acid, volatile oil, and others. The B-criteria are parameters related to the identity and authenticity of the juice in question.

But the AIJN Code of Practice is not just about the Reference Guidelines for individual fruit juices. Much more has been accomplished in the last 25 years. The Code of Practice contains several guidance documents which respond to the needs of an evolving industry. Examples include: the '*Guide to Good Hygiene Practices in the Juice Industry*', which offers guidance for food business operators to enable them to adhere to European hygiene regulations and to produce and market safe fruit and vegetable juice products; the '*Alicyclobacillus Best Practice Guideline*', which identifies practices and measures for the reduction and control of Alicyclobacillus bacteria in fruit juices, juice concentrates, purées and nectars; the '*Microbiological Guidelines for Fruit and Vegetable Semi-Finished Products*', specifically concerned with those organisms known to be capable of growing in fruit and vegetable juices, purées and concentrates that have a pH significantly less than 4.3; the '*Guideline for Vegetable Juices and Nectars*' which offers definitions on different products, authorised treatments and ingredients as well as minimum juice content for vegetable nectars; the '*Standard Nutrient Values for Fruit Juices*' guidance document that establishes nutrition tables for the most common juices (orange, apple, pineapple, grape, grapefruit, tomato); as well as several other guidance documents.

An important highlight of these 25 years of COP history was the reference made by the European Commission in the 2009 revision of the Fruit Juice Directive which stated that: "*The AIJN Code of Practice establishes quality factors for fruit juice from concentrate and is internationally used as a reference standard for self-regulation in the fruit juice industry.*[1]"

The continuous development and improvement of the AIJN Code of Practice is the result of the efforts and dedication of a highly qualified group of international professionals who constitute the Code of Practice Expert Group. They have strong expertise and knowledge about processed fruit and come from both the processing and bottling industries, as well as from universities, technical institutes, processing equipment suppliers, and commercial laboratories.

To this day, we still rely on the immense knowledge of some of the experts who joined the group in the early stages. This therefore presents us with a great opportunity to sincerely thank all of the experts who have contributed to the AIJN Code of Practice until now. Their expertise, professionalism and dedication have left a permanent imprint on the fruit juice industry.

[1] Commission Directive 2009/106/EC of 14 August 2009 amending Council Directive 2001/112/EC relating to fruit juices and certain similar products intended for human consumption

AIJN Code of Practice

Meet the Expert

Dr. Karl Neuhäuser, Director Quality and Sustainability, **Eckes-Granini Group GmbH**

For how long have you been an expert in the COP group?
My official start was as a member of the so called "pineapple juice expert group", beginning its work in 1992. Just before, in 1990, four reference guidelines (orange, grapefruit, apple and grape) were finished and published. Further members of this "pineapple juice expert group" were Stefano Gherardi (Italy), Martin Greave (Netherlands), B. Harris (UK) and George Mangeot (France).

But unofficially - as a co-worker of Alfred Wiesenberger, one of the founding fathers of the CoP - I participated in the CoP-work from the early beginning (~ 1988).

What were the expectations you had when you became an expert in the group? Did these expectations come true?
With the publication of the first four fruits in 1990 the importance of the AIJN-CoP could already be underlined: a document representing the European custom of trade. My expectation was that this real European approach replaces the still existing national approaches (e.g. RSK in Germany, AFNOR in France or similar standards in the Netherlands) and that a globally-acceptable document could be created. Both expectations came true. Great appreciation to the long-time chairman of the CoP-EG: Martin Greave.

> I'm convinced that the COP sets the basis for our industry's target to get rid of adulteration, unfair competition and negative publicity.

Comparing the work the group was doing at the time you entered with what is currently being done, what would you say have been the main changes, if any, over the years?
Today the CoP work is much more complex and faster. The maintenance of existing and the development of new Reference Guidelines is not the only focus. Meanwhile the group is dealing with all technical and analytical issues which are relevant for quality and authenticity or can hurt our industry (contaminants, GMOs ...). And, we have to consider that analytical methods have improved a lot.

In your opinion, what have been the main achievements of the AIJN COP over these 25 years?
The AIJN COP is covering the major part of our industry and is accepted nearly all over the world. It is an up-to-date and "living" document with current new knowledge integrated. The COP is the guidance standard (besides legislation) for industrial self-control within EQCS (bottlers) and SGF-IRMA (raw materials).

And the main challenges?
Clearness and transparency has to remain a high priority. AIJN has to pay attention that it does not support any dilution of quality.

If Mother Nature comes to strange parameters - which does happen – it has to be clearly indicated as a seasonal and/or regional exception. Here, the COP has defined procedures which have to be kept.

Would you agree the AIJN COP has contributed to a more transparent, responsible and competitive industry?
I'm convinced that the COP sets the basis for our industry's target to get rid of adulteration, unfair competition and negative publicity. Having in mind what happened in the '80s and '90s and looking to the statistics of EQCS, one can see the improvement.

In your view, what is the future for the AIJN COP?
I'm quite sure that the AIJN is continuing the COP work in a professional way with highly experienced and committed experts. By doing this, the high value for our industry will remain.

AIJN Juice Marketing Campaign

Increasingly, juices are finding themselves under attack in the media and this is having an impact on sales. In order to re-balance these attacks, the industry asked the AIJN to develop a pan-European marketing programme to support the industry.

The primary goal of the marketing campaign is to protect and celebrate 100% fruit juice. There is no simple solution to resolve the problems we are facing, but it is crucial that we start proactively supporting fruit juice and its benefits as soon as possible.

> In order to engage the media and provide credible facts, we need the help of scientists and nutritionists.

Ultimately, our objective is to change consumer perceptions and behaviours so that they recognise the benefits of drinking fruit juice and build juice into their daily routines. However, before we can engage these consumers directly, we know that we have to get the media on our side first.

The media are currently only sharing one side of the argument, and we therefore urgently need to re-balance the conversation and proactively provide them with positive news about juice. Our messaging needs to be supported with credible facts, which will help the media present a more favourable view of juices.

In order to engage the media and provide credible facts, we need the help of scientists and nutritionists – many of whom already support juice, but who have not been fairly represented in the media to date. Using independent, renowned scientists and nutritionists will give the industry the credibility it needs to start talking to the media, who will then engage consumers.

Our core message is that 100% fruit juice is fruit, juiced. It contains nutrients which can contribute to your health and wellbeing, and is a tasty and convenient way to get an additional serving of fruit as part of a healthy lifestyle. Moreover, the European fruit juice sector is committed to maintaining high standards of quality and sustainability and has adopted solid production practices to ensure juice products are safe to consume.

To help deliver this campaign, there will be materials to back-up the message house including a glossary, a nutrient chart for 100% fruit juices, a set of FAQ's/Q & A's, which will address common questions on fruit juice issues, as well as fact sheets on specific topics. A campaign website is also planned, which will contain all the campaign toolbox materials.

