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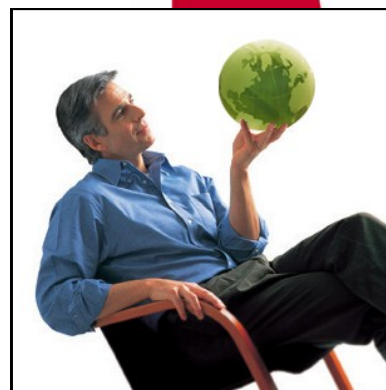
**International
Markets
Bureau**

MARKET INDICATOR REPORT | NOVEMBER 2011

Fruit Juices and Fruit Snacks in Western Europe



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► CONSUMER TRENDS

- ▶ Across Western Europe, on a per-capita basis, individuals in the Netherlands consume the most fruit/vegetable juices, and individuals in Turkey consume the most fruit snacks in volume terms. However, value-wise, consumers in Norway spend the most on both fruit/vegetable juices and fruit snacks per capita.
- ▶ In 2010, The United Kingdom was the largest Western European market for fruit juices and fruit snacks, valued at just over US\$4 billion. Germany and France were the next largest markets, with values of approximately US\$3.9 billion and US\$2.8 billion, respectively.
- ▶ From 2005 to 2010, several Western European countries have seen declining volume sales for fruit/vegetable juices, Germany being the most significant. Other markets with declines included Austria, Ireland, Finland and the United Kingdom (U.K.). The German market is expected to continue to decline, along with Ireland, Austria and Greece from 2011 to 2015. However, countries such as the Netherlands, Turkey, France, and Spain will achieve healthy volume growth over the forecast period.
- ▶ In value terms, fruit/vegetable juice sales are expected to achieve healthy growth rates for most of Western Europe from 2011 to 2015. The total Western European market is expected to grow 12.6% from 2011 to 2015.
- ▶ From 2005 to 2010, only Finland and France saw declines in fruit snack volume sales. From 2011 to 2015, all Western European markets are expected to see growth in the fruit snack market, in both volume and value terms.
- ▶ There are already significant markets in this region for fortified/functional juices. Markets for organic and reduced sugar fruit/vegetable juices, as well as organic fruit snacks, are growing.
- ▶ Private label has established major gains in the Western European fruit/vegetable juice and fruit snacks market. When analyzing new product introductions in the Western European market from January 2011 to July 2011 within this category, around 26% of product launches were private label. The popularity of discount grocery retailers in main Western European markets has helped sales of both new and existing private label products.
- ▶ Claims regarding low/no/reduced sugar, no additives/preservatives and organic are all very popular product characteristics in this developed market.
- ▶ Retail sales of fruit/vegetable juices are the highest in hypermarkets and supermarkets. Grocery retailers in Western Europe with the highest retail sales include: Carrefour, Auchan, Tesco, the Metro Group, and the Schwarz Group. The Metro Group, however, mostly relies on its cash and carry outlets that cater to the restaurant, hotel and institutions segment.

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► RETAIL SALES

- In 2010, sales of fruit juice and fruit snacks reached US\$19.4 billion in Western Europe.
- Fruit snacks include dried fruits that usually come in pouches. Chocolate-coated dried fruits are not covered in this section, however, yogurt-covered dried fruits are included. The fruit/vegetable juice category includes frozen juices, but does not include carbonated juices. Juice drinks with a high amount of milk ingredients are excluded, as well as fruit shakes. Of Western European countries, only Turkey has a market for fruit-flavoured drinks. It is important to note that Western European countries have varying preferences regarding different juice flavours, formats (chilled, frozen or ambient), and categories (100% juice, less than 25% juice, etc), which affects product popularity.

