

The background of the cover is a photograph of an orchard. In the foreground, there are several wooden crates filled with red apples, arranged in a row that recedes into the distance. The orchard is lush with green leaves, and the scene is bathed in a soft, hazy light, possibly from a low sun or fog, creating a dreamy atmosphere. The title 'fruit juice' is written in a large, bold, sans-serif font, with the letters filled with a pattern of orange and red water droplets. Below it, 'FOCUS' is written in a solid red, bold, sans-serif font.

fruit juice

ISSUE 7 - JANUARY/FEBRUARY 2018

FOCUS

JUICE DYNAMICS

Global fruit juice performance

ALSO IN THIS ISSUE • A home for fruit eliminations • Popularity of lemon juice
• Russian juice trade • News & events

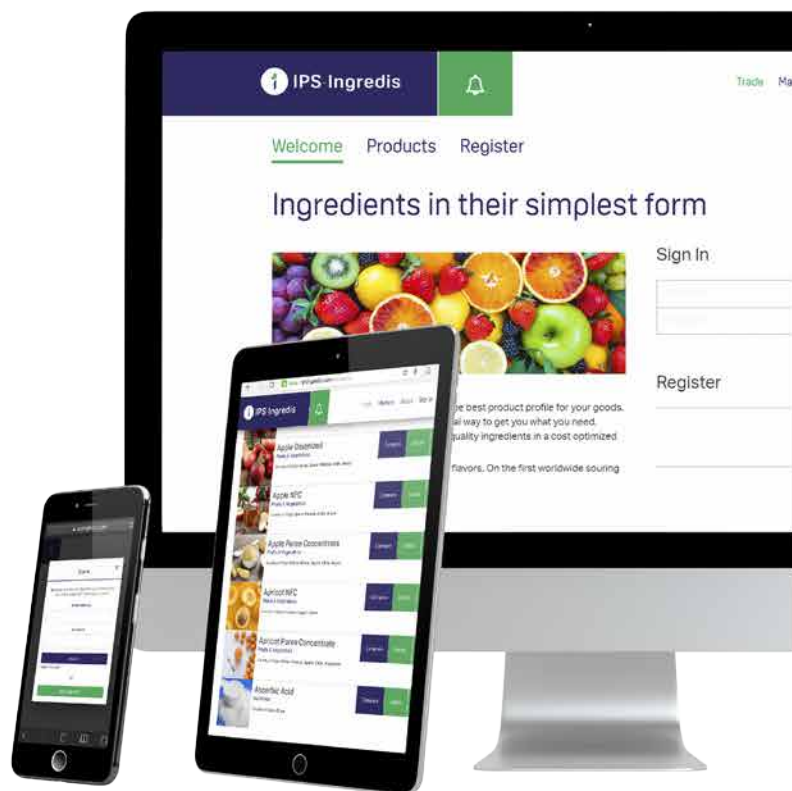


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04



26

Poland - Apple (June) Tonnes	
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Netherlands	
UK	
Austria	
USA	
Russia	
France	
Others	
World total	

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fruit juice FOCUS

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Welcome to 2018 and to the January/February issue of Fruit Juice Focus. In this edition Philip Coverdale of GlobalData provides some interesting insights into recent research they have conducted on the fruit juice industry and the trends for the future. We talk with Peter Hägg from ICA, the leading Swedish grocery chain about their partnership with the start-up company Rescue and how they are producing premium juice from the fruit that nobody wanted. Lemon juice was once the poor relation in the world of ingredients. This has all changed now with the rise in new product launches claiming freshness and sustainability where lemon juice has become the ingredient of choice to help these products fulfil these claims. Santiago Martinez from U-Citrus in Uruguay brings Fruit Juice Focus up-to-date on the latest developments in lemon. Plus, we bring you the latest crop reports from USDA, trade data on juice consumption in the Russian Federation and the latest news from the industry associations.

If you would like to submit an idea for an article please email me at the following address: ben@fruitjuicefocus.com

Enjoy the issue

Ben Martin, Managing Editor

From the publishers of:



The dynamics of the global fruit juice market

GlobalData recently published a report on the Dynamics of the Global Fruit Juice Market. Philip Coverdale, GlobalData's Director of Consulting, Beverages, presented an overview of the report's findings at the recent Juice Summit. Such was the interest in our review of the session in the November/December edition of Fruit Juice Focus that Philip has written an expanded extract for this issue. Here Philip looks at two key areas of interest - the global performance of fruit juice and nectars, and the seven top trends affecting the industry.



Philip Coverdale

At GlobalData we collect information on volumes and the markets in every single drinks and food category in 100+ countries and send out half a million surveys every year to consumers globally, checking their views on shopping habits and drivers to consumption. It is from these responses that we are able to draw on to form the basis of the trends that I am focussing on in this article. Not only to say what is going on in the market but predicting what we think is going to happen in the future.

Fruit juice and nectar performance globally

Although our research is focused on the EU we have provided some context by including **Fig 1** which covers all the major regions of the world. This



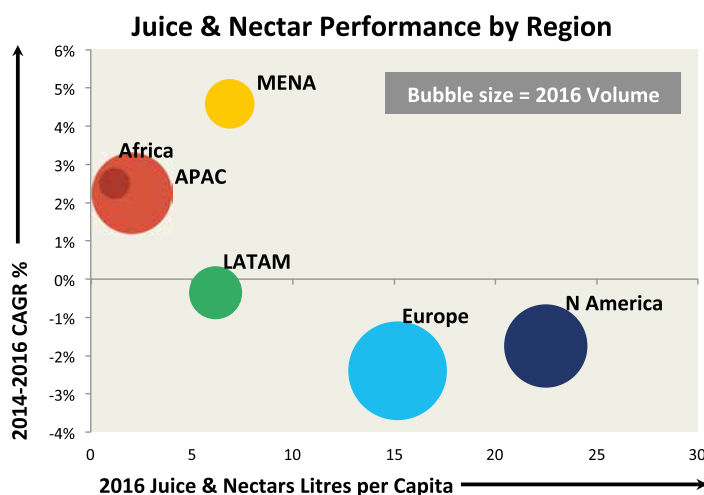
If I was a juice producer I would be looking towards those emerging markets as a real opportunity for growth.

is based on consumption per capita in 2016 on the X axis and average growth rates for the past three years on the Y axis. The size of the bubble is the volume of juice and nectars produced in that market. Any bubbles that are to the right of the chart are the higher per capita consumption markets and the opposite are the bubbles towards the left. And likewise the bubbles

that are higher up the chart are those regions in growth and those low down are in decline.

What immediately becomes apparent is that Europe and North America are quite heavily in decline, despite the fact that they are quite high per capita consumption markets. It's the emerging markets of Middle East and North Africa (MENA) and the Asia

Fig 1. Fruit Juice & Nectar Performance Globally



- Our research shows that Total Fruit Juices and Nectars in EU **declined by -2.4%** from '15-'16.
- This picture hides the real opportunity in Europe, where winning brands are focussing on **driving value growth**.
- Successful brands are aligning with **changing consumer trends**.

Source: GlobalData 2017

Pacific (APAC) and African regions that are portraying the opposite picture and are growing extremely quickly. There are many of reasons for this, growing middle classes is one of them, an expanding economy is another. There is also the influence of changing demographics where growing migration is contributing towards growth and usage of juices and nectars in those areas. APAC being so large in physical size is quite a high volume market, but in terms of the per capita consumption it is very low. Therefore the opportunity for these bubbles to move to the right to get more up towards Europe is huge and if I was a juice producer I would be looking towards those emerging markets as a real opportunity for growth.