It is important to remember that the industry is facing many of the same issues across Europe. This means that we should work together to face this challenge. The AIJN will equip each national association with tools and capabilities to run the campaign locally, including messaging, marketing materials and credible, scientific back-up that can be used as a basis for activation in each country. With these central materials, local associations will be equipped to activate a plan that works in their respective markets.

The campaign's success significantly depends on active engagement from each national association. We are conscious of the fact that some national associations are already doing a lot of work in order to promote the benefits of fruit juice. This is why we want to ensure that all work on the PR Campaign will complement the work which has already been carried out by national associations. It is critical that national associations are involved to commit, support, deliver, and in the long-term, maintain the programme.

> It is important to remember that the industry is facing many of the same issues across Europe.

Overall, the aim of this campaign is to change people's behaviour regarding fruit juice. We want consumers to see fruit juice as a key part of a healthy diet and really understand the benefits which it brings. By using the credible science we have, we hope to accelerate positive media coverage and ultimately, to create positive foundations which enable growth for the entire European fruit juice industry.

The CSR Path of the Fruit Juice Industry

Fruit Juice CSR Principles

- Aim for food security, health and nutrition
- Be environmentally responsible – protect and enhance the environment
- Ensure economic viability and share value
- Respect human rights, create acceptable working conditions and help communities to thrive
- Encourage good governance and accountability
- Promote access and transfer of knowledge, skills and technology

In today's competitive markets, consumers are becoming more and more aware of how their purchases affect social, economic and environmental conditions of millions of people involved in the production of goods they buy, and so is the fruit juice industry. As the rules of doing business are changing, companies are facing increasing expectations from NGOs, media, governments, and others to take responsibility for the impact of their business operations. European fruit juice producers have proactively acknowledged this responsibility. There are a number of AIJN initiatives that prove this commitment.

The main one is the development of the Fruit Juice CSR Platform (www.juicecsr.eu), initially supported and co-funded by the European Commission. This multi-stakeholder Platform aims to promote:

- A common understanding and agreement on CSR in the fruit juice industry, including areas to collaborate on and ways to track progress
- Enhanced performance on addressing social, environmental and economic concerns, creating shared value throughout the supply chain
- Greater visibility of CSR and sustainability efforts in the fruit juice sector

As a concrete output of its first phase of operation, the Fruit Juice CSR Platform developed a Sector CSR Roadmap providing the framework upon which the Platform will base all its activities and programmes going forward. This Roadmap presents a set of 6 CSR principles, based on the UN Global Compact Food and Agriculture Business Principles (FABs), and forms the foundation for continued collaboration on strategic CSR in the fruit juice sector. It also provides an overview of existing tools and initiatives that are relevant for and applicable to the fruit juice sector and can be used (individually or in collaboration) as instruments for demonstrating commitment to the CSR principles. The Roadmap is a living document, which will be updated regularly as new developments and insights require.

Furthermore, AIJN recently revised and approved a new Code of Business Conduct which is based on both the Six Fruit Juice CSR Principles of the CSR Sector Roadmap and the former SGF/IRMA Code of Conduct. This AIJN Code is founded on the basis of general principles contained in the International Bill of Human Rights, Fundamental ILO Conventions, relevant United Nations Conventions and Guidelines, SAI Farm Sustainability Assessment and other relevant internationally-recognised standards. Its purpose is to ensure that all players in the fruit juice value chain operate in accordance with internationally-recognised minimum standards on human rights, labour and environment. The Code applies to all companies involved in the production of fruit juices, from producers of raw materials to producers of consumer goods.

All these initiatives come in addition to national laws on standard labour conditions that exist in every supplying and producing country, and which are reinforced by collective agreements and voluntary practices adopted by individual companies. They seek additional benefits for workers, their families and the community at large. AIJN fully supports these actions and is devoted to working towards higher transparency and sector-wide commitments in this area.

Austria

Population: **8.5 million**

Total fruit juice and nectars

Volume, million litres*		2010	2011	2012	2013	2014	% change
Total		242	233	229	213	197	-7.6%

Fruit juice (100% juice content)

		2010	2011	2012	2013	2014	% change
Total fruit juice		160	155	153	144	132	-8.4%
	Branded	87	85	85	84	76	-10.1%
	Private label	73	70	68	60	57	-6.1%
Ambient		143	139	136	128	114	-11.6%
	Branded	77	76	75	75	65	-12.9%
	Private label	66	63	61	54	49	-9.8%
From concentrate		140	136	133	126	111	-11.8%
	Branded	74	73	72	72	62	-13.3%
	Private label	66	63	61	54	49	-9.8%
Not from concentrate		3	3	3	3	3	-0.8%
	Branded	3	3	3	3	3	-0.8%
Chilled		17	17	17	16	19	16.8%
	Branded	10	9	10	9	11	11.5%
	Private label	7	7	7	7	8	24.4%
Not from concentrate		17	17	17	16	19	16.8%
	Branded	10	9	10	9	11	11.5%
	Private label	7	7	7	7	8	24.4%
of which are smoothies		2	3	3	3	5	38.1%
	Branded	2	3	3	3	3	-14.8%
	Private label	0	0	0	0	2	0.0%

Nectars (25-99% juice content)

		2010	2011	2012	2013	2014	% change
Total nectars		83	78	76	68	64	-5.8%
	Branded	49	46	45	42	39	-6.3%
	Private label	33	32	31	26	25	-5.0%
Ambient		83	78	76	68	64	-5.8%
	Branded	49	46	45	42	39	-6.3%
	Private label	33	32	31	26	25	-5.0%
From concentrate		83	78	76	68	64	-5.8%
	Branded	49	46	45	42	39	-6.3%
	Private label	33	32	31	26	25	-5.0%

Belgium

Population: **11.2 million**

Total fruit juice and nectars

Volume, million litres*		2010	2011	2012	2013	2014	% change
Total		222	222	213	213	210	-1.1%

Fruit juice (100% juice content)

		2010	2011	2012	2013	2014	% change
Total fruit juice		186	186	177	177	174	-1.4%
	Branded	75	74	68	68	66	-2.1%
	Private label	111	112	110	109	108	-1.0%
Ambient		170	169	160	158	154	-3.0%
	Branded	64	61	55	54	51	-6.1%
	Private label	106	108	105	104	103	-1.4%
From concentrate		170	169	160	158	153	-3.0%
	Branded	64	61	55	54	51	-6.1%
	Private label	106	108	105	104	103	-1.4%
Not from concentrate		0.3	0.2	0.2	0.2	0.1	-14.7%
	Branded	0.3	0.2	0.2	0.2	0.1	-14.7%
Chilled		16	17	17	18	21	12.5%
	Branded	12	12	12	14	15	13.7%
	Private label	5	5	5	5	5	9.3%
From concentrate		0.0	0.0	0.1	0.2	0.2	0.0%
	Branded	0.0	0.0	0.1	0.2	0.2	0.0%
Not from concentrate		16	17	17	18	21	12.7%
	Branded	12	12	12	13	15	13.9%
	Private label	5	5	5	5	5	9.3%
of which are smoothies		0.2	0.0	0.1	0.3	0.4	40.0%
	Branded	0.2	0.0	0.1	0.2	0.3	25.0%
	Private label	0.0	0.0	0.0	0.1	0.1	100.0%

