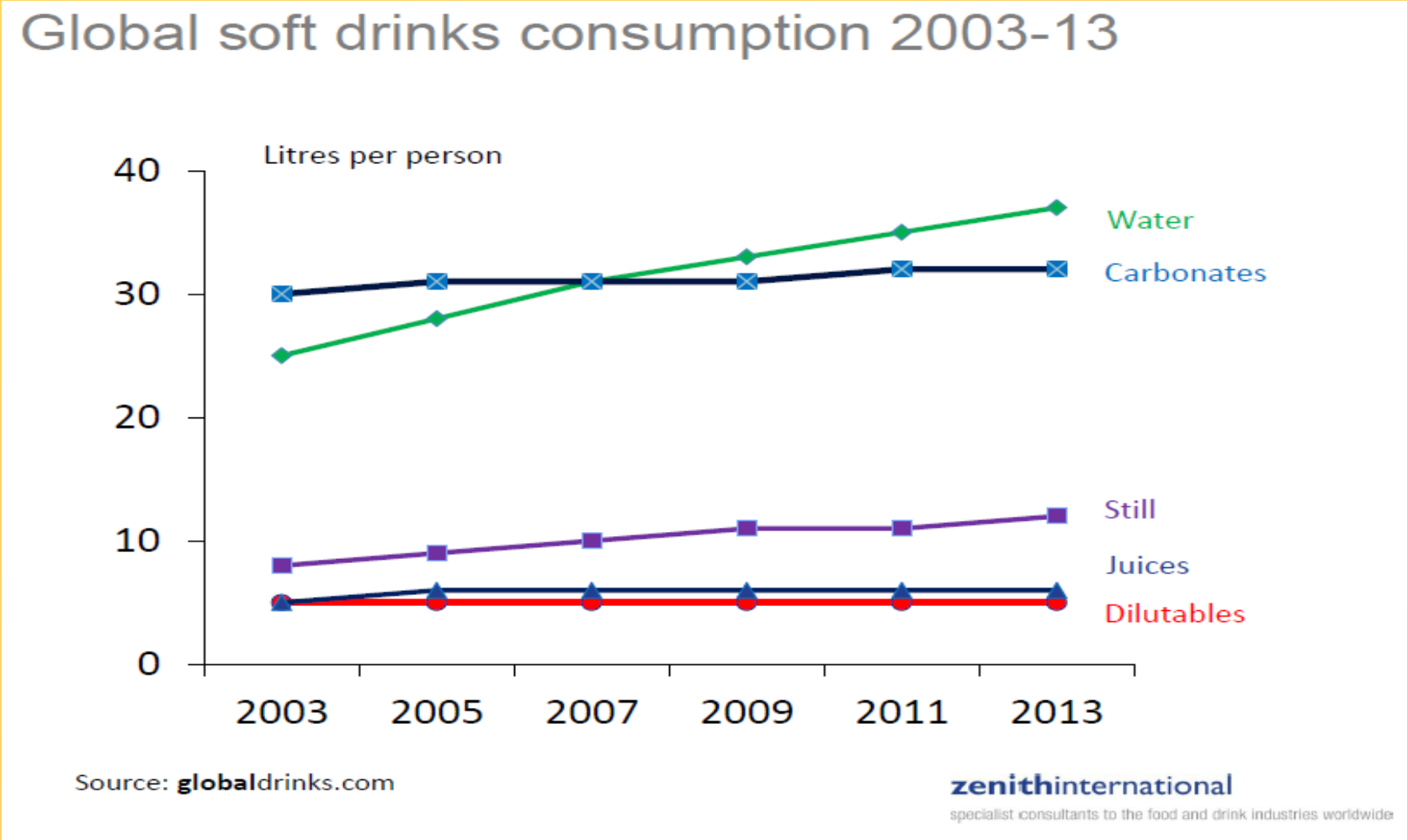
A Snapshot of the German and UK juice market

- Introduction of Carrière
- Global Soft Drinks Consumption by Categories
- UK - Market size and forecast (value/volume)
- UK – Consumer Behaviour
- Germany - key features
- Conclusions