Latin America (LATAM) is an interesting one because the slight decline in the region is primarily driven by a disastrous state of the economy and large unemployment with people choosing to trade down from drinking juices to drinking squash and powdered concentrate. Essentially the decline in Europe and North America is primarily driven by health concerns,

whereas the decline in LATAM is primarily driven by the economic situation. We actually think that the prospects in juice in LATAM are looking up and are reasonable.

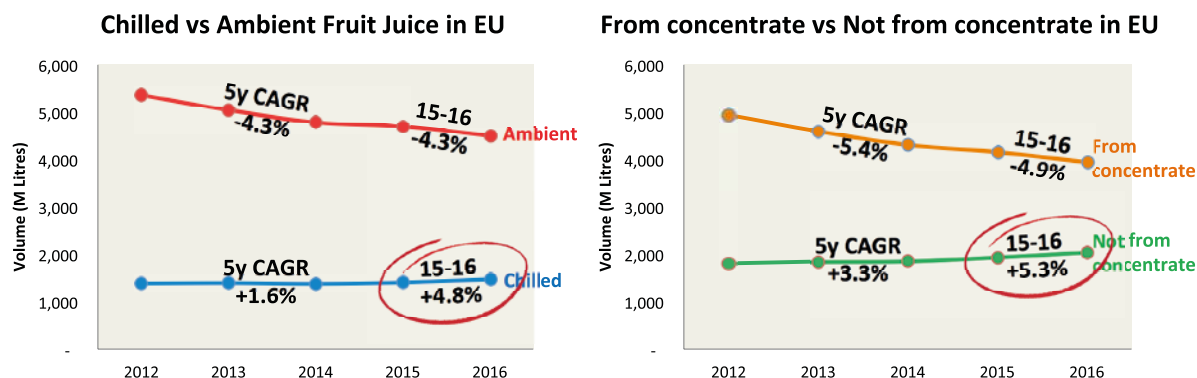
In the EU our volume data shows that the market has declined by about 2.5% just between 2015/16 but the main point the research is trying to get across is that this downward trend hides the real opportunity in Europe where certain brands are doing particularly well. For example cold-pressed brands are focusing on value growth rather than volume growth. We know that consumers are drinking less but drinking better quality juice and are willing to pay more for this. Successful brands are very much aligning themselves with these changing consumer trends which I cover later in this piece.

Nowadays if you walk into a café, maybe not a 'greasy spoon' but any mainstream cafe the shelves are full of cold-pressed juices and freshly squeezed juices. You wouldn't find any from concentrate or ambient juice - and if you did you would wonder

what is going on! So there is a massive change from what was common place 15 years ago. Similarly in retail, in terms of volume, 15 years ago there used to be huge consumption of juice drinks but a great deal of it was from concentrate. The ambient and from concentrate side of the market has gone down substantially and it's now all about the Tropicana's and the Copella's to name just two brands as examples.

I like to draw the comparison between old juice and new juice. When you look at shelves 15 to 20 years ago it was old juice, it was rectangular packs of basic juice, and now you look at the shelves and it's beautiful packaging, it's delicious juice. Another point to mention is one of the reasons why I think there's a decline in Europe is changing consumption occasions. I look at my own situation where 10 years ago breakfast was a real occasion and we used to sit down as a family and everyone would have their cereals and everybody would have a glass of orange juice with their cereals. Now everyone is in such a mad rush and a lot of people are consuming

Fig 2. Fruit Juice Performance in EU



Source: GlobalData 2017

breakfast on the go that the family breakfast occasion with people drinking juice is much less than it used to be and I think that is very much contributing to juice declines.

Fig 2 really just reiterates the point. I have looked at the stats for chilled versus ambient fruit juice in the EU and you will see that for ambient the five-year average decline is 4.3% and that decline has stayed the same between 2015/16 at about 4.3%. But if you look at chilled the opposite is happening. The five year growth is 1.6% but interestingly if you look at the growth between 2015/16 there is a 4.8% increase which in a quite a high per capita region is actually quite substantial. Something has really happened over the past couple of years which is really driving this chilled juice area of the market. Perhaps it is because the economies are generally picking up in Europe. A similar scenario is from concentrate versus not from concentrate. It's the identical picture. With from concentrate juice going down by over 5% over the last five years, average per year, and not from



Premium in both France and the UK is growing massively.



concentrate 3.3% average growth for the last five years and that has picked up dramatically between 2015/16 at 5.3%.

To bring the previous figs to life I have included **fig 3** which looks at a couple of important juice markets in Europe - France and the UK - where if you look at discount volumes (discount is where if 100% is the benchmark for the bestselling brand and pack size produced, then an index below 80 is what we class as discount and an index of over 120 is what we class as premium) you see premium in both France and the UK is growing massively, mainstream is fairly stagnant and discount is going down substantially - especially in the UK.

In my view the key point to take away from this data is that despite that initial chart showing that Europe is in decline, the premium end of the price spectrum is growing strongly and juice producers need to be looking at aligning their product portfolios with this more premium end of the market. In some cases I think they are getting the message. In the UK they definitely are but if you look at a market like Germany this is not necessarily so. Much of the juice that you get in Germany is still old juice.

So how does the future look? Essentially if you look at it in volume terms (see **fig 4**) the declines that we have seen over the past five years we think are going to slow down slightly over the next five years but still remain

Fig 3. Juice Price Performance in France and UK

		
3y CAGR 14-16	France	UK
Premium	↑ 14.4%	↑ 10.3%
Mainstream	→ 0.8%	→ 2.4%
Discount	↓ -3.9%	↓ -6.6%



• Despite a negative overall picture, the **Premium** end of the price spectrum is **growing strongly**.

Source: GlobalData 2017

in decline, with nectars declining more so than 100% fruit juice. But if you look in value terms, the decline is that much less and if you look at what we are forecasting in the grand scheme of things it is actually not too bad so we think that in value terms in Europe, juice and nectar producers are going to manage to more or less hold their own.

The seven top trends impacting the industry

At GlobalData we track over 100 trends and sub trends of what is going on in the market and these are just seven of those trends which we believe that juice producers and juice brands should be taking note of in order to align more with that premium value growth opportunity.

The first one is **Healthy Hydration**. Everyone has been talking about healthy hydration for a while but the fact of the matter is the primary driver in Europe for the decline in juice is because of increased health awareness. Juice has received some bad press on how much sugar it

contains and people have massively reduced their juice intake. We know that health is a key driver in soft drinks purchasing decisions and 'better for you' is really transitioned from a kind of nice to have to a necessity. But a key point here is that juice has a whole range of attributes that consumers associate with health. High in vitamins, high in antioxidants. Functionality - it's natural, it's fresh, raw. It's only got really one ingredient - the fruit - and if it's organic that's even better. All of these attributes consumers view as healthy.