Nectars (25-99% juice content)

		2010	2011	2012	2013	2014	% change
Total nectars		36	36	36	36	36	0.6%
	Branded	23	23	22	23	24	2.2%
	Private label	13	13	13	13	13	-2.3%
Ambient		35	35	35	35	35	0.0%
	Branded	22	22	21	22	23	1.4%
	Private label	13	13	13	13	13	-2.3%
From concentrate		35	35	35	35	35	0.0%
	Branded	22	22	21	22	23	1.4%
	Private label	13	13	13	13	13	-2.3%
Chilled		1.2	1.0	1.0	0.7	0.9	28.6%
	Branded	1.2	1.0	1.0	0.7	0.9	28.6%
From concentrate		1.2	1.0	1.0	0.7	0.9	28.6%
	Branded	1.2	1.0	1.0	0.7	0.9	28.6%
of which are smoothies		0.4	0.5	0.5	0.4	0.5	12.5%
	Branded	0.4	0.5	0.5	0.4	0.5	12.5%

France

Population: **66.2 million**

Total fruit juice and nectars

Volume, million litres*		2010	2011	2012	2013	2014	% change
Total		**1,693**	**1,713**	**1,681**	**1,621**	**1,551**	**-4.3%**

Fruit juice (100% juice content)

Total fruit juice		1,298	1,328	1,314	1,281	1,240	-3.2%
	Branded	577	592	583	586	581	-0.7%
	Private label	721	736	731	695	658	-5.3%
Ambient		1,164	1,181	1,152	1,111	1,062	-4.4%
	Branded	480	490	471	468	456	-2.4%
	Private label	685	691	682	643	606	-5.8%
From concentrate		603	573	544	508	472	-7.2%
	Branded	187	176	160	151	145	-4.2%
	Private label	417	397	385	357	327	-8.4%
Not from concentrate		561	608	608	602	590	-2.1%
	Branded	293	314	311	317	312	-1.6%
	Private label	268	294	297	286	278	-2.6%
of which are smoothies		0.4	0.4	0.4	0.4	0.2	-58.3%
	Branded	0.4	0.4	0.4	0.4	0.2	-58.3%
Chilled		134	147	162	170	178	4.6%
	Branded	97	102	112	118	125	5.9%
	Private label	37	45	49	52	53	1.6%
Not from concentrate		134	147	162	170	178	4.6%
	Branded	97	102	112	118	125	5.9%
	Private label	37	45	49	52	53	1.6%
of which are smoothies		14	15	15	15	15	-2.1%
	Branded	9	9	8	8	6	-19.6%
	Private label	5	6	7	7	9	16.4%

Nectars (25-99% juice content)

Total nectars		395	385	367	340	311	-8.6%
	Branded	107	106	99	96	94	-1.9%
	Private label	288	279	268	244	217	-11.2%
Ambient		376	367	346	317	288	-9.0%
	Branded	89	90	80	75	73	-1.9%
	Private label	287	277	267	242	215	-11.3%
From concentrate		376	367	346	317	288	-9.0%
	Branded	89	90	80	75	73	-1.9%
	Private label	287	277	267	242	215	-11.3%
of which are smoothies		4	3	5	4	5	1.4%
	Branded	1	0.4	2	2	1	-22.0%
	Private label	3	3	3	3	3	16.9%
Chilled		19	18	21	23	22	-2.1%
	Branded	18	17	19	21	21	-1.8%
	Private label	2	2	2	2	2	-5.8%
From concentrate		19	18	21	23	22	-2.1%
	Branded	18	17	19	21	21	-1.8%
	Private label	2	2	2	2	2	-5.8%
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: **81.0 million**

Total fruit juice and nectars

Volume, million litres*		2010	2011	2012	2013	2014	% change
Total		**2,810**	**2,733**	**2,607**	**2,486**	**2,405**	**-3.3%**

Fruit juice (100% juice content)

Total fruit juice		1,915	1,900	1,824	1,747	1,669	-4.5%
	Branded	978	964	935	910	896	-1.5%
	Private label	937	935	889	838	772	-7.8%
Ambient		1,858	1,844	1,757	1,666	1,573	-5.6%
	Branded	928	915	874	835	810	-3.0%
	Private label	930	929	883	831	763	-8.1%
From concentrate		1,643	1,622	1,533	1,442	1,346	-6.6%
	Branded	893	873	824	785	761	-2.9%
	Private label	750	748	709	657	585	-11.1%
Not from concentrate		215	222	224	224	227	1.4%
	Branded	35	41	50	50	48	-3.9%
	Private label	181	180	174	174	179	2.9%
of which are smoothies		0	0	0	0	0	0.0%
	Branded	0	0	0	0	0	0.0%
Chilled		57	56	67	81	95	17.4%
	Branded	50	49	61	75	86	15.9%
	Private label	7	7	6	7	9	34.9%
From concentrate		34	33	39	42	44	5.4%
	Branded	34	33	39	42	44	5.4%
Not from concentrate		23	23	28	39	51	30.2%
	Branded	17	16	21	33	42	29.3%
	Private label	7	7	6	7	9	34.9%
of which are smoothies		10	10	10	13	17	35.8%
	Branded	4	4	3	6	8	36.9%
	Private label	7	7	6	7	9	34.9%

Nectars (25-99% juice content)

Total nectars		895	833	783	739	737	-0.3%
	Branded	499	487	448	422	400	-5.1%
	Private label	396	346	336	317	337	6.1%
Ambient		889	828	778	734	736	0.2%
	Branded	493	482	442	417	399	-4.3%
	Private label	396	346	336	317	337	6.1%
From concentrate		889	828	778	734	735	0.2%
	Branded	493	482	442	416	399	-4.3%
	Private label	396	346	336	317	337	6.1%
Not from concentrate		0	0	0	1	1	0.0%
	Branded	0	0	0	1	1	0.0%
Chilled		6	5	5	4	1	-86.4%
	Branded	6	5	5	4	1	-86.4%
From concentrate		6	5	5	4	1	-86.4%
	Branded	6	5	5	4	1	-86.4%
of which are smoothies		5	4	4	4	1	-88.4%
	Branded	5	4	4	4	1	-88.4%