Market Sizes of Fruit Snacks and Fruit/Vegetable Juice in Western Europe Retail Value in US\$ millions – Current Prices

Categories	2005	2006	2007	2008	2009	2010
Fruit Snacks	958.0	1,054.7	1,124.2	1,184.1	1,234.8	1,281.9
100% Juice	9,765.3	10,293.2	10,697.1	10,687.6	10,395.4	10,330.9
Juice Drinks (up to 24% Juice)	3,766.4	3,744.8	3,757.7	3,778.5	3,886.8	3,972.3
Nectars (25-99% Juice)	3,071.6	3,257.7	3,441.9	3,491.6	3,581.4	3,686.1
Fruit-Flavoured Drinks (No Juice Content)	97.2	96.3	95.4	102.4	110.9	119.1
Total Juice	16,700.5	17,392.0	17,992.1	18,060.1	17,974.5	18,108.4
Total Fruit Snacks and Juice	17,658.5	18,446.7	19,116.3	19,244.2	19,209.3	19,390.3

Source: Euromonitor, 2011. **Note:** Includes sales of vegetable juices and frozen juices

- The U.K. is the largest Western European market for fruit/vegetable juices and fruit snacks. However, the fastest-growing market is the Netherlands, with an expected growth of 29.7% in value sales from 2011 to 2015. France is currently the third-largest market, and is also expected to be the third-fastest growing market.

Market Sizes of Fruit Snacks and Fruit/Vegetable Juice in Western Europe by Country Forecast Retail Value in US\$ millions – Current Prices

Country	2011	2012	2013	2014	2015	2011-2015 % Growth
Western Europe	19,781.2	20,263.8	20,870.0	21,550.5	22,277.0	12.6
United Kingdom	4,046.8	4,118.9	4,231.6	4,370.0	4,518.8	11.7
Germany	3,907.8	3,827.1	3,797.3	3,758.2	3,725.7	-4.7
France	3,052.0	3,203.9	3,360.8	3,540.0	3,722.6	22.0
Italy	1,488.2	1,538.6	1,594.2	1,656.4	1,725.5	15.9
Netherlands	1,160.3	1,238.3	1,317.9	1,406.6	1,504.6	29.7
Spain	1,090.3	1,120.7	1,159.5	1,205.5	1,256.7	15.3
Turkey	1,083.3	1,166.5	1,251.4	1,340.8	1,430.8	32.1
Sweden	645.4	675.1	703.0	730.9	753.0	16.7
Belgium	490.4	504.5	520.7	536.7	552.3	12.6
Norway	439.6	457.0	473.8	491.3	509.7	15.9
Switzerland	416.2	429.1	441.7	454.1	471.6	13.3
Finland	384.3	394.0	403.8	413.2	422.3	9.9
Denmark	330.7	341.6	355.7	370.5	384.6	16.3
Ireland	319.9	314.3	310.5	308.6	308.1	-3.7
Austria	287.2	291.1	295.7	301.1	307.3	7.0
Portugal	286.0	292.3	298.6	305.1	312.0	9.1
Greece	284.5	280.2	280.7	285.4	292.6	2.9

Source: Euromonitor, 2011



► HEALTH AND WELLNESS FRUIT JUICE AND FRUIT SNACK PRODUCTS

- The health and wellness fruit/vegetable juice and fruit snacks market, represents approximately 18.8% of the total fruit/vegetable and fruit snacks market in Western Europe. The U.K. is the most popular market for health and wellness fruit/vegetable juices and fruit snacks. In 2010, it held 22.6% of the region's health and wellness fruit/vegetable juice and fruit snack market. Germany and Italy are the second- and third-largest markets for these health and wellness products.

Market Sizes of Health and Wellness Fruit/Vegetable Juice and Fruit Snacks in Western Europe Retail Value in US\$ millions – Current Prices

Categories	2005	2006	2007	2008	2009	2010
FF* Fruit/Vegetable Juice	2,242.0	2,383.7	2,686.5	2,853.9	2,686.3	2,640.8
Organic Fruit/Vegetable Juice	298.7	344.0	421.8	466.3	431.8	434.2
Reduced Sugar Fruit/Vegetable Juice	457.9	512.6	585.5	615.8	565.0	553.5
Total Juice	2,998.6	3,240.3	3,693.8	3,936.0	3,683.1	3,628.5
Organic Fruit Snacks	20.8	24.2	27.9	30.5	28.6	28.7
Total Juice and Fruit Snacks	3,019.4	3,264.5	3,721.7	3,966.5	3,711.7	3,657.2

Source: Euromonitor, 2011. *Note: FF = fortified functional

► BRAND AND COMPANY SHARES

- In 2009, private label producers held 28.6% of the fruit/vegetable juices market in Western Europe. Tropicana was the leading brand for fruit/vegetable juices in Western Europe in 2010, with a 5.5% share.
- A list of leading companies and brands for fruit snacks in Western Europe is currently unavailable. However, according to Euromonitor, the leading company in Western Europe for fruit snacks is Sundora Foods.