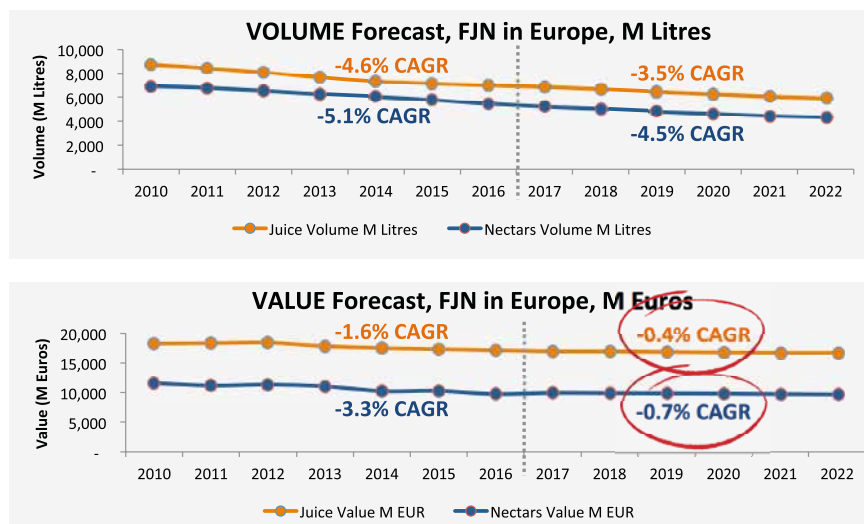
It's a shame that sugar has been the one that has come to the fore but actually there is a lot that juice produces can be doing to counteract this and I think that by producing premium juices using some of these terms it almost trumps and offsets the anti-sugar sentiment. When you go into a Pret a Manger sandwich bar in the UK and you see a beautiful cold-pressed apple and beetroot you don't really think about the sugar you think about how good it is for you. Forget the whole 'lower in sugar' angle on the

packaging that has gone before - it is better to focus on the positive side to juice using terms such as raw, pure and clean. Those three words from our surveys really resonate with the consumers, they love the whole raw thing - clean living! I think focusing on the nutritional benefits of fruit juice and developing functional and enhanced juices highlighting the vitamins nutrients and benefits is absolutely key.

The second trend is **Gut Happy** which is basically digestive health. Although this may appear to be quite niche, if you actually look down the supermarket aisles they are increasingly full of products that aid digestion. From our 500,000 surveys every year we know that digestive health is the third most desired health benefit in food and drink with the number one and number two positions taken up by generic terms like health and wellbeing. Digestive health is one of the most sought-after benefits in the product.

76% of consumers in our surveys find the claim 'good for digestion

Fig 4. GlobalData's Bayesian Forecasts



Forecasts based on:

- Mean Household Disposable Income
- GDP per capita
- Employment Rate
- Temperature
- Precipitation
- Gini Indices
- Life Expectancy
- Inflation
- Population
- Net Migration
- # Tertiary Students
- Urban Population (%)
- Age Demographic

Source: GlobalData 2017

and gut health' appealing in food and drink products. An example of a product demonstrating this that is now becoming mainstream is Kefir. You only have to go into some of the major supermarkets in the UK and there is Kefir everywhere. Similarly if you go into an outlet such as Leon you have got Kombucha on the menu which is just amazing. It has always been massive in America and is slowly infiltrating the market in Europe.

The third trend is the **Adultification** of soft drinks. We know there is massive rise in alcohol avoidance and that is definitely driving demand for more sophisticated adult soft drinks and these are consumed at the occasions where you would typically drink alcohol - in the pub, at home or when you get back from work. We know that over 20% of every age bracket except the over 65's are actively trying to reduce alcohol consumption and in the UK over 27% of the millennial age bracket now don't drink alcohol. Which go back 20 years if you're at university, and you didn't drink alcohol everybody would think you were a bit weird.

Juice has a whole range of attributes that consumers associate with health.

An increasing number of the soft drink producers are creating these more adult soft drinks and also many of the alcohol companies are producing either no alcohol versions of their beer like Heineken's zero zero beer. Big alcohol companies are looking to launch soft drinks within the adult space. They see this rising lack of millennial drinking as a real threat to the industry so the point here is that juice producers need to be considering pack design that positions juice as a credible alcohol alternative and currently they just don't. You would not go into a pub or bar and order a bottle of Tropicana!

Using sophisticated and experimental flavours is one of our main tips

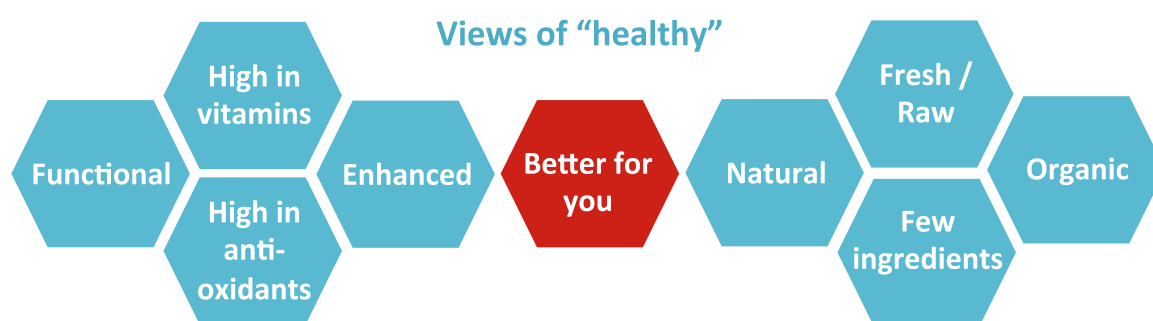
here. Emphasising the quality of the ingredients provenance, authentic production methods and heritage - craft drinks essentially - I think will work well for juice.

Cold is Hot is the fourth trend. I didn't want to concentrate on just cold-pressed juice. I also wanted to touch on the actual term cold because we know from our consumer surveys the term cold addresses this real desire for a cleaner diet and using the word cold is a real consumer friendly way to express that whole clean label concept. And we know that the word cold generates these feelings of freshness natural and raw which work well for juice companies. Where consumers may have negative

Fig 5. Seven Top Trends Impacting the Industry



Fig 6. Views of 'healthy'



health perceptions of juice, cold-pressed juice evokes a reaction which overcomes this. The industry buzzwords which are on trend and which the cold concept taps into are Raw, Fresh, Natural, Real and Pure.

You can see this reflected in other consumer products with cold brew coffee, cold brew tea and you are even seeing water with added cold-pressed juice. The brands are increasingly

looking to introduce the word cold into their marketing and on-pack messaging and the consumers are snapping it up.

Savory and Spice. This is the fifth trend and I think it fits into both healthy hydration and the adultification of soft drinks. We know that savoury and spicy flavours are really appealing to consumers. We know that consumers, especially younger consumers, are

willing to experiment with exciting flavours, but they are also looking for the health angle. In our global survey 80% of consumers think that ginger has a positive impact on health, with 66% thinking the same for cinnamon and 56% for turmeric. Just three ingredients picked out of an extensive list. Consumers are really valuing those ingredients and as a result we are probably going to see quite a

Cold taps into some key on-trend industry buzzwords:

Raw

Fresh

Natural

Real

Pure

Fig 7. Global: consumers who think the following have a positive impact on health



80%
Ginger



66%
Cinnamon



56%
Turmeric

big increase in the number of ginger flavoured juices for example. We know that all the big soft drink companies are looking at how they can introduce ginger into their products.

Next trend - six - is **Plant Power**. There seems to be this healthy halo associated with plants and botanicals and we are seeing a great many soft drinks companies introducing botanicals into their ranges. From our surveys in 2015 consumers are telling us that they think botanicals and plant extract have an impact on health - 63% was the global average which is notably high. The implications for juice companies - obviously juice comes from a plant - is that they should be capitalising on the naturally functional properties of botanicals and plants by promoting this on-pack.

The seventh and final trend is **Beautiful Packaging**. As mentioned earlier, in Europe you go into a cafe and the shelves are full of beautifully packaged juices. You cannot release a premium juice without putting it in something that looks pretty good. One of the really big points here is the rise of online and how shoppers scan through everything online when they're doing their Internet shopping. They pause for a split second to look at a picture and if it doesn't reach out and grab them they are just going to move onto the next one. The importance of beautiful packaging and imagery that kind of fits with this increasingly visual society in which we live in, is hugely important.

To summarise - if you look at the global level, Europe and North America

are still in decline, emerging markets such as MENA and APAC are the fastest-growing markets and offer the greatest opportunity, and although in Europe fruit juice and nectars volumes are declining - value remains fairly strong and this really points to premiumisation in the market.