Introduction of Carrière

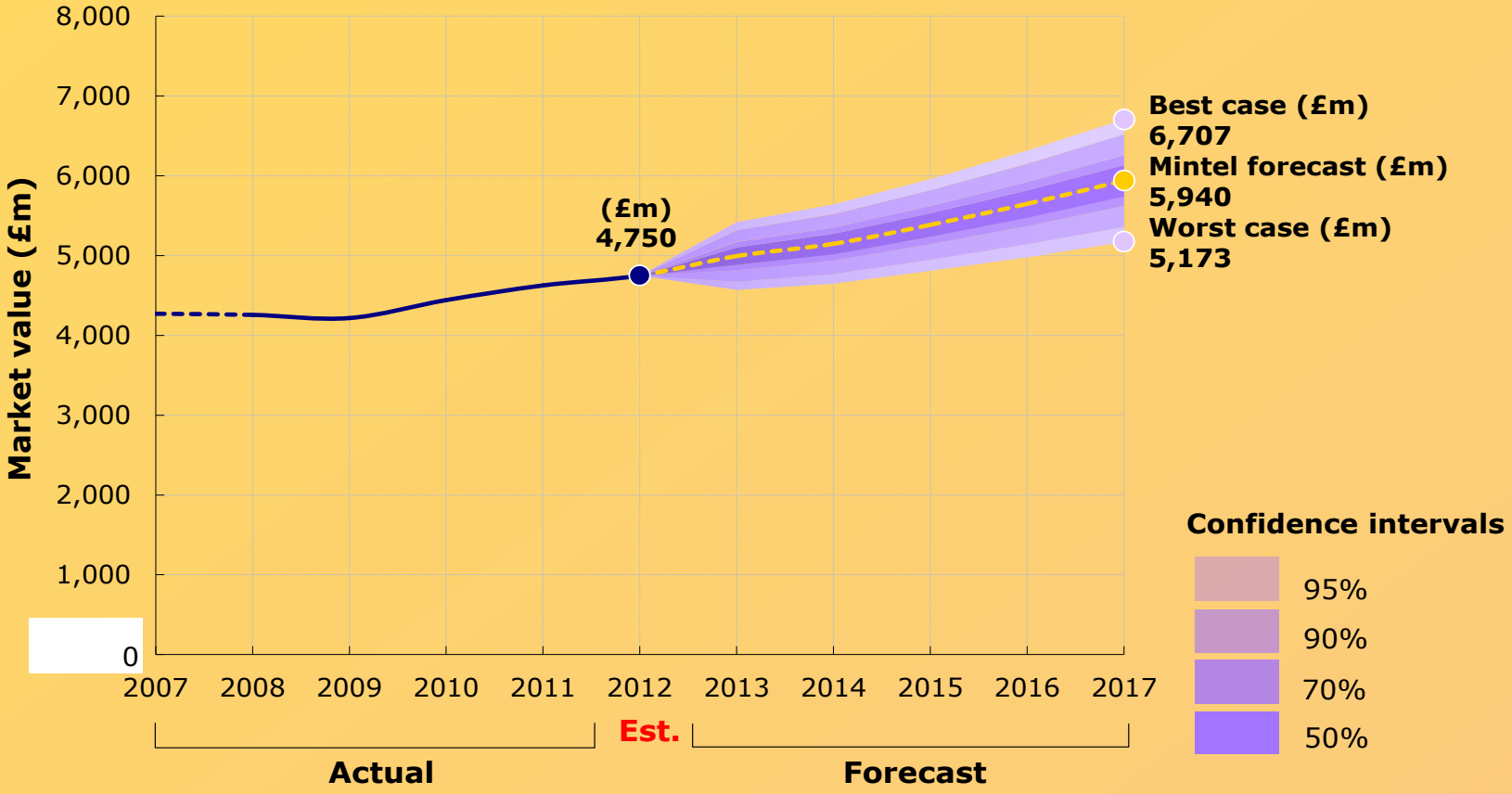
- Based in Hamburg / Germany
- Trading mainly with citrus, tropical and exotic products
- Focussed on 4 growth pillars: Conventional , Organic, Fairtrade, Derivates [water phases, natural aromas, oils, etc.]
- Specialised in product sourcing; global supplier network
- Strong customer base in Europe
- World Juice 2006 Innovation Award - Hero´s Fruit 2Day®, developed in conjunction with Carrière
- For more information: www.carriere.de