Italy

Population: **59.6 million**

Total fruit juice and nectars

Volume, million litres*	2010	2011	2012	2013	2014	% change
Total	**807**	**808**	**774**	**726**	**690**	**-5.0%**

Fruit juice (100% juice content)

		2010	2011	2012	2013	2014	% change
Total fruit juice		172	165	155	141	133	-5.9%
	Branded	118	112	102	90	84	-7.1%
	Private label	54	53	52	51	49	-3.8%
Ambient		154	148	139	128	121	-5.6%
	Branded	106	102	93	83	78	-6.6%
	Private label	48	46	45	45	43	-3.9%
From concentrate		154	148	139	127	119	-6.0%
	Branded	106	102	93	82	76	-7.2%
	Private label	48	46	45	45	43	-3.9%
Not from concentrate		0	0	0	1	1	52.9%
	Branded	0	0	0	1	1	52.9%
of which are smoothies		2	1	1	1	1	-37.5%
	Branded	2	1	1	1	1	-37.5%
Chilled		18	17	16	13	12	-8.4%
	Branded	11	11	9	7	6	-13.0%
	Private label	7	7	7	6	6	-3.0%
From concentrate		1	2	4	3	2	-23.1%
	Branded	1	2	4	3	2	-23.1%
Not from concentrate		17	15	12	10	10	-4.1%
	Branded	10	9	5	4	4	-5.8%
	Private label	7	7	7	6	6	-3.0%
of which are smoothies		4	3	2	1	1	-24.8%
	Branded	4	3	2	1	1	-24.8%

Nectars (25-99% juice content)

		2010	2011	2012	2013	2014	% change
Total nectars		635	643	620	584	557	-4.7%
	Branded	474	448	407	373	351	-5.8%
	Private label	161	195	213	212	206	-2.8%
Ambient		635	643	620	584	557	-4.7%
	Branded	474	448	407	373	351	-5.8%
	Private label	161	195	213	212	206	-2.8%
From concentrate		635	643	620	584	557	-4.7%
	Branded	474	448	407	373	351	-5.8%
	Private label	161	195	213	212	206	-2.8%

Netherlands

Population: **16.8 million**

Total fruit juice and nectars

Volume, million litres*	2010	2011	2012	2013	2014	% change
Total	**466**	**474**	**490**	**468**	**450**	**-3.7%**

Fruit juice (100% juice content)

		2010	2011	2012	2013	2014	% change
Total fruit juice		283	284	290	272	261	-4.1%
	Branded	153	157	165	149	145	-3.1%
	Private label	130	127	125	123	116	-5.3%
Ambient		217	208	203	185	170	-8.0%
	Branded	113	108	109	95	87	-7.8%
	Private label	104	100	94	90	83	-8.3%
From concentrate		217	208	203	185	168	-9.3%
	Branded	113	108	109	95	85	-10.1%
	Private label	104	100	94	90	82	-8.5%
Not from concentrate		0	0	0	0	2.4	0.0%
	Branded	0	0	0	0	2.2	0.0%
	Private label	0	0	0	0	0.2	0.0%
Chilled		67	76	86	87	91	4.1%
	Branded	40	50	56	55	57	4.9%
	Private label	26	27	30	33	34	2.8%
From concentrate		27	31	33	32	35	9.3%
	Branded	27	31	33	32	35	9.3%
Not from concentrate		40	46	54	55	56	1.1%
	Branded	14	19	23	23	23	-1.2%
	Private label	26	27	30	33	34	2.8%
of which are smoothies		2	2	2	3	3	6.9%
	Branded	2	2	2	3	3	6.9%

Nectars (25-99% juice content)

		2010	2011	2012	2013	2014	% change
Total nectars		183	190	200	195	190	-3.0%
	Branded	84	89	92	88	80	-8.8%
	Private label	99	101	108	108	110	1.7%
Ambient		136	142	153	149	146	-1.6%
	Branded	49	52	57	53	49	-7.4%
	Private label	87	90	96	95	97	1.6%
From concentrate		136	142	153	149	146	-1.6%
	Branded	49	52	57	53	49	-7.4%
	Private label	87	90	96	95	97	1.6%
Chilled		47	48	47	47	43	-7.4%
	Branded	36	36	35	34	31	-11.0%
	Private label	12	11	12	12	13	2.4%
From concentrate		47	48	47	47	43	-7.4%
	Branded	36	36	35	34	31	-11.0%
	Private label	12	11	12	12	13	2.4%

Poland

Population: **38.1 million**

Total fruit juice and nectars

Volume, million litres*	2010	2011	2012	2013	2014	% change
Total	**810**	**723**	**695**	**673**	**699**	**3.8%**

Fruit juice (100% juice content)

Total fruit juice	504	462	449	438	456	4.0%
Branded	434	400	391	382	396	3.8%
Private label	70	62	58	57	60	5.8%
Ambient	457	409	392	378	392	3.8%
Branded	391	351	338	326	338	3.7%
Private label	66	58	54	52	54	3.8%
From concentrate	453	405	383	365	371	1.8%
Branded	387	347	329	314	320	2.0%
Private label	66	58	54	51	51	1.0%
Not from concentrate	4	4	8	14	21	55.1%
Branded	4	4	8	12	18	50.0%
Private label	0	0	0	2	3	93.8%
Chilled	47	53	58	60	64	5.8%
Branded	43	49	54	56	58	3.9%
Private label	4	4	4	4	6	29.5%
From concentrate	9	9	10	9	9	-2.1%
Branded	9	9	10	9	9	-2.1%
Not from concentrate	38	44	48	51	55	7.3%
Branded	34	40	44	46	49	5.2%
Private label	4	4	4	4	6	29.5%
of which are smoothies	7	7	8	8	8	5.3%
Branded	7	7	8	8	8	5.3%

Nectars (25-99% juice content)

Total nectars	306	261	246	235	243	3.4%
Branded	202	160	148	142	147	3.5%
Private label	104	101	98	93	96	3.2%
Ambient	303	258	244	234	243	3.9%
Branded	199	157	146	141	147	4.3%
Private label	104	101	98	93	96	3.2%
From concentrate	303	258	244	234	243	3.9%
Branded	199	157	146	141	147	4.3%
Private label	104	101	98	93	96	3.2%
of which are smoothies	0.1	0.0	0.0	0.0	0.0	0.0%
Branded	0.1	0.0	0.0	0.0	0.0	0.0%
Chilled	3	2	2	1	0	-100.0%
Branded	3	2	2	1	0	-100.0%
From concentrate	3	2	2	1	0	-100.0%
Branded	3	2	2	1	0	-100.0%

Spain

Population: **46.5 million**

Total fruit juice and nectars

Volume, million litres*	2010	2011	2012	2013	2014	% change
Total	**1,097**	**1,068**	**1,046**	**985**	**968**	**-1.8%**