Out of these seven trends that are covered in this article I think I would distil it down to two major areas. The first is premiumisation - which is high-quality ingredients, better processing techniques, interesting provenance, heritage, beautiful packaging and so on. And the second one is tactics to counter negative health perceptions - such as healthy hydration, promoting digestion, using savoury, spicy, botanical ingredients and trying to cater for alcohol avoiders. ●

GlobalData is now one of the world's largest consumer research, market intelligence companies specialising in strategy and consultancy work for fruit juice brands. They work closely with all the major drinks brands, retailers and food service suppliers around the world along with ingredients suppliers and packaging and equipment manufacturers. GlobalData work with companies such as McKinsey and Bain on specialist consultancy projects and worked with the AIJN to produce the 2017 European Fruit Juice Market Report.

Philip Coverdale moved across to GlobalData with Canadean, the drinks industry specialist research and data agency, when the company was amalgamated into GlobalData along with 20 other separate market research agencies

Philip Coverdale can be reached on Philip.coverdale@globaldata.com. 0044 7734 324198. Skype: philipcoverdale



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POLAND

Haskap juice to grow in popularity in Poland

Haskap berries, very much an unknown a few years ago, are making steady inroads into the Polish consumer market. With new less sour varieties being introduced Anna Litwin from the company Blie Haskap predicts that the Haskap will rise in popularity on the Polish market during the next few years. The berries are often frozen as part of the production process and a by-product of this has been the fruit juice which has an improved taste when made from the frozen fruit.

"Making Haskap juice from the frozen berries is great because the freezing process softens the tartness and gives it a good colour. We have gotten a lot of interest from health food stores, but I want to make sure that we don't get stuck in a category, I want Haskap juice and berries to be for everyone," commented Anna.

The juice is concentrated and will be offered in three litre plastic bags for the hotel, restaurant and café industry and 250 ml glass bottles for consumers.

Source: Fresh Plaza

GERMANY

Possible takeover of fruit juice producer Albi by food retailer Edeka

Reports at the end of December indicated that the food retailer Edeka were looking to buy Albi, one of the country's leading fruit juice manufacturers. Albi's distribution of fruit juice and own brand discounted ranges cover the whole of the German food trade and ranks in seventh place in the country with about 93 million bottlings according to press sources in the local industry.

Sources go on to say that Edeka already owns a juice producer in the Rostock area, with its own plantations and a fruit pressing plant in Poland and that their aim is to reduce dependence on external suppliers. There has been no comment from Albi at this stage.

Sources: Proplanta and Fresh Plaza

USA

Expansion plans for Natalie's Orchid Island Juice Company

With a new sales and marketing office in Colorado and an expanded marketing office in New York City, Natalie's

Orchid Island Juice is planning on increasing its visibility amongst consumers both in the western and north-eastern states of America. "Since the company's inception 28 years ago, our mission has always been to make our minimal ingredient, minimally processed juices available to as many people as possible because consumers deserve a clean, transparent option," says executive Natalie Sexton. "Today, we're thrilled to announce our expansion." She said just before this Christmas. "We decided to expand our marketing presence in the northeast," said Sexton, "We want to make Natalie's more readily available, and increase awareness about the brand - which we've done pretty successfully at a number of outdoor events in the area."

Source: Fresh Plaza

USA

New cold-pressed organic juice range launched by 7-Eleven

7-Eleven - the largest convenience store chain in the US has launched a range of private label organic cold-pressed juices as part of the group's ongoing plans to improve its food and beverage offerings in 2018. The juices which are USDA-certified, form part of the chain's 7-Select GO!Smart line of better-for-you products and the 14-ounce bottles have been priced to sell at less than USD3.00 in an attempt to undercut juice and smoothie bars.

As well as being organic, the juices claim to contain certified fair trade, Non-GMO Project verified, 100-percent fruit and vegetable juice, not from concentrate, with no additives and no added sugar.

The four juices launched so far are Clean & Green (made with kale, cucumber, apple, spinach, mint, celery, lime, and parsley), Tropical Glow (made with pineapple, orange, banana, apple, mango, passionfruit, and coconut water) Berry & Bright (made with tart cherry, carrot, blackberry, pomegranate, bilberry, cranberry, and acai) and Restoration Red (tomato, tart cherry, beet, strawberry, apple, and lime).

"When you compare this new line of 7-Select GO!Smart cold-pressed juices head-to-head with nationally recognized premium juice brands, well, there is no comparison," Tim Cogil, 7-Eleven director of new product development, said in a statement. "Ours are organic and cold-pressed, without additives and not from concentrate. Typically, this level of quality is only found at juice and smoothie restaurants."

Source: Food&Wine

UK

Unwanted fruit makes up new range of juices from Cotchel

In an attempt to reduce food waste on the family run farm in the south east of England the Cotchel brand is using all the reject fruits from the farm that can't be sold for the production of its juices no matter how ugly, deformed and what size they are. Pete Thompson, Founder of the Cotchel brand and third generation farmer commented that: "Every year tonnes of fruit is wasted around the country because it's too big, too small or too ugly to be sold. Instead of letting the unwanted fruit from our farm be wasted or processed off the farm, we decided to turn it into something delicious. Cotchel is all about creating a great-tasting fruit juice using fruit we can't sell and taking small steps towards reducing food waste."

The range is now available in selected retailers in south-east England.

Source: FoodBev

INDIA

Budget proposal to reduce taxes on fruit-based aerated drinks

The Indian Food Ministry has proposed that the tax rate on fruit-based aerated drinks should be reduced in the Union Budget 2018 reportedly asking the Finance Ministry to remove the cess* on these drinks. This would apply to drinks like Fanta and Appy Fizz which attract 28% GST along with 12% cess, which makes a total of 40% tax.

The Indian Beverage Association (IBA) have also made representations to the government about lowering the rate of cess in GST rates on aerated drinks highlighting concerns that what is effectively a tax rate of 40% on the category would impact the industry's growth.

In 2016, Prime Minister Narendra Modi suggested mixing at least 2% fruit juice in aerated drinks to help farmers find a new market for their produce. "Why can't 2% natural juice be mixed in aerated drinks? This will provide farmers with a market for their produce," he explained. Coca-Cola



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India was reported to be exploring options for doing so.

*A cess imposed by the central government is a tax on tax, levied by the government for a specific purpose. Generally, cess is expected to be levied till the time the government gets enough money for that purpose.

Source: Financial Express India

CHILE

Coca Cola affiliates in Chile to buy the company that produces the Guallarauco brand

The Chilean affiliate of Coca-Cola Co (KO.N) and local bottlers of the brand agreed to buy smaller rival Comercializadora Novaverde SA for \$80 million, the companies announced.

Embotelladora Andina AND_pb.SN, Embonor EMB_PB.sn Coca-Cola del Valle New Ventures and Coca-Cola de Chile agreed to buy the company best known for producing the brand of juices, ice cream and frozen fruits Guallarauco from Inversiones Siemel SIE.SN, according to a securities filing in January. The merger is subject to approval by regulators.

Source: Reuters

JAPAN

Peach Coca-Cola launches in Japan

Coca-Cola have announced that the release the world's first Peach Coca-Cola in Japan in for a limited time. Peaches are one of the most popular fruits in Japan with many believing ancient myths and legends that the fruit wards off evil. Japan's Hinamatsuri "Doll Festival", celebrated on 3 March every year, is also known as Momo no Sekku, "the seasonal festival of peaches". Research shows that demand for peach drinks is highest in Japan from January to March, so the January release date for the new Peach Coca-Cola is perfect timing. The new Peach Coca-Cola will go on sale around Japan from 22 January, with the 500-millilitre (16.9-ounce) bottle retailing for 140 yen (US\$1.25), and the 280-millilitre bottle (limited for sale at vending machines) available for 115 yen.