Soft drinks consumption by categories



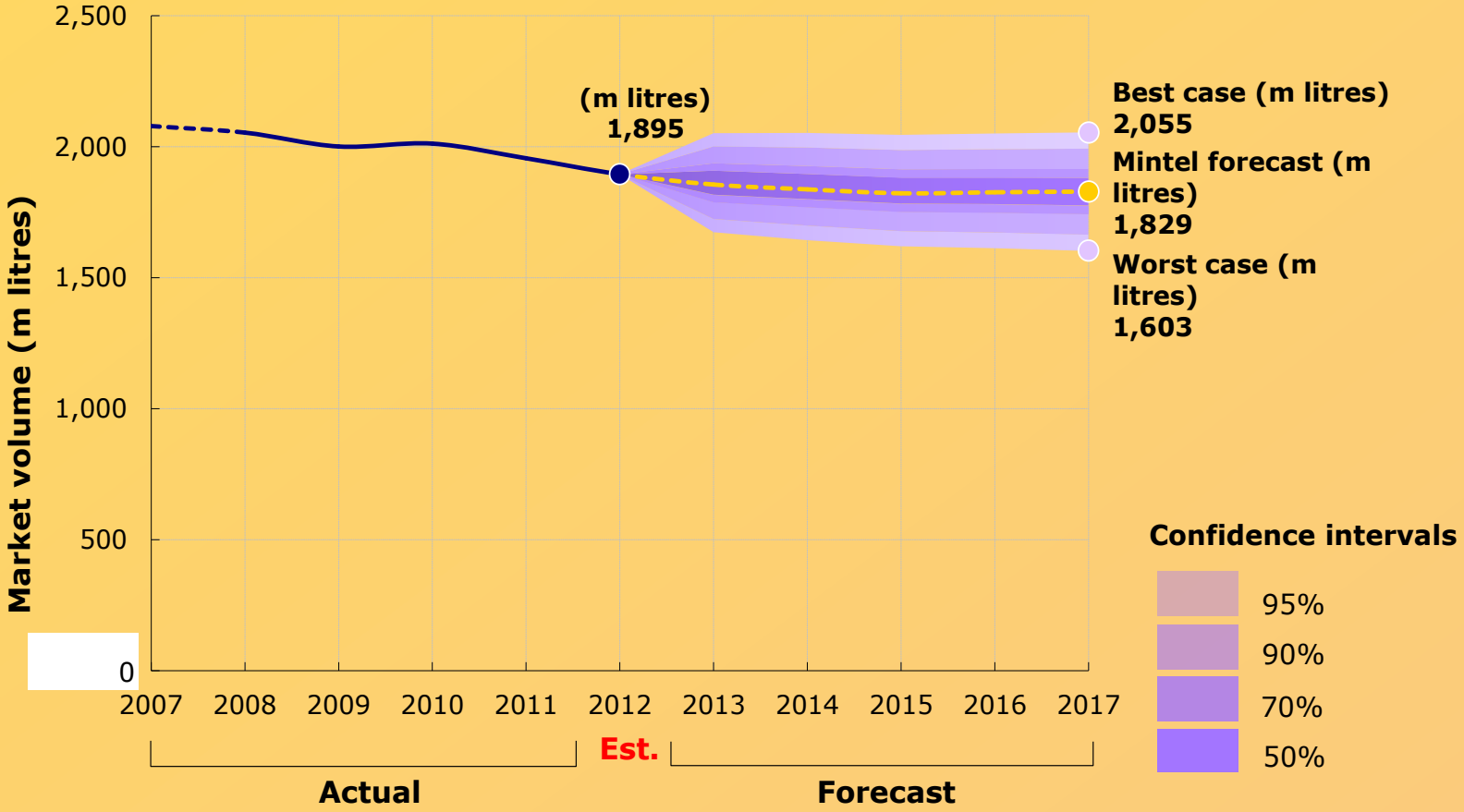
United Kingdom

Market size and forecast for value sales of fruit juice, juice drinks and smoothies, 2007-17