Fruit juice (100% juice content)

Total fruit juice	512	481	444	394	376	-4.7%
Branded	282	256	233	216	221	2.2%
Private label	229	225	211	178	155	-13.1%
Ambient	456	435	398	350	333	-4.9%
Branded	254	237	213	197	201	2.3%
Private label	203	199	185	153	132	-14.1%
From concentrate	393	363	323	273	253	-7.3%
Branded	226	203	179	162	161	-0.4%
Private label	167	160	144	111	91	-17.5%
Not from concentrate	64	72	74	77	80	3.9%
Branded	28	34	33	35	40	14.9%
Private label	36	39	41	42	40	-5.2%
Chilled	55	45	47	44	43	-3.2%
Branded	29	19	21	20	20	0.9%
Private label	27	26	26	25	23	-6.5%
From concentrate	29	19	13	7	4	-37.5%
Branded	9.5	0.4	0.6	0.4	0.1	-66.7%
Private label	20	19	13	7	4	-35.8%
Not from concentrate	26	26	33	37	38	3.3%
Branded	19	19	20	19	20	2.2%
Private label	7	7	13	18	19	4.5%

Nectars (25-99% juice content)

Total nectars	585	587	601	591	592	0.2%
Branded	384	374	372	359	365	1.7%
Private label	202	213	229	232	227	-2.2%
Ambient	583	586	600	590	590	0.0%
Branded	382	373	371	359	364	1.5%
Private label	201	212	229	232	227	-2.2%
From concentrate	582	585	600	590	590	0.0%
Branded	381	373	371	358	364	1.5%
Private label	201	212	229	232	227	-2.2%
Not from concentrate	0.4	0.3	0.3	0.3	0.2	-39.0%
Branded	0.4	0.3	0.3	0.3	0.2	-39.0%
Chilled	2.6	1.5	0.9	0.8	1.6	103.8%
Branded	1.8	0.7	0.5	0.5	1.4	170.0%
Private label	0.8	0.8	0.4	0.3	0.3	-6.7%
From concentrate	2.4	1.5	0.9	0.6	0.5	-20.0%
Branded	1.6	0.7	0.5	0.3	0.2	-33.3%
Private label	0.8	0.8	0.4	0.3	0.3	-6.7%
Not from concentrate	0.2	0.1	0.0	0.2	1.2	475.0%
Branded	0.2	0.1	0.0	0.2	1.2	475.0%
of which are smoothies	1.6	0.7	0.5	0.4	0.3	-15.4%
Branded	1.3	0.4	0.3	0.2	0.2	-25.0%
Private label	0.3	0.3	0.2	0.2	0.2	-5.3%

Sweden

Population: **9.7 million**

Total fruit juice and nectars

Volume, million litres*		2010	2011	2012	2013	2014	% change
Total		**257**	**252**	**244**	**238**	**233**	**-2.0%**

Fruit juice (100% juice content)

		2010	2011	2012	2013	2014	% change
Total fruit juice		201	197	190	183	175	-4.1%
	Branded	148	155	150	145	138	-4.4%
	Private label	54	42	40	38	37	-2.8%
Ambient		72	58	56	50	47	-7.0%
	Branded	30	28	27	26	25	-5.6%
	Private label	42	30	29	24	22	-8.6%
From concentrate		71	58	55	49	46	-7.8%
	Branded	29	28	26	25	23	-7.0%
	Private label	42	30	29	24	22	-8.6%
Not from concentrate		0.4	0.6	0.8	1.0	1.3	30.0%
	Branded	0.4	0.6	0.8	1.0	1.3	30.0%
of which are smoothies		0.4	0.6	0.8	1.0	1.3	30.0%
	Branded	0.4	0.6	0.8	1.0	1.3	30.0%
Chilled		129	139	134	133	129	-2.9%
	Branded	118	127	123	118	114	-4.2%
	Private label	12	12	11	14	15	7.4%
From concentrate		102	112	107	106	101	-4.2%
	Branded	93	102	99	95	89	-5.9%
	Private label	9	9	9	11	12	11.0%
Not from concentrate		27	27	27	27	27	2.0%
	Branded	25	25	24	23	24	2.9%
	Private label	2	2	3	3	3	-4.5%
of which are smoothies		2	2	2	1	1	-7.7%
	Branded	2	2	1	1	1	-12.0%
	Private label	0.1	0.2	0.2	0.2	0.2	27.4%

Nectars (25-99% juice content)

		2010	2011	2012	2013	2014	% change
Total nectars		55	55	54	55	58	5.0%
	Branded	37	39	38	39	43	11.1%
	Private label	19	16	15	16	14	-10.1%
Ambient		38	35	35	33	35	6.9%
	Branded	19	19	20	21	24	17.2%
	Private label	19	16	15	12	11	-10.2%
From concentrate		38	35	35	33	35	6.9%
	Branded	19	19	20	21	24	17.2%
	Private label	19	16	15	12	11	-10.2%
of which are smoothies		0.1	0.1	0.1	0.0	0.0	-10.5%
	Branded	0.0	0.0	0.0	0.0	0.0	-27.1%
	Private label	0.1	0.1	0.0	0.0	0.0	-9.4%
Chilled		17	20	19	22	22	2.0%
	Branded	17	20	19	18	19	4.2%
	Private label	0	0	0	3	3	-9.4%
From concentrate		17	20	19	22	22	2.0%
	Branded	17	20	19	18	19	4.2%
	Private label	0	0	0	3	3	-9.4%

UK

Population: **64.5 million**

Total fruit juice and nectars

Volume, million litres*		2010	2011	2012	2013	2014	% change
Total		**1,405**	**1,369**	**1,329**	**1,277**	**1,192**	**-6.6%**

Fruit juice (100% juice content)

		2010	2011	2012	2013	2014	% change
Total fruit juice		1,212	1,180	1,144	1,079	996	-7.7%
	Branded	482	509	519	506	484	-4.3%
	Private label	730	670	625	573	511	-10.8%
Ambient		551	503	458	402	358	-10.9%
	Branded	164	158	143	120	111	-7.1%
	Private label	386	346	314	282	247	-12.6%
From Concentrate		551	503	458	402	358	-10.9%
	Branded	164	158	143	120	111	-7.1%
	Private label	386	346	314	282	247	-12.6%
Chilled		661	676	687	677	637	-5.8%
	Branded	317	352	376	386	373	-3.4%
	Private label	344	325	311	291	264	-9.0%
From concentrate		285	269	258	241	221	-8.2%
	Branded	20	20	18	16	15	-7.2%
	Private label	264	249	239	225	206	-8.3%
Not from concentrate		377	407	429	436	416	-4.5%
	Branded	297	331	357	370	358	-3.2%
	Private label	80	76	71	65	58	-11.5%
of which are smoothies		59	67	58	54	52	-4.4%
	Branded	53	61	52	49	47	-4.4%
	Private label	6	6	5	5	5	-5.0%