Top 10 Brand Shares (by Global Brand Name) of Fruit/Vegetable Juices in Western Europe Retail Value – % Breakdown

Brand	Company name (GBO)	2006	2007	2008	2009	2010
Tropicana	PepsiCo Inc	4.9	5.6	5.8	5.5	5.5
Oasis	Suntory Holdings Ltd	-	-	-	1.9	2.1
Capri-Sonne	Wild GmbH & Co KG, Rudolf	1.7	1.8	1.9	1.9	2.0
Hohes C	Eckes AG	1.8	1.8	1.9	1.9	1.8
Joker	Eckes AG	1.4	1.4	1.5	1.6	1.6
Granini	Eckes AG	1.6	1.6	1.6	1.6	1.6
Sunny Delight	Sunny Delight Beverages Co	1.3	1.3	1.3	1.3	1.3
Punica	PepsiCo Inc	1.1	1.0	1.1	1.1	1.2
Albi	Albi GmbH & Co	1.2	1.1	1.2	1.1	1.1
Santàl	Parmalat Group	0.9	0.9	1.0	1.0	1.0
Private label	Private Label	28.9	28.1	28.2	28.4	28.6

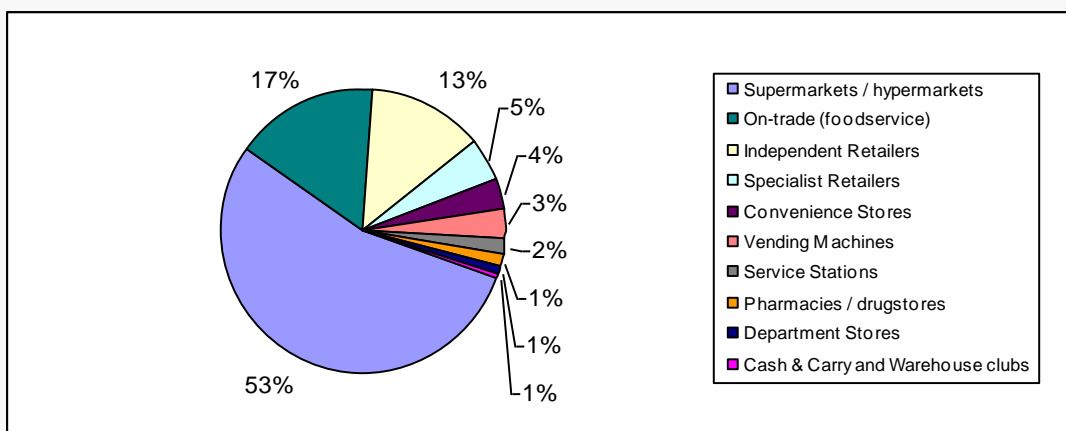
Source: Euromonitor, 2011. Note: Brand shares only include fruit/vegetable juices and frozen juice, not fruit snacks.



► DISTRIBUTION CHANNELS

- Distribution shares on the fruit snacks market for Western Europe are unavailable. However, a study on distribution channels for nuts and seeds in Western Europe has shown that 50.3% of these products were sold in supermarkets/hypermarkets in Western Europe in 2009. A total of 23.3% were sold in independent retailers, 16.3% in convenience stores, 5.6% in specialist retailers, 3.4% in service stations, and 0.2% in pharmacies/drugstores.

**Distribution Shares of Fruit/Vegetable Juices in Western Europe
Retail Volume % in 2009**



Source: Datamonitor, 2010

► NEW PRODUCTS

- The following are three examples of new fruit juice and fruit snacks products entering the Western European market within the past year, from Mintel Global New Products Database (2011).