Source: SoraNews24

CHINA

SDIC Zhonglu Fruit Juice Co to acquire Appol Group

Lincoln International, a leading global mid-market investment bank, announced on December 14th, that

SDIC Zhonglu Fruit Juice Co., Ltd (SDICZL) had signed a definitive agreement to acquire Poland Appol Group (Appol). This is the Company's first acquisition under the Chinese "Belt and Road" initiatives, connecting the EU and Chinese markets by investing in Poland. Terms of the transaction were disclosed in SDICZL's announcement in the Shanghai Stock Exchange.

Source: PRNewswire

INDIA

Strategic partnership will see Varun Beverages help push PepsiCo India's juice sales

The largest bottler in the country Varun Beverages has partnered with PepsiCo India to sell and distribute the Tropicana range of juices along with Gatorade and Quaker Dairy products in north and east India. With the two regions making up 80% of the juice market in India Varun's coverage will help PepsiCo reach more customers. The Times of India reported a PepsiCo spokesperson as saying: "The urban and rural markets are growing faster than metros for juices. In the north and east, we could only serve 90,000 outlets. The agreement with VBL (Varun) will double our distribution reach."

Ravi Jaipuria, Varun Beverages chairman commented: "I am very pleased to share that Varun Beverages Limited and PepsiCo India have decided to enter into a strategic partnership for selling and distribution of the larger Tropicana portfolio that includes Tropicana Juices (100%, Delight, Essentials), along with Gatorade and Quaker Value-Added Dairy in territories across north and east India" He added: "With VBL already holding manufacturing, sales and distribution rights for Tropicana Slice and Tropicana Frutz in north and east, we are confident that the addition of this portfolio will help expand the franchise for brand Tropicana in these territories."

Source: FoodBev

UK

Refresco and Cott merger could lead to higher prices for some juice drinks

The UK Competition and Markets Authority (CMA) has raised concerns that the merger between Refresco and Cott could raise prices for certain juice drinks. Refresco says it is willing to offer suitable remedies and will fully cooperate with the authority to address the issues raised.

Source: Beverage Daily ●

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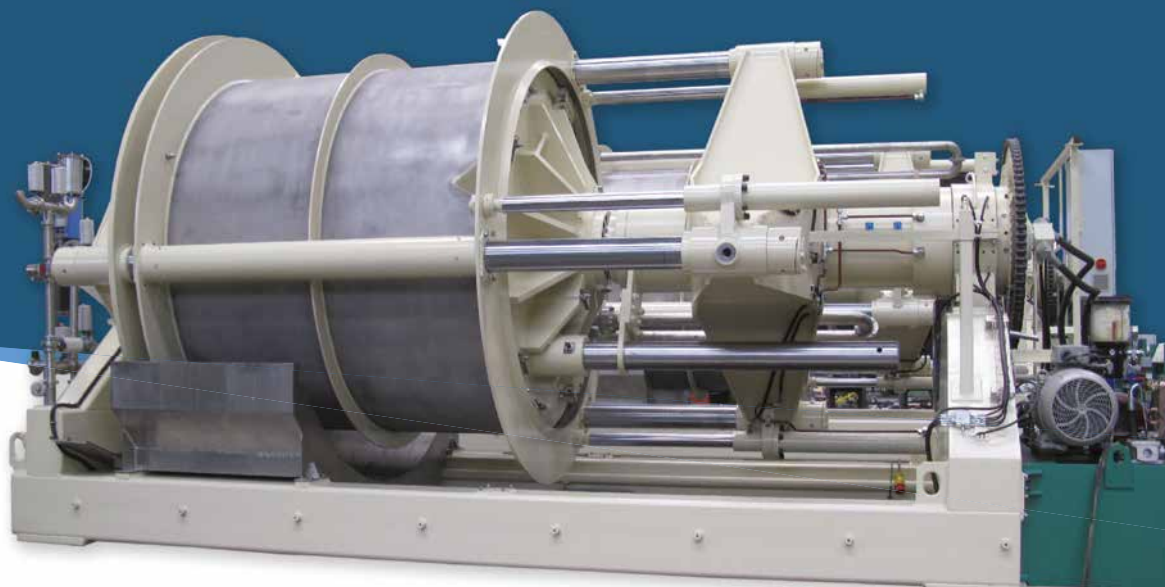


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CASE STUDY

Juice innovation



From rejected fruit to premium juice

How a leading Swedish grocery chain teamed up with a small start-up business to produce premium juice from the fruit that nobody wanted.

Just over a year ago two young entrepreneurs approached the Swedish grocery chain ICA offering to take their rejected fruit and recycle it into bottles of high quality fruit juice that ICA could buy back and sell in their supermarkets. This would reduce waste, generate income for both companies and benefit the environment and society. Simple and very effective – as some of the best ideas are. This circular approach to resources and waste management was recognised as serving as a source of inspiration for the whole of the retail

trade in the region and the initiative was shortlisted for the Nordic Council Environment Prize 2017.

Peter Hägg was the senior category manager at the ICA fruit and vegetable division when he started up this project with Rescued Fruit – now called Rescued – back in 2016. Peter is currently responsible for sponsorships at ICA and is involved in sponsoring selected humanitarian causes such as the Red Cross and the Pink Ribbon Childhood Foundation. Peter will return to his previous position in the fruit and veg team later this year.

The ICA Group is a retail company with 1300 grocery stores in Sweden. The fruit and vegetable section of the business where the Rescued Fruits initiative was first launched is situated in Helsingborg and employ upwards of 80 people working within category development and the buying and replenishing of fruit and vegetables for all the depots within Sweden.

Rescued, then called Rescued Fruits was founded in Helsingborg in 2015. The background was that there is too much good fruits and vegetables thrown away, unnecessarily. Rescued,



Peter Hägg



salvage fruit and vegetables which otherwise would be wasted, fruit and vegetables that do not fit into corporate production. For example, bruised apples, wrong sized pears or weird-looking carrots. They check, sort and wash everything gently and then turn the goodies into great juice. The different kinds vary depending on the season, which means flavours vary too. The juices are sold mainly in coffee shops, restaurants and selected grocery stores in Sweden. Rescued now has 8 employees and has increased revenues by 237% during the period 2016-17.

Here Peter Hägg from ICA talks to Fruit Juice Focus about his experience of the Rescued initiative he helped to launch and why it is important today that ideas such as these should be replicated worldwide.

Fruit Juice Focus (FJF): How did ICA get involved with Rescued, how did this whole idea come about?

Peter Hägg (PH): Normally it is not very easy for a small company, such as Rescued was then, to just walk into the offices of a large company like

“ This circular approach to resources and waste management was recognised as serving as a source of inspiration for the whole of the retail trade in the region.

ICA and say we have a business idea can we have a contract please! Which is exactly what Truls Christenson and Cecilia Larsson did when they approached us at the Helsingborg offices of ICA. It did help that at the Helsingborg offices we have a forward-thinking management team which were able to speed up the acceptance and commencement of the project.

These young entrepreneurs came into our office during the autumn of 2015 having just turned 29 and 19. And talk about good timing! The initial meeting with Truls and Cecilia took place one month before we were setting up the strategy for the coming year.

They had some interesting questions regarding our business. They observed that the ICA operation in Helsingborg imported a large amount of fruit and vegetables and suggested that there must be waste in our supply chain.

I was thinking about that for a while and I thought no, we don't have much waste really. Especially not for apples where we know we have one of the smallest percentages that we record as waste in our warehouse – it's barely 1.8% or close to this.