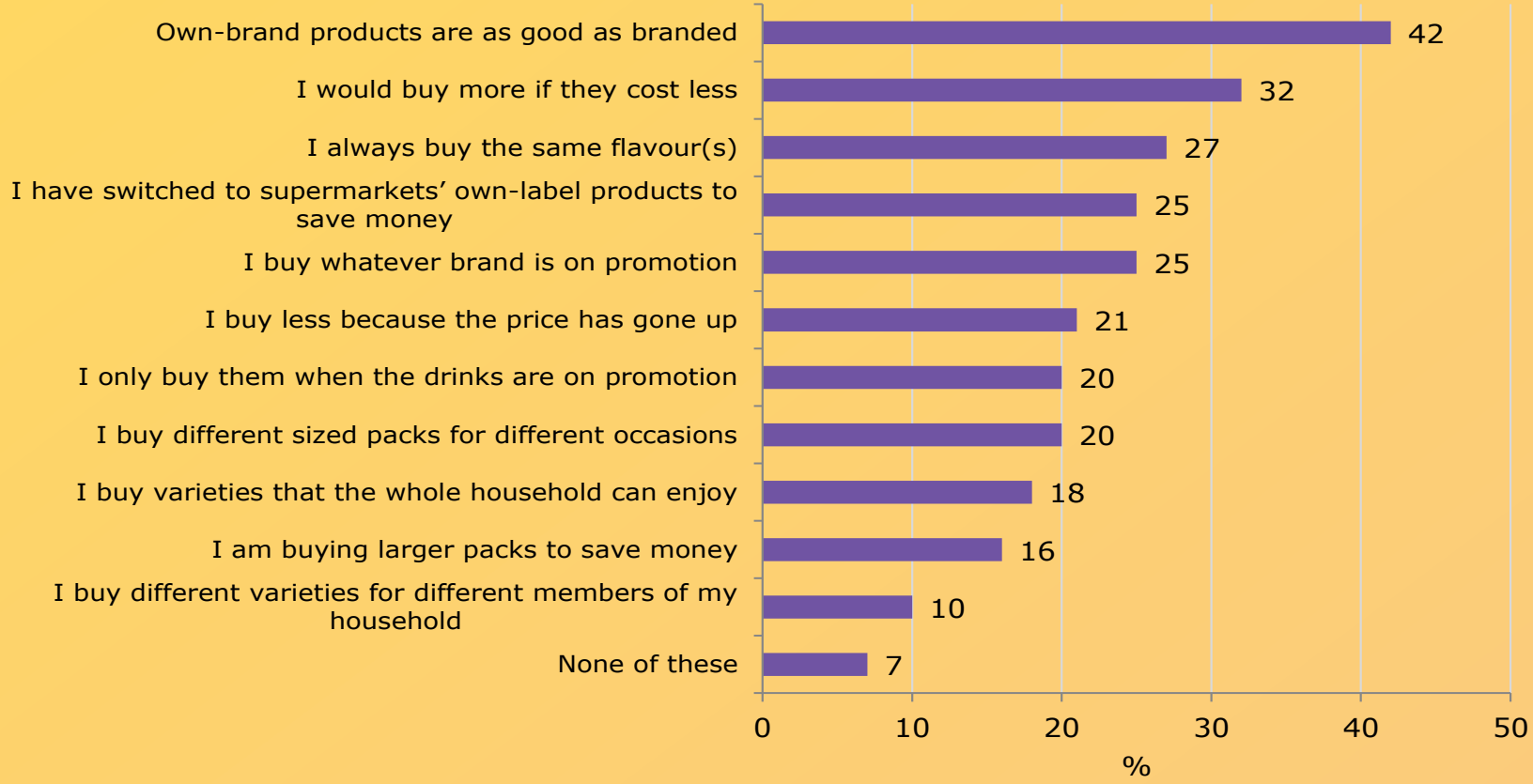
United Kingdom

Market size and forecast for volume sales of fruit juice, juice drinks and smoothies, 2007-17