Dried Cranberries
Country: Germany
Company: Netto-Marken
Discount
Price: US\$2.77



Nordic Smoothie
Country: Norway, Germany
and the Netherlands
Company: Chiquita
Price: US\$3.48



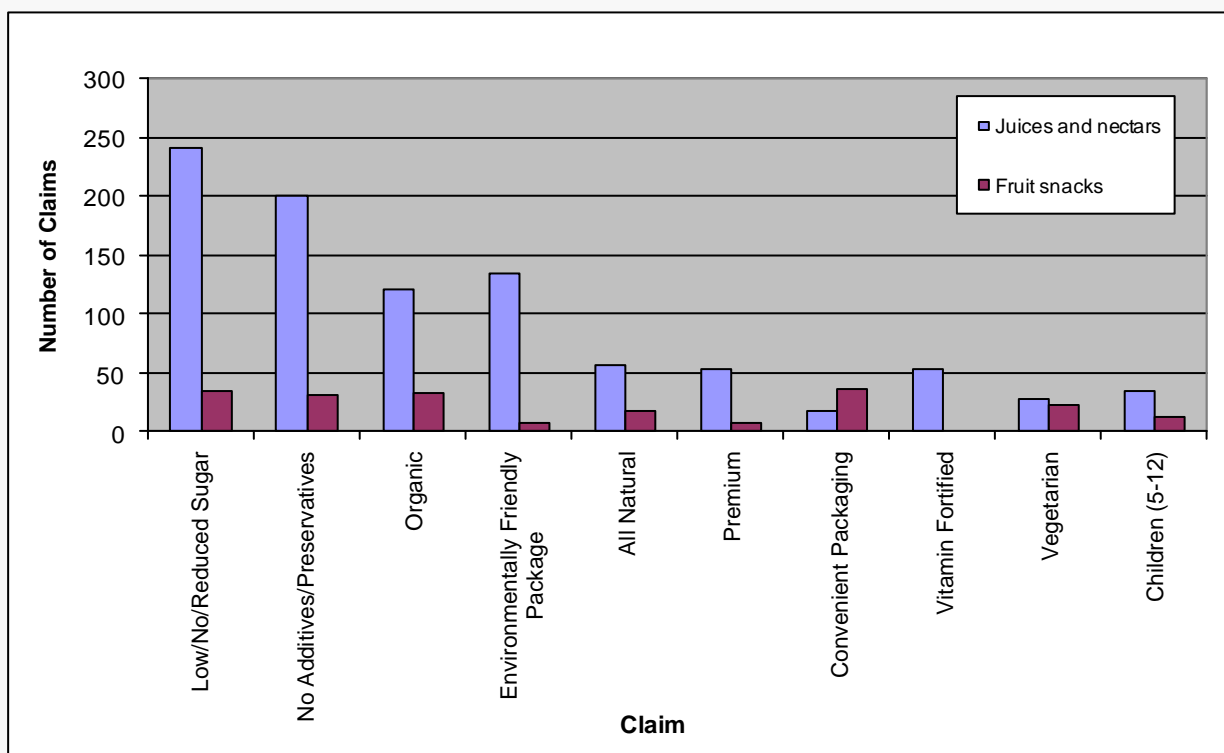
Dried Blueberries
Country: Germany
Company: Bolasco Import
(Trader Joe's)
Price: US\$2.83



► NEW PRODUCTS (CONTINUED)

- A total of 911 new fruit/vegetable juice and fruit snack products entered the market in Western Europe from January 2011 to July 2011.
- The U.K. was the most active country in Western Europe, accounting for 17% of the region's new product launches in this category, followed by Germany (16%), France (14%), Italy (10%), and Spain (9%).
- From January 2011 to July 2011, the low/no/reduced sugar claim was the most popular for fruit/vegetable juices and nectars. The most popular product claim for fruit snacks was convenient packaging.