Nectars (25-99% juice content)

		2010	2011	2012	2013	2014	% change
Total nectars		193	189	185	198	196	-0.8%
	Branded	175	169	163	177	177	-0.1%
	Private label	18	20	22	21	20	-6.8%
Ambient		149	149	141	138	133	-3.9%
	Branded	146	145	135	132	127	-3.5%
	Private label	3	4	6	6	6	-10.8%
From concentrate		146	146	138	136	130	-4.1%
	Branded	144	142	132	130	125	-3.7%
	Private label	3	4	6	6	6	-10.8%
Not from concentrate		2	2	2	2	3	6.6%
	Branded	2	2	2	2	3	6.6%
of which are smoothies		0	0	0	0	0	0.0%
	Branded	0	0	0	0	0	0.0%
Chilled		44	41	44	60	63	6.4%
	Branded	29	25	28	45	49	10.2%
	Private label	15	16	16	15	14	-5.1%
From concentrate		44	41	43	46	53	16.1%
	Branded	29	25	27	31	39	26.2%
	Private label	15	16	16	15	14	-5.1%
Not from concentrate		0	0	1	14	10	-25.3%
	Branded	0	0	1	14	10	-25.3%
of which are smoothies		16	16	18	19	23	24.1%
	Branded	10	10	12	13	17	36.5%
	Private label	7	7	7	6	6	-1.0%

Bulgaria

Population: **7.2 million**

Total fruit juice and nectars						
Volume, million litres*	**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total	**72**	**68**	**67**	**63**	**63**	**1.1%**
Fruit juice (100% juice content)						
Total fruit juice	18	16	16	14	14	1.5%
Private Label	1	1	2	2	2	0.3%
Branded	16	15	14	12	13	1.7%
Ambient	17	16	15	14	14	1.7%
Chilled	0.3	0.1	0.5	0.4	0.3	-6.9%
From concentrate	17	16	15	13	13	-4.4%
Not from concentrate	0.7	0.5	1.0	0.9	1.7	89.9%
Nectars (25-99% juice content)						
Total nectars	55	52	51	49	49	1.0%
Branded	47	44	42	41	41	1.8%
Private label	8	8	8	8	8	-3.0%

Croatia

Population: **4.3 million**

Total fruit juice and nectars						
Volume, million litres*	**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total	**74**	**71**	**68**	**67**	**58**	**-13.5%**
Fruit juice (100% juice content)						
Total fruit juice	11	12	12	12	13	7.6%
Private Label	9	9	9	10	11	7.4%
Branded	2	2	3	2	3	8.3%
Ambient	11	12	12	12	13	7.6%
From concentrate	11	12	12	12	11	-5.6%
Not from concentrate	0.0	0.0	0.0	0.4	1.9	454.3%
Nectars (25-99% juice content)						
Total nectars	63	60	57	55	45	-18.2%
Branded	49	46	46	46	38	-17.0%
Private label	14	13	10	9	7	-24.4%

Cyprus

Population: **1.2 million**

Total fruit juice and nectars						
Volume, million litres*	**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total	**32**	**31**	**32**	**30**	**28**	**-4.5%**
Fruit juice (100% juice content)						
Total fruit juice	21	20	21	19	18	-5.4%
Private Label	21	20	21	18	17	-5.6%
Branded	0	0	0	1	1	-3.6%
Ambient	21	19	20	18	17	-5.4%
Chilled	1	1	1	1	1	-7.2%
From concentrate	21	20	21	19	18	-5.4%
Not from concentrate	0	0	0	0	0	0.0%
Nectars (25-99% juice content)						
Total nectars	11	11	11	11	10	-2.9%
Branded	11	11	11	10	10	-3.0%
Private label	0	0	0	1	1	-1.7%

Czech Republic

Population: **10.6 million**

Total fruit juice and nectars						
Volume, million litres*	**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total	**105**	**88**	**82**	**89**	**94**	**5.4%**
Fruit juice (100% juice content)						
Total fruit juice	70	54	49	51	55	7.8%
Private Label	34	22	17	15	14	-2.7%
Branded	36	32	32	37	41	12.1%
Ambient	70	54	48	50	54	7.9%
Chilled	0.3	0.2	0.6	0.9	0.9	0.0%
From concentrate	70	54	48	48	51	6.5%
Not from concentrate	0.7	0.4	0.8	3.3	4.2	27.3%
Nectars (25-99% juice content)						
Total nectars	34	33	34	37	38	2.1%
Branded	23	20	22	27	28	5.6%
Private label	11	13	12	11	10	-6.6%

Denmark

Population: **5.6 million**

Total fruit juice and nectars						
Volume, million litres*	**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total	**119**	**114**	**111**	**111**	**108**	**-2.7%**
Fruit juice (100% juice content)						
Total fruit juice	119	113	110	110	104	-5.6%
Branded	59	54	57	54	53	-2.3%
Private Label	60	59	53	56	51	-8.7%
Ambient	106	101	99	98	91	-7.5%
Chilled	12	12	11	12	13	11.2%
From concentrate	111	105	102	101	94	-6.7%
Not from concentrate	8	8	8	9	10	7.2%
Nectars (25-99% juice content)						
Total nectars	0.9	0.8	0.9	0.9	4.0	357.1%
Branded	0.5	0.5	0.7	0.6	3.6	472.0%
Private label	0.4	0.3	0.2	0.3	0.4	70.0%

Estonia

Population: **1.3 million**

Total fruit juice and nectars						
Volume, million litres*	**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total	**32**	**29**	**27**	**26**	**25**	**-2.1%**
Fruit juice (100% juice content)						
Total fruit juice	14	12	12	12	12	1.1%
Branded	11	10	10	10	10	0.8%
Private Label	4	3	2	2	2	2.3%
Ambient	13	12	11	12	12	1.1%
Chilled	1	1	1	1	1	1.2%
From concentrate	13	12	11	11	11	1.3%
Not from concentrate	1	1	1	1	1	-1.5%
Nectars (25-99% juice content)						
Total nectars	18	17	15	14	13	-5.0%
Branded	16	16	15	13	12	-5.3%
Private label	2	1	1	1	1	1.9%

Finland

Population: **5.4 million**

Total fruit juice and nectars

Volume, million litres*	2010	2011	2012	2013	2014	% change
Total	**166**	**164**	**155**	**149**	**137**	**-7.9%**

Fruit juice (100% juice content)