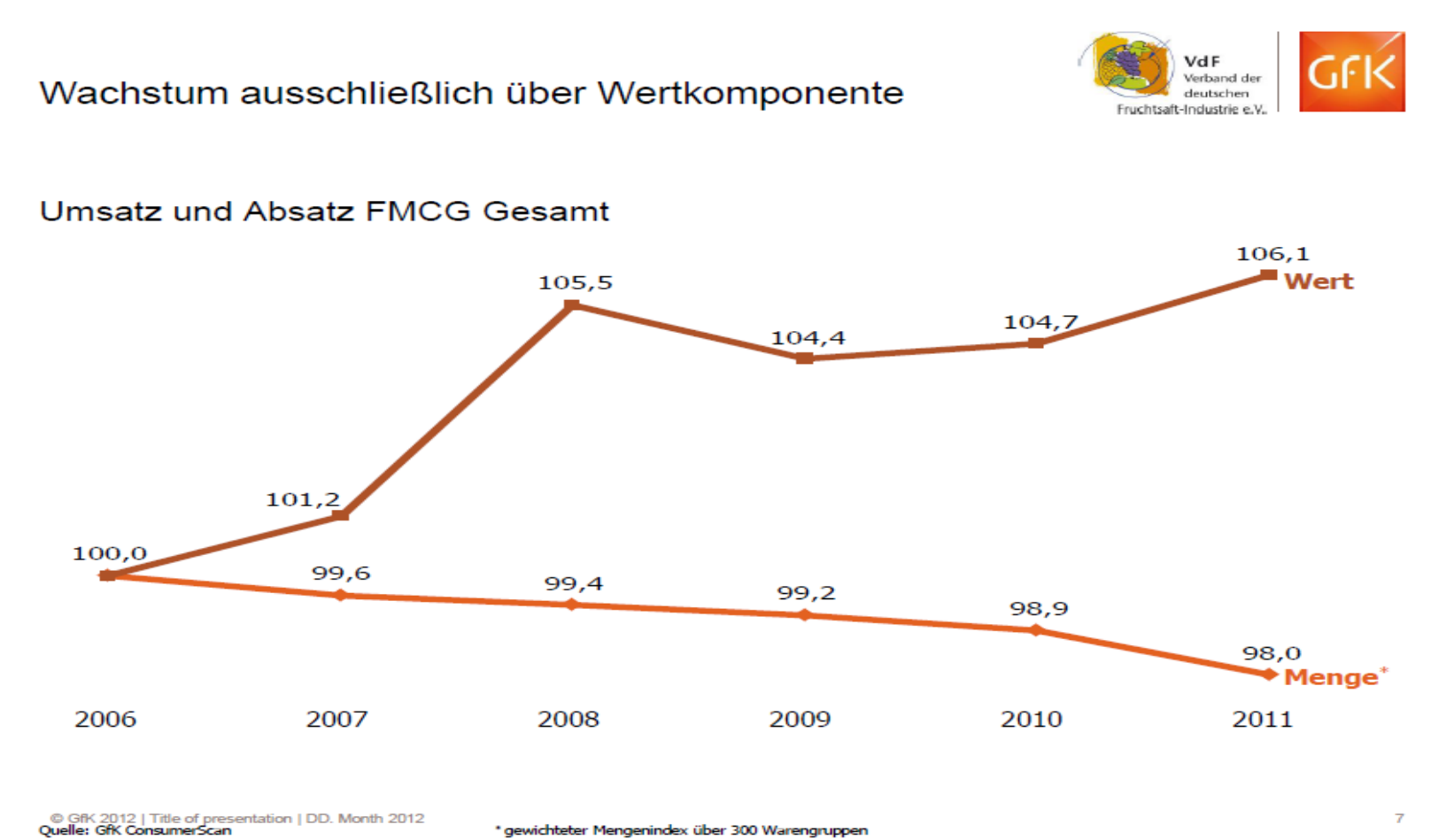
United Kingdom

Consumer behaviour – attitudes towards purchasing

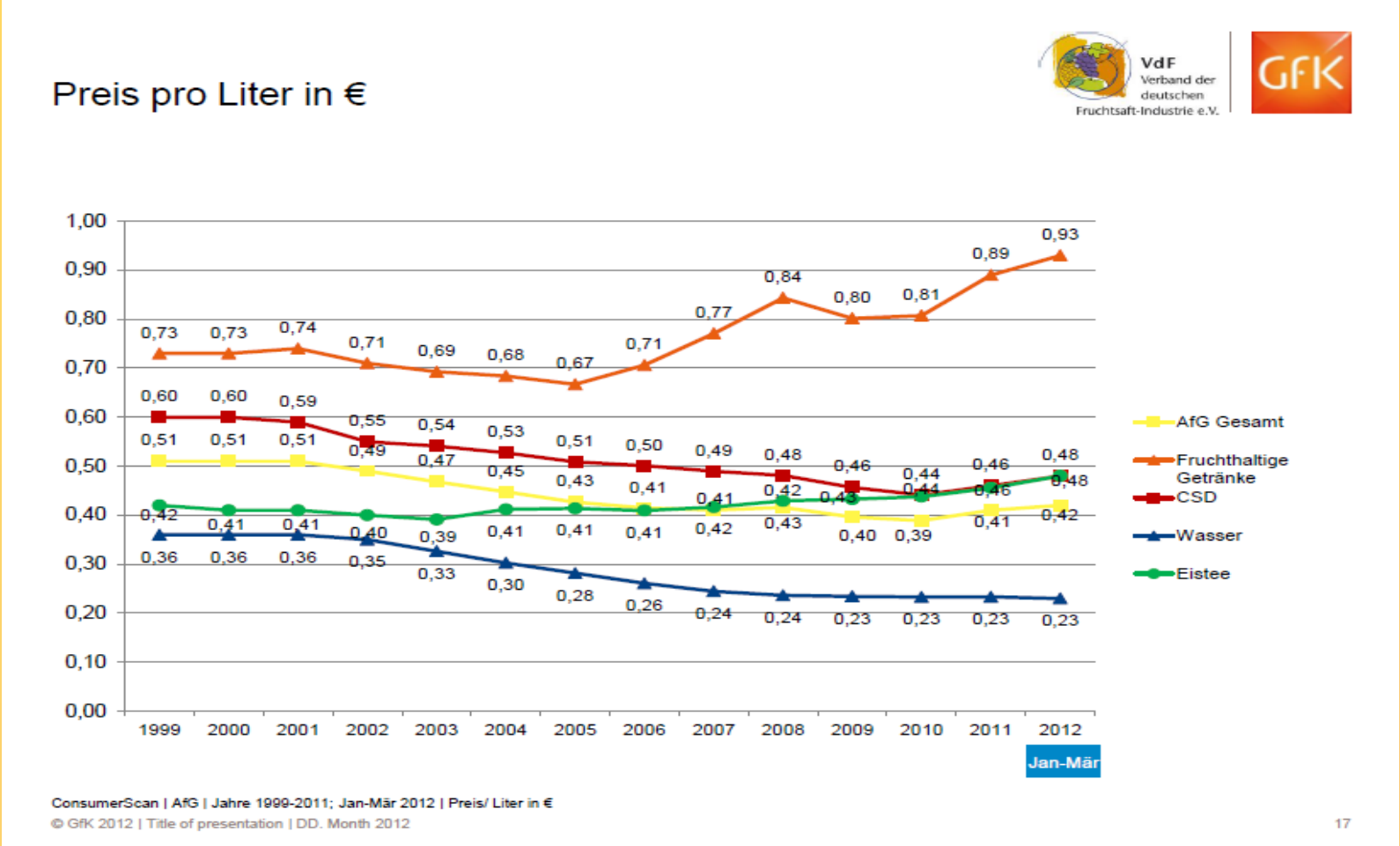


Source: GMI, Mintel – Sept. 2012

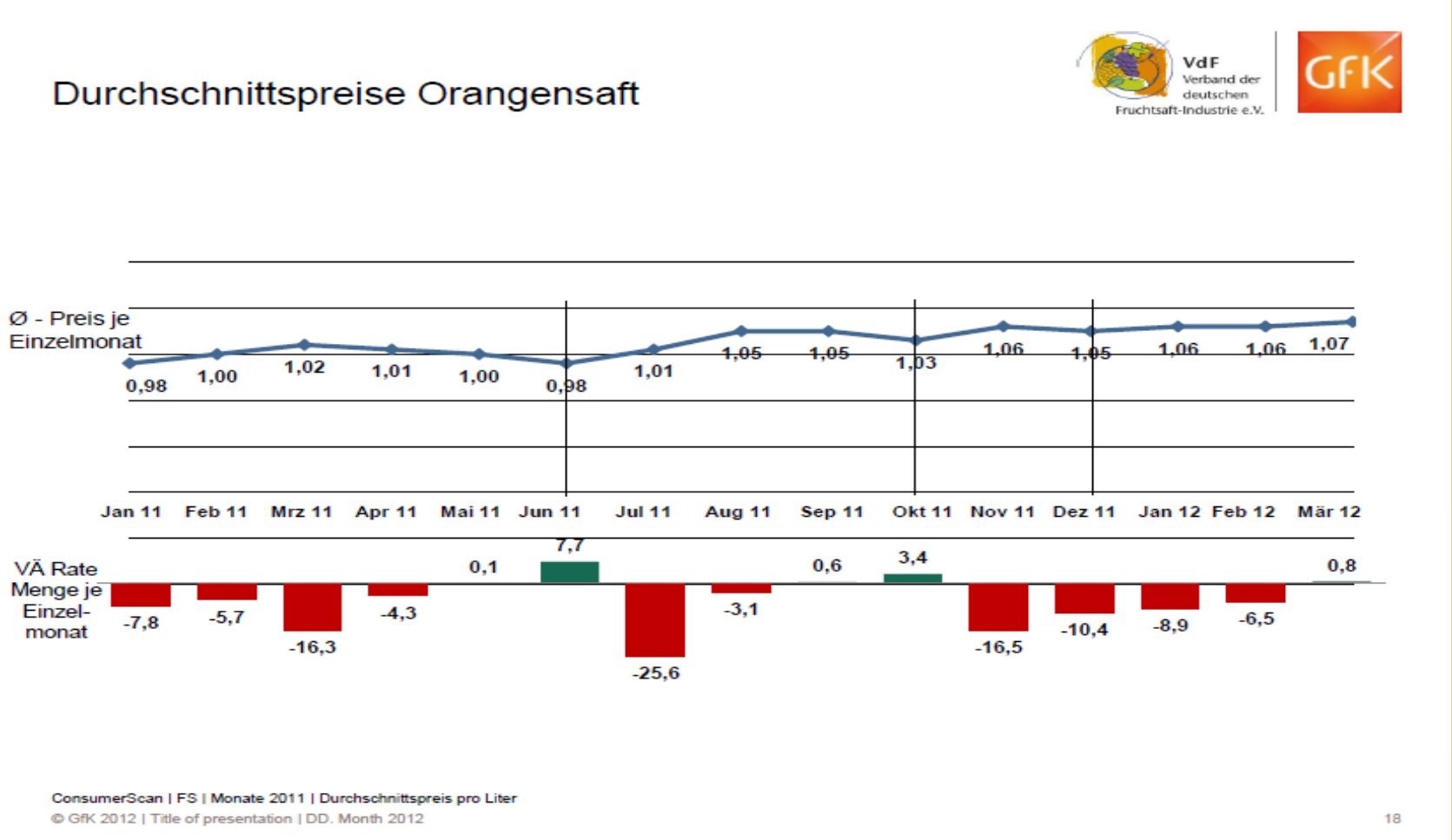
Germany
Value-based growth of FMCG



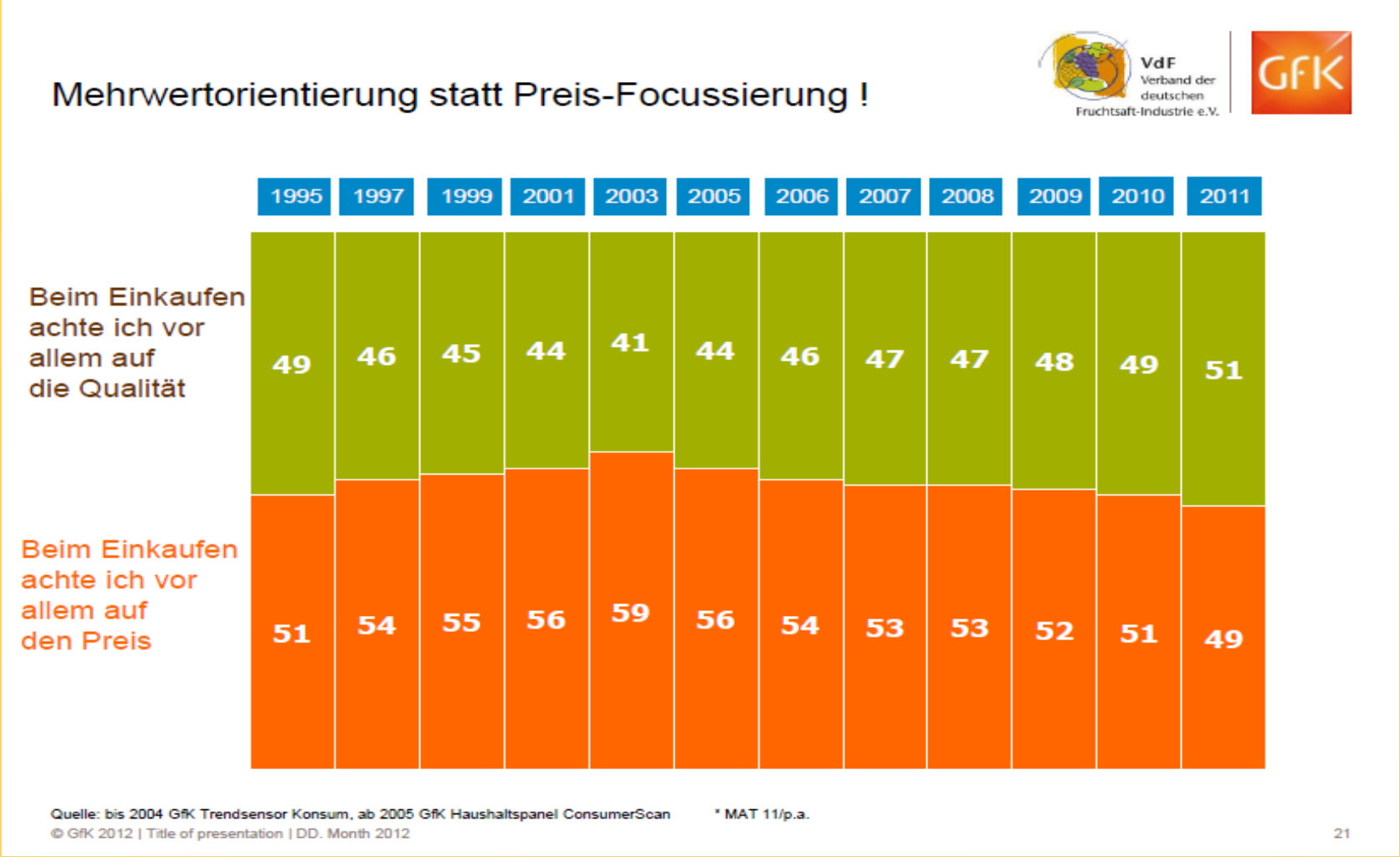
Germany
Long-term evolution of prices [€/l]



Germany
Average prices for orange juice [€/l]



Germany
Price-driven or quality-driven market?



Germany and UK
Key trends and challenges identified

Major current consumer drivers in both countries include:

- Health and wellbeing – growing importance of functional drinks with specific nutritional properties *but:* consider health claims issues => commercial and legal consequences
- Age concerns – generation 60+ , the young „oldies“ are an interesting segment *but*: elder people like natural, regional products, back to the roots => creating a new concept
- Convenience, food on-the-go, appealing packaging and handling *but*: consumers are also looking for more sophisticated or exotic products => diversity of choice

Conclusions

- Global juice consumption is stable but not really growing

  The data provided by globaldrinks.com/Zenith clearly indicate that water and still drinks are on the rise

  => Juice industry has to re-invent itself, more real innovation is required. Innovation is increasingly needing to put the consumer first

- In spite of the fact that Germany and UK have both their own structure [consumer habits/preferences], the key market trends and challenges are similar

  => Market growth is value-based not volume-based

  Implications for the juice industry

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Thank  You !