**New Western Europe Product Introductions in Fruit/Vegetable Juices and Fruit Snacks
January 2011 to July 2011 – By Claims**



Source: Euromonitor, 2011. **Note:** Fruit/vegetable juices only include 100% juice, nectars and some juice drinks (all non-frozen)

- Some of the top companies with fruit/vegetable juice and snacks product introductions include Lidl's private label brand with 25 product introductions from January 2011 to July 2011, followed by Tropicana and Asda, both with 22.



▶ TRADE DATA

- ▶ The EU27 imported around US\$440.4 million worth of dried fruits (not including dried bananas, coconut, citrus fruits, grapes, dates, pineapples, mangoes, papayas, or figs) from countries outside of the EU27 in 2010. Canada's share of this market was US\$1.7 million.
- ▶ According to Global Trade Atlas, Canada exports mostly frozen fruits, not dried fruits, to the world. In 2010, Canada exported US\$119.7 million worth of frozen blueberries to the world.
- ▶ The frozen fruit market in Western Europe reached US\$613.4 million in 2010. Permira is the leading company in the frozen fruit category, with an 18.9% market share in 2009.
- ▶ The EU27 imported around US\$2.3 billion worth of fruit and vegetable juices from outside of the EU27 in 2010. Canada's share of this market was around US\$9.6 million.

EU27 (External Trade) Imports from the World Commodity 0813: Fruits, Dried (Not Including Dried Citrus Fruits, Bananas, Nuts, Grapes, Coconut and Others)						
Partner Country	CAD \$			% Share		
	2008	2009	2010	2008	2009	2010
World	484,018,553	454,964,386	440,357,210	100	100	100
Turkey	177,624,293	157,891,226	173,665,237	36.7	34.7	39.44
Chile	98,864,596	89,407,488	85,958,934	20.43	19.65	19.52
United States	105,507,568	99,760,173	76,448,703	21.8	21.93	17.36
China	44,980,985	50,433,438	58,064,328	9.29	11.09	13.19
Argentina	19,802,983	24,469,185	14,040,932	4.09	5.38	3.19
Thailand	5,965,497	5,209,925	5,382,081	1.23	1.15	1.22
South Africa	3,232,328	3,876,748	4,426,496	0.67	0.85	1.01
India	2,773,830	3,617,099	3,277,244	0.57	0.8	0.74
Serbia	4,077,216	3,704,595	3,105,145	0.84	0.81	0.71
Albania	2,798,742	1,748,353	1,706,309	0.58	0.38	0.39
Canada	1,353,715	2,287,527	1,684,972	0.28	0.5	0.38

Source: Global Trade Atlas, 2011

EU27 (External Trade) Imports from the World Commodity 2009: Fruit (including grape) & Vegetable Juices, Unfermented, Not Containing Spirits, Whether or Not Sweetened						
Partner Country	CAD \$			% Share		
	2008	2009	2010	2008	2009	2010
World	2,789,325,810	2,468,339,426	2,273,572,943	100	100	100
Brazil	1,400,678,659	1,273,102,618	1,046,060,577	50.22	51.58	46.01
United States	108,666,698	123,280,157	121,667,456	3.9	4.99	5.35
Turkey	107,959,416	70,566,509	121,554,484	3.87	2.86	5.35
Thailand	96,202,242	112,926,178	120,163,959	3.45	4.57	5.29
Costa Rica	85,334,771	112,735,192	111,439,476	3.06	4.57	4.9
China	301,607,038	167,491,221	107,651,510	10.81	6.79	4.73
Argentina	78,544,055	91,339,174	92,117,161	2.82	3.7	4.05
Israel	96,968,012	77,880,707	82,461,737	3.48	3.16	3.63
Ecuador	45,637,273	68,002,162	54,540,296	1.64	2.75	2.4
Mexico	47,332,310	57,665,910	53,884,480	1.7	2.34	2.37
Canada	8,828,521	11,469,515	9,582,931	0.32	0.46	0.42

Source: Global Trade Atlas, 2011

The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada assumes no liability for any actions taken based on the information contained herein.

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Aussi disponible en français sous le titre :

Jus de fruits et collations aux fruits en Europe occidentale

Canada 