Total fruit juice	145	144	135	129	119	-8.0%
Branded	128	127	119	114	105	-7.9%
Private Label	18	17	16	15	14	-9.5%
Ambient	95	93	80	77	70	-9.5%
Chilled	50	50	55	52	49	-5.9%
From concentrate	132	130	123	118	109	-7.6%
Not from concentrate	14	14	12	11	9	-12.8%

Nectars (25-99% juice content)

Total nectars	20	20	20	20	19	-7.0%
Branded	20	20	20	20	18	-7.1%
Private label	0.0	0.0	0.4	0.4	0.4	-1.8%

Greece

Population: **11.1 million**

Total fruit juice and nectars

Volume, million litres*	2010	2011	2012	2013	2014	% change
Total	**180**	**168**	**150**	**137**	**131**	**-4.1%**

Fruit juice (100% juice content)

Total fruit juice	123	107	93	82	77	-5.8%
Branded	105	90	74	65	62	-4.6%
Private Label	17	17	19	17	15	-10.6%
Ambient	88	79	72	65	61	-7.5%
Chilled	35	28	21	16	17	1.1%
From concentrate	122	107	93	82	77	-5.9%
Not from concentrate	0.2	0.0	0.1	0.1	0.2	26.2%

Nectars (25-99% juice content)

Total nectars	57	61	57	55	54	-1.6%
Branded	37	40	41	39	38	-3.8%
Private label	20	21	17	15	16	4.1%

Hungary

Population: **9.9 million**

Total fruit juice and nectars

Volume, million litres*	2010	2011	2012	2013	2014	% change
Total	**107**	**102**	**95**	**91**	**101**	**10.9%**

Fruit juice (100% juice content)

Total fruit juice	43	40	37	36	40	9.5%
Branded	25	25	26	27	28	3.6%
Private Label	17	15	12	9	12	26.2%
Ambient	42	40	37	36	40	9.5%
Chilled	0.1	0.0	0.0	0.0	0.0	40.0%
From concentrate	41	38	36	35	38	9.2%
Not from concentrate	1	2	2	1	1	20.6%

Nectars (25-99% juice content)

Total nectars	64	61	58	55	61	11.9%
Branded	45	41	34	34	36	4.9%
Private label	19	20	24	21	26	23.3%

Ireland

Population: **4.8 million**

Total fruit juice and nectars

Volume, million litres*	2010	2011	2012	2013	2014	% change
Total	**58**	**57**	**53**	**50**	**45**	**-10.9%**

Fruit juice (100% juice content)

Total fruit juice	52	50	47	44	39	-12.0%
Branded	29	29	26	26	21	-18.0%
Private Label	23	22	21	19	18	-3.7%
Ambient	33	31	27	25	21	-15.2%
Chilled	19	20	20	19	18	-7.9%
From concentrate	40	38	33	31	27	-11.9%
Not from concentrate	11	13	14	13	11	-12.3%

Nectars (25-99% juice content)

Total nectars	7	6	6	6	6	-2.0%
Branded	6	6	5	5	5	-4.4%
Private label	1	1	1	1	1	17.6%

Latvia

Population: **2.0 million**

Total fruit juice and nectars

Volume, million litres*	2010	2011	2012	2013	2014	% change
Total	**28**	**29**	**29**	**29**	**29**	**-0.5%**

Fruit juice (100% juice content)

Total fruit juice	11	10	10	11	11	0.4%
Branded	10	9	9	10	10	1.6%
Private Label	1	1	1	1	1	-16.1%
Ambient	11	9	10	10	10	0.9%
Chilled	0.2	0.3	0.3	0.2	0.2	-21.2%
From concentrate	11	10	10	10	10	0.5%
Not from concentrate	0.2	0.2	0.1	0.1	0.1	-11.9%

Nectars (25-99% juice content)

Total nectars	17	19	19	19	19	-1.0%
Branded	15	18	18	17	17	-0.1%
Private label	2	2	1	1	1	-11.7%

Lithuania

Population: **2.9 million**

Total fruit juice and nectars

Volume, million litres*	2010	2011	2012	2013	2014	% change
Total	**41**	**40**	**39**	**40**	**38**	**-5.3%**

Fruit juice (100% juice content)

Total fruit juice	16	14	14	14	14	2.0%
Branded	14	12	12	12	13	2.4%
Private Label	3	2	2	2	2	-1.3%
Ambient	16	14	14	14	14	2.0%
Chilled	0	0	0	0	0	100.0%
From concentrate	16	14	14	14	14	1.3%
Not from concentrate	0.2	0.3	0.3	0.3	0.4	34.5%

Nectars (25-99% juice content)

Total nectars	25	25	25	26	24	-9.2%
Branded	23	23	22	23	21	-9.8%
Private label	2	2	3	3	3	-4.2%

Luxembourg

Population: **0.5 million**

Total fruit juice and nectars						
Volume, million litres*	**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total	**11**	**11**	**11**	**11**	**10**	**-1.2%**

Fruit juice (100% juice content)

Total fruit juice	9	9	9	9	9	-1.5%
Branded	4	4	4	4	4	-2.1%
Private Label	5	5	5	5	5	-1.0%
Ambient	8	8	8	8	7	-3.0%
Chilled	1	1	1	1	1	10.1%
From concentrate	5	5	5	5	5	-3.0%
Not from concentrate	4	4	4	4	4	0.4%

Nectars (25-99% juice content)

Total nectars	2	2	2	2	2	0.0%
Branded	1	1	1	1	1	2.2%
Private label	1	1	1	1	1	-2.3%

Malta

Population: **0.4 million**

Total fruit juice and nectars						
Volume, million litres*	**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total	**11**	**13**	**12**	**12**	**14**	**13.5%**

Fruit juice (100% juice content)

Total fruit juice	6	6	5	5	5	1.5%
Branded	5	6	4	4	4	0.6%
Private Label	0.5	0.5	0.6	0.6	0.7	7.2%
Ambient	5	6	4	4	4	1.1%
Chilled	0.2	0.3	0.4	0.4	0.4	5.1%
From concentrate	6	6	5	5	5	1.5%
Not from concentrate	0	0	0	0	0	0.0%

Nectars (25-99% juice content)

Total nectars	6	6	7	7	9	21.4%
Branded	5	6	6	7	8	5.1%
Private label	0.4	0.7	0.9	1.1	1.2	14.8%

Norway

Population: **5.1 million**

Total fruit juice and nectars						
Volume, million litres*	**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total	**153**	**153**	**154**	**150**	**146**	**-2.7%**

Fruit juice (100% juice content)

Total fruit juice	138	138	141	138	135	-2.4%
Branded	84	84	72	67	66	-1.3%
Private Label	54	54	69	71	68	-3.4%
Ambient	84	82	78	71	66	-6.7%
Chilled	54	56	63	67	69	2.9%
From concentrate	115	113	112	104	99	-5.0%
Not from concentrate	23	25	29	34	36	5.6%