But when I then looked at what 1.8% was in actual kilos it turned out to be 8000 kilos of apples which equates to approximately 11,000 bottles of juice during the course of one year. I

then thought in more detail about the waste aspect of our business.

Of course, those kilos I referred to above for apples are not constant from one week to another at that same level. It can vary a lot over time. It could be just a small amount of damaged items or it could be a complete container that is deemed as being of unsuitable quality or damaged in some way that has arrived and is sitting in our warehouse. This might mean 24 tonnes of fruit is not usable.

On these occasions we call the supplier and discuss what to do with the fruit since the quality is not in line with the agreed specification.

Do they want us to sort it? This would cost some money. Do they want us to send it back? This would cost the supplier money organising return transport. Or do they want us to try selling it for a discount price? Thereby reducing all profit and sometimes reducing normal turnover of accepted fruit with normal margin. If the above solutions are rejected the products will end up as landfill gas (biogas) and that will also end up as a dumping cost for each pallet. These are the normal solutions for a container of rejected fruit that arrives at our Helsingborg depot.

After reflecting on this we realised that Truls and Cecilia's proposal could make sense and we agreed to talk more.

FJF: Can you explain in more detail what Rescued were proposing?

PH: The business idea Rescued put on the table was that they would take all rejected fruit off our hands. Truls and Cecilia didn't want to pay for the fruit because then, as they pointed out, it's not waste. 'We want to take care of the real waste' they said. We at ICA could throw them all away but it would cost us at least EUR10 per pallet to do this so it's a cheaper way for us just to send it to Rescued for free than to get rid of it.

The plan that we agreed was that we would send to Rescued from our depots all the rejected, unusable fruit that we couldn't sell in our stores. They



The business idea Rescued put on the table was that they would take all rejected fruit off our hands.

would then process it into fruit juice, bottle and label it as ICA private label. We would buy the finished product back into our warehouse and then stock it for sale in our retail outlets.

Having secured this deal with us Rescued were able to go to their bank and report that they had a contract with a major customer – ICA – thus securing a business loan to set up their factory and install the machinery needed to commence operations. The team behind Rescued made that happen within six months.

FJF: When did the first bottles of Rescued juice start rolling off the production line?

PH: It was June of 2016 that things began to move and we were in a position to start selling bottles of Rescued through our stores. We generated a lot of attention both in the media and with our customers due to the fact that no one had done anything like this before.

FJF: How has the operation developed? What obstacles have you and Rescued experienced along the way and how have they been overcome?

PH: One of the hard parts for the Rescued team is to make the operation viable where the quantities of fruits are fluctuating. To combat this as the company developed they have taken on a number of other big importers around Sweden providing them with an economy of scale which has made a big difference. Also at ICA we have run trials with some of our bigger retail outlets where they send back any waste from the stores to our warehouse and then we transport it on to them for processing.

What we also did from the beginning was a conscious decision not to make any profit from this project. We decided that it was a great thing to be able to rescue fruit that somebody had planted and nurtured and grown from the soil and transported it across the globe only to have it rejected and on the verge of being destroyed. We all felt that this was a terrible waste, so we are doing this for a good cause.

We made a small investment for the first year for every bottle that we sold to be able to make this work and to start in a good way. And now since the volumes have grown we have started to break even.

Since we launched it as a private label brand it has enabled us to use internal marketing resources to tell the story about rescued fruits and promote the product in Sweden.

Meanwhile they have also developed their own brand at Rescued which are now selling to restaurants, coffee shops and bars in Sweden. They have managed to create a really good premium label and are able to sell at premium prices in these restaurants and cafes with the result that nearly 80% of their turnover comes from their premium brand. ICA is now only a small part of their business.

FJF: What happens when there is not enough damaged fruit in the ICA chain? Do you slow down production of the bottled juices or do you supplement it with undamaged fruit? How do you manage that situation?

PH: We have discussed combining damaged fruit with industrial contracted fruit but we have never done it. I don't think it's a bad idea because in order



to have an operation that's running to save as much fruit as possible if there is 80% rescue or there is 100% or 70% it shouldn't really matter because it's also important that the shelves in the stores are always filled up with juice.

If you leave an empty space on the shelves someone else will take the spot. We have not taken a decision to combine with industrial contracts yet. It could happen in the future. For now we have sold the juice in the category of fruit and vegetables. In that specific category in the stores you set something up every day and then you compare it from one day to another and decide how you will present the fruit and vegetables section. It's not like an ordinary shelf of bottles of drink for example. We have accepted that during certain times of the year there will be a shortage due to lack of fruits.

“ We reward the stores who are good at sending back the fruit. We send them a diploma that says thank you for rescuing 200kg of fruit made into delicious juice.

It is a very good thing that in the ICA stores we are able to display the fruit juices right next to the apples in the stores and this demonstrates to the consumers that ICA are very much responsible for what we do.

Together with Truls and Cecilia we have also set up the diplomas whereby we reward the stores who are good at

sending back the fruit and we can send them a diploma to pin up on the wall that says thank you for rescuing 200kg of fruit made into delicious juice. Most companies like ours always have empty space on the lorries going back to the depots as we are still transporting crates or rolling container pallets and rejected items from the stores. There is always transport for that so there isn't

any extra cost to us transporting this back to the depot - it's just that we are filling up the trucks better.

FJF: You say the price for these juices is higher than the standard pricing due to the more labour- intensive production methods?

PH: Yes, that is correct. Even if the product is cheap (free in effect) you still need to collect the fruits. And when it comes into Rescued's warehouse they need to store the fruit properly. Rescued also need to sort it before they commence juice production. For instance, they need to take away all the most damaged fruit and all the stickers on the apples – and we have a lot of stickers – and this is a process that needs more attention and involves more cost than a juice factory. And this is what makes our juice a bit more expensive when you relate it to everything else. Also, there are small things such as the handicraft of tasting the products and the mixing process to produce a delicious juice which adds to the cost. Remember, apple varieties vary and create different challenges that need to be handled by adding ginger, lemon or cinnamon to achieve perfection.



Consumers are prepared to pay a premium price because they recognise that this is a good cause and the delicious result is worth every penny.

Consumers are prepared to pay a premium price because they recognise that this is a good cause and the delicious result is worth every penny.

FJF: Are you considering extending this process beyond apples?

PH: We have used pears. We started with marmalade from pears then we discovered after a while that one pear is one jar of marmalade and Swedish people don't eat much marmalade so we can't rescue that much. We have also created a juice with pears and lemons and that works quite well. We also use different ingredients like lemons to be able to spice the juice even if its apple content of say 80% we can still use lemons and ginger and

other similar ingredients. We can use different flavouring products when we have waste on those as well.

FJF: Can you quantify how much fruit has been rescued since the initiative was introduced?