Nectars (25-99% juice content)

Total nectars	15	14	13	12	11	-6.1%
Branded	6	5	4	4	4	-8.8%
Private label	9	9	9	8	8	-4.7%

Portugal

Population: **10.6 million**

Total fruit juice and nectars						
Volume, million litres*	**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total	**116**	**105**	**102**	**104**	**104**	**0.3%**

Fruit juice (100% juice content)

Total fruit juice	27	24	23	20	19	-3.3%
Branded	12	9	8	8	8	-2.6%
Private Label	15	15	14	12	12	-3.7%
Ambient	24	22	21	18	18	-3.4%
Chilled	2	2	2	2	2	-2.0%
From concentrate	24	22	21	18	18	-3.4%
Not from concentrate	2	2	2	2	2	-2.0%

Nectars (25-99% juice content)

Total nectars	89	81	79	84	85	1.2%
Branded	63	56	52	56	58	4.3%
Private label	26	25	27	28	26	-5.2%

Romania

Population: **19.9 million**

Total fruit juice and nectars						
Volume, million litres*	**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total	**68**	**59**	**56**	**54**	**54**	**0.9%**

Fruit juice (100% juice content)

Total fruit juice	24	22	21	21	20	-1.1%
Branded	21	18	16	15	15	1.3%
Private Label	3	4	4	6	5	-7.4%
Ambient	24	22	21	21	20	-1.1%
From concentrate	24	21	20	19	18	-3.4%
Not from concentrate	0	1	1	1	2	28.6%

Nectars (25-99% juice content)

Total nectars	44	37	35	33	34	2.1%
Branded	37	30	27	26	26	0.3%
Private label	7	7	8	7	8	8.3%

Slovakia

Population: **5.4 million**

Total fruit juice and nectars						
Volume, million litres*	**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total	**47**	**39**	**36**	**34**	**38**	**9.0%**

Fruit juice (100% juice content)

Total fruit juice	27	21	20	19	22	17.4%
Private Label	14	10	9	7	8	18.2%
Branded	14	11	12	12	15	16.9%
Ambient	27	21	19	18	20	14.1%
Ambient	0.2	0.7	0.9	1.3	2.1	61.5%
Ambient	27	21	19	18	20	14.1%
Not from concentrate	0.4	0.7	0.9	1.3	2.1	61.5%

Nectars (25-99% juice content)

Total nectars	20	18	16	15	15	-1.3%
Branded	13	12	11	11	11	3.7%
Private label	7	6	5	5	4	-13.3%

Slovenia

Population: **2.1 million**

Total fruit juice and nectars							
Volume, million litres*		**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total		**41**	**39**	**36**	**33**	**30**	**-9.2%**
Fruit juice (100% juice content)							
Total fruit juice		13	13	13	13	12	-5.4%
	Branded	7	6	6	5	5	1.9%
	Private Label	6	7	8	8	7	-10.4%
Ambient		13	13	13	13	12	-5.4%
From concentrate		13	13	13	13	12	-5.4%
Nectars (25-99% juice content)							
Total nectars		28	26	23	20	17	-11.7%
	Branded	17	15	13	11	10	-9.7%
	Private label	12	11	10	8	7	-14.3%

Switzerland

Population: **8.2 million**

Total fruit juice and nectars							
Volume, million litres*		**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total		**204**	**201**	**197**	**196**	**194**	**-1.2%**
Fruit juice (100% juice content)							
Total fruit juice		155	153	150	150	148	-1.3%
	Branded	85	83	79	78	77	-0.5%
	Private Label	70	70	72	72	70	-2.2%
Ambient		141	138	134	133	131	-1.9%
Chilled		14	15	16	16	17	2.8%
From concentrate		140	137	133	131	129	-1.8%
Not from concentrate		15	16	18	18	19	2.2%
Nectars (25-99% juice content)							
Total nectars		49	49	47	46	46	-0.6%
	Branded	16	17	15	14	14	1.6%
	Private label	33	32	32	32	32	-1.5%

Turkey

Population: **76.9 million**

Total fruit juice and nectars							
Volume, million litres*		**2010**	**2011**	**2012**	**2013**	**2014**	**% change**
Total		**624**	**678**	**632**	**658**	**705**	**7.1%**
Fruit juice (100% juice content)							
Total fruit juice		50	53	51	51	52	3.2%
	Branded	46	48	47	46	48	3.2%
	Private Label	4	5	5	4	5	3.4%
Ambient		47	50	47	46	47	2.4%
Chilled		3	4	4	5	5	11.2%
From concentrate		41	44	42	42	43	1.9%
Not from concentrate		10	10	9	9	10	9.7%
Nectars (25-99% juice content)							
Total nectars		574	625	581	607	652	7.4%
	Branded	507	544	505	528	570	7.9%
	Private label	67	80	76	79	82	4.0%

Definitions

canadean

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.

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.
FJN: Fruit juice and nectars

AIJN Report Methodology

Within the beverage industry, Canadean is recognised as the beverage information specialist and has been commissioned to produce the 2015 AIJN European Fruit Juice Market Report.

All data and analysis in the report has been produced using Canadean's in-depth beverage market database and our latest Annual 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.

Acknowledgements
Canadean would like to thank the AIJN and the European juice and nectars industry for their help and support during the research process.

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 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** juices as nutritious products which are an integral part of a healthy diet, through the AIJN Juice Marketing Campaign;
4. **Encourage and support**, through the Fruit Juice CSR Platform, juice companies to integrate corporate social responsibility in all stages in their supply chain;
5. **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;
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 16 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, Marjan Skotnicki-Hoogland, Managing Director, FrieslandCampina Riedel B.V., Netherlands
1st Vice-President, Jörgen Dirksen, CEO, Rynkeby Foods A/S, Denmark
2nd Vice-President, Angel Sanchez, Director General, Conserve Italia, Italy
Members, Bruno Thévenin, CEO PepsiCo, France; Thomas MERTENS, Managing Director Supply Chain, Wesergold Getränkeindustrie GmbH & Co. KG, Germany; Piotr Podoba, CEO, Döhler Sp. z o.o., Poland; Wolfgang Schwald, General Manager Fruit, Processing & Sales, Rauch Fruchtsäfte GmbH & Co OG, Austria; Bruno Van Gompel, Technical Director, Coca-Cola Western Europe, Belgium; Helmuth Brandstaetter, CEO Zipperle AG, Italy; José Jordão, Executive Director, Sumol+Compal, Portugal; David Saint, Managing Director, Refresco Gerber UK Limited, United Kingdom.

National Associations Members of AIJN

Austria: Verband der Österreichischen Fruchtsaft - und Fruchtsirupindustrie
Belgium: AJUNEC
Cyprus: The Cyprus Canners & Fruit Juice Manufacturers Association
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
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. Current Observer members:

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