PH: By mid-2017 after the first 12 months since launch, approximately 33,466kg of fruit has been saved from ICA's warehouses and ICA stores corresponding to 54,336 bottles of juice. This continues to grow on a monthly basis. We look forward to hearing from companies in other countries and regions on how they might be introducing the same processes to their rejected fruit. Everybody can win from this initiative. ●



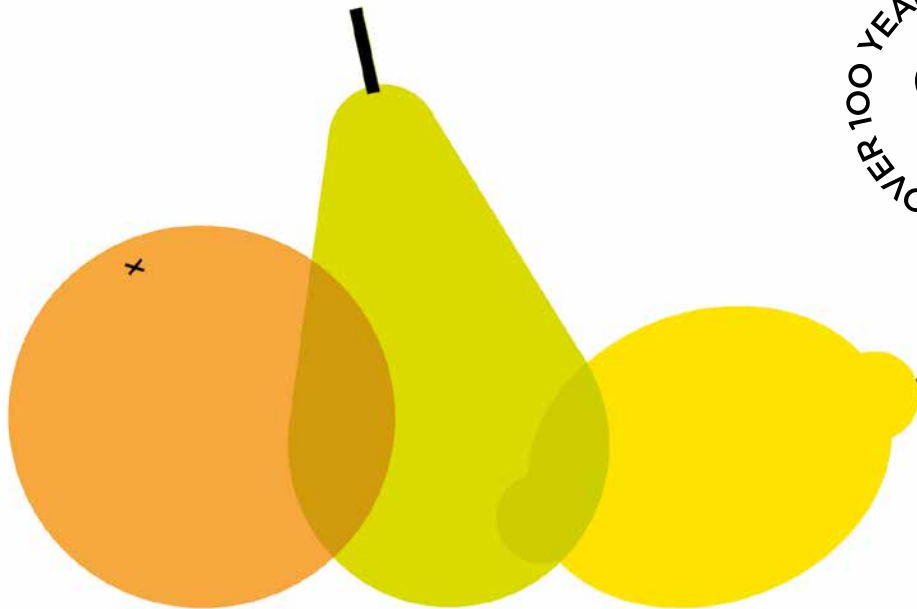
We are so proud and happy for the cooperation with ICA. We have learned a lot from each other along the way. I still remember when it all began. Now it feels surreal that that we managed to fill the first 20 000 bottles with a funnel and a measuring cup. There are a lot of new things in the pipeline and we are looking forward to rescuing more fruits and vegetables working together with ICA.

Truls Christenson, one of the initiators behind the project at Rescued.



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Lemon juice gets the red-carpet treatment...

Lemon juice is replacing citric acid as an acidifier in more and more products and it is moving to the top of the ingredients list and featuring more and more on the front label. It is being used as an acidifier in juice blended drinks where lemon juice concentrate is being used for tartness and other products that go from yoghurt to a very wide range of products. In non-alcoholic beverages lemon is considered to add the refreshing character to herbal, vegetable and fruit beverages and stands third behind orange and apple in the table of strongest flavours in non-alcoholic beverage product launches last year.

In terms of world lemon juice supply for the period 2016/17 Argentina is way ahead at 61% leaving the nearest country, Spain, trailing at just 15%. With 75% of Argentina's fruit harvest going to industrial use compared with only 35% across the other main sources of supply. Small fresh fruit exporters are losing ground and share to the big producers. Predictions

are that demand for lemon juice will continue to grow and diversify into new usages and that new trends and changing consumer habits call for higher standards of fruit production and juice processing. Only processors that can meet these new standards will be capable of supplying lemon juice for the front label.

Following his presentation at the Juice Summit on trends in the lemon juice industry, Fruit Juice Focus caught up with Santiago Martinez Founder of U-Citrus, a Uruguayan based sales and logistics structure for world-wide supply of fruit juices to talk in depth about how new customers are using lemon juice in a number of different ways.

Fruit Juice Focus (FJF): Can you tell us about the changes in the ingredients list for fruit juices and how lemon juice has become a prime ingredient in recent years?

Santiago Martinez (SM): There are three key changes and I will outline them here.

Unlike other juices - particularly the main juices such as orange or apple, lemon has always been treated as a minor ingredient and not a fruit juice in its own right, except obviously for salad dressings.

What we are seeing now on the demand side are changes within the ingredient list. Firstly, lemon as an ingredient has gone from practically non-existent to existent. Historically citric acid has been widely used as an acidifier in fruit juices and other products. This is not necessarily the case anymore. If you are launching a beverage product nowadays that claims to be natural you should not use citric acid as an ingredient. You need to use a fruit juice, and this is where we see the rise in popularity for lemon juice as a replacement for citric acid.

With the huge rise in new product launches worldwide in recent years (see fig 1) claiming freshness and sustainability as a major selling point (reportedly 20% year on year for the past five years) a major opportunity has arisen for lemon juice to become



Santiago Martinez

“Lemon as an ingredient has gone from practically non-existent to existent.”

the ingredient of choice to help these products fulfil these claims.

The second key change is where lemon appears in the ingredients list for a functional purpose. Many of the new super fruit juices and super veggies are looking for ingredients that will provide the freshness that consumers desire. And lemon is the answer. You only need to look at the explosion of new launches in the beverages market and you will find that lemon is not only being used as an acidifier in these products but also increasingly to add that touch of freshness.

And thirdly is the launch of the new lemonades. This is fantastic news for lemon because the enormous difference now is that the new lemonades are using upwards of 10% to 14% lemon juice content where normally you would have seen as low as 1 or ½% in a typical multifruit nectar. Each glass of lemonade that replaces a glass of nectar in the consumer's share of stomach represents a 10 or 20-fold increase in lemon juice consumption.

Let's take the Hollywood analogy and you can see how lemon juice has risen from a bit part player to a star role in the ingredients list. When you watch the credits roll at the end of the movie in the cinema there is a long list of names that nobody cares about scrolling up the screen. Lemon in the ingredients list has many times been the equivalent to "safety guard #3". But now lemon can be seen in the opening credits as one of the stars or main characters of the production. That's how much things have changed for lemon over the past few years.

Why - because lemon is fresh.

It is lemon juice plus watermelon, lemon juice plus herbs, lemon juice plus strawberry. All the other juices or ingredients are now no longer the main character. The main character is now lemon.

And another interesting development, and I refer to my Hollywood analogy again, when lemon is the lead character, the star of the ingredients appears on the front label - this movie star needs

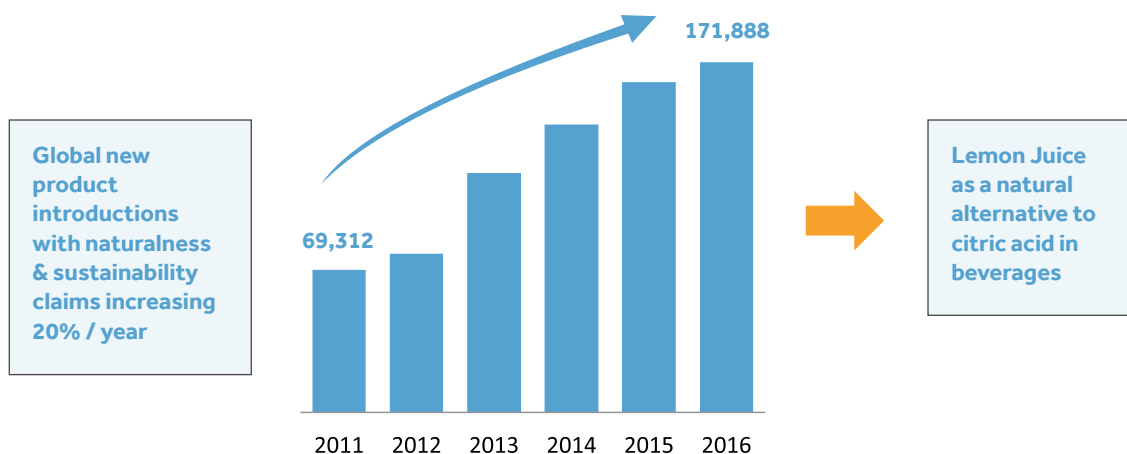
to go to the hairdressers, to be well dressed for the red carpet. This means that the quality of the lemon juice at this level needs to be the best, whereas when lemon juice was just an acidifier at the end of an ingredient list of 10 fruits nobody really cared about the freshness or the colour of this lemon.

The changes I see are: firstly, the replacement of citric acid. Secondly lemon as a character of freshness in this new range of beverage launches. And thirdly, lemon as the main fruit. All this means we will have to focus much closer in the quality of the lemons we produce and supply. Another point to consider when talking about quality is AR's. When lemon is not a tiny ingredient anymore, a whole new level of quality parameters need to be reached.

FJF: This is a whole new set of rules and regulations then, being introduced for the lemon industry along with associated costs?

SM: Yes, but basically those are being already matched by the main suppliers

Fig 1. Consumption trend for naturalness & sustainability



from the main countries of origin. At the same time, some origins will not be able to reach the new quality requirements that will become the new world standard.

FJF: Lemon juice is obviously a good business to be in currently. You source your lemons from Argentina, can you tell us about industry and market conditions there at present?

SM: Yes, we have an easier life than many other colleagues in the fruit juice business. Right now, lemon is a very healthy sector to be in.

The good news about Argentina is that 75% of lemons are produced for industry already. The whole region is industry focused will be even more in the near future.

If you look back at the orange fruit juice industry in Argentina it was larger than Brazil in the 1960s. You can see there a very easy example of what can be achieved when you focus in producing for industry at the correct geography.

FJF: Are lemons resilient to disease such as citrus greening?



Right now, lemon is a very healthy sector to be in.

SM: Yes, they are resilient to some diseases. Most of the orange trees were killed by diseases but the lemon trees survived. But if you are talking about HLB then there is no good news. HLB will arrive and we will have to live with it. We will have to do what countries like Brazil are doing and learn from their experience.

FJF: Do you see any other countries or regions competing with Argentina?

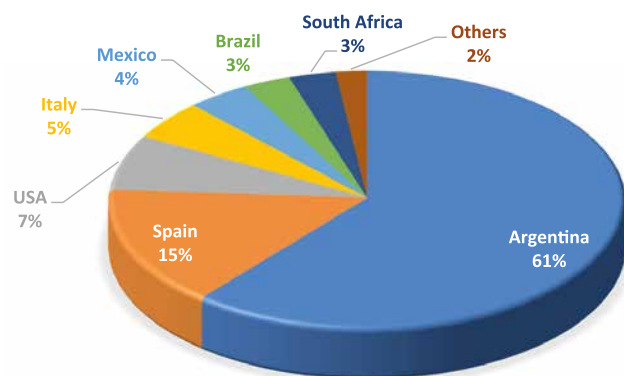
SM: To be very honest, a good business will always create its own competition. This is a reality. Argentina does have an advantage, but will have to increase its focus in producing for industry and setting the world's highest quality standards.

The serious global buyers who are looking for significant supply of lemon juice concentrate with strict parameters of freshness, colour, traceability and the lowest AR's content will have few alternatives to Argentina origin.

FJF: Do you see the trend for lemon slowing any time soon? With the trends of sustainability and naturalness growing in developed countries they appear to be prepared to pay the price for quality and provenance, particularly the younger generation.

SM: Yes, what is going on for lemons stems from the demand side. The demand figures are very interesting. We are growing our supply year after year and the demand is still there and

Fig 2. World lemon juice supply



Crop 16/17 - Total volume processed: 1.73 million tonnes

will continue to grow along with the increasing new product launches that are promoting natural ingredients and freshness.

To conclude: we are seeing larger production figures than ever before, and we are seeing the demand growing year by year. Our sales figures have grown substantially, specially to those customers who pack products based on these new trends. The new customers - those that are launching these exciting new beverage products on the market - are increasing their consumption year after year. It is definitely an upward trend. From the lemon industry's point of view - long may it continue. Everyone is a winner. ●

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USDA data - Brazil - Orange

The commercial area in the state of São Paulo and the western part of Minas Gerais should account for 320 million boxes (13.06 million tonnes), a decrease of 19% compared with 2016/17

Total Brazilian FCOJ production (65 brix equivalent) for 2017/18 is projected at 1.15 million tonnes, a 16% drop compared with the previous year. The São Paulo industry is expected to process 278 million boxes of oranges for orange juice production, 208 million boxes for FCOJ and 70 million boxes for NFC production, accounting for 1.052 million tonnes of juice (780 000 tonnes and 272 000 tonnes of FCOJ and NFC respectively).

Total Brazilian FCOJ exports for 2017/18 are projected at 1.137 million tonnes, a decrease of 9% on the previous year. The São Paulo industry should contribute 1.082 million tonnes.

Inventory levels for 2017/18 are projected at 60 000 tonnes (FCOJ equivalent) down 25 000 tonnes from 2016/17.

USDA stock figures only include juice in the storage tanks of the facilities (processing plants, port terminals etc...) in Brazil. They do not include stocks owned by Brazilian companies abroad, e.g., in transit and port terminals in the US, Europe and Japan.

According to the Brazilian Association of Citrus Exporters (CitrusBR), global Brazilian orange juice inventories were 107 387 tonnes (66 Brix) on 30 June 2017, which includes 6 872 tonnes of orange juice in storage tanks (processing plants, port terminals, etc...) in Brazil. CitrusBr projects global orange juice inventories on 30 June 2018 at 207 565 tonnes. CitrusBr global inventories include orange juice in storage tanks at processing plants and port terminals in Brazil and stocks abroad (vessels and port facilities worldwide).

Table 1. Brazil Orange Juice (65 brix equivalent) Tonnes

Season	2016/17	2017/18	2018/19
Beginning stocks	147 000	6 000	85 000
Production	859 000	1 372 000	1 152 000
Exports	962 000	1 255 000	1 137 000
Dom. consumption	35 000	38 000	40 000
Ending stocks	6 000	85 000	60 000
Total distribution	1 006 000	1 378 000	1 237 000

Source: USDA

USDA data - Poland - Apple

Poland's 2017/18 apple crop is estimated at 2.8 million tonnes, a 20% decrease from last year.

The USDA estimates that Polish processors will use 1.4 million tonnes of fresh domestically grown apples in 2017/18, a decline from 1.8 million tonnes in 2016/17. Almost 50% of domestic apples are processed, mostly into concentrated apple juice. Except for apple juice concentrate, Polish processing capacity remains relatively low.

Poland is the EU's largest producer and exporter of apple juice and apple juice concentrate (AJC). In 2016/17, production reached 300 000 tonnes. The smaller crop in 2017/18 is expected to lead to a 27% decrease in AJC production from the previous year. Output will depend on the quality of apples on the market in the second half of 2017/18 (July to June marketing year).

The USDA forecasts that the export opportunities for Polish apple processors in 2017/18 are lower. Higher input costs will increase apple juice prices and this is coupled with strong competition from China. AJC exports in 2017/18 are expected to reach 224 000 tonnes, a 20% decline from the

Table 2. Poland - apple juice 2017/18 (USDA) Tonnes

	2015/16	2016/17	2017/18*
Apples for fresh domestic market	147 000	6 000	85 000
Apples for processing	859 000	1 372 000	1 152 000
Apple concentrate production	962 000	1 255 000	1 137 000
* Estimate ** Including imported AJC mixed with apple juice produced from locally grown apples			

Source: USDA

Poland - Apple concentrate exports (year ending June) Tonnes

Commodity code 200979	2014/15	2015/16	2016/17
Germany	145 000	147 000	117 000
Netherlands	26 000	23 000	26 000
UK	26 000	27 000	26 000
Austria	15 000	18 000	24 000
USA	31 000	3 000	12 000
Russia	21 000	9 000	12 000
France	6 000	8 000	10 000
Others	42 000	35 000	52 000
World total	312 000	270 000	279 000

Source: Global Trade Atlas

year before. In 2016/17 Poland exported 279 000 tonnes of AJC. The main export destinations are Germany and other EU member states. The main non-EU export markets are the US and Russia.

Exports of AJC to the US and Russia in 2017/18 are expected to decline due to strong price competition from China. In 2016/17 Poland exported 12 000 tonnes of AJC to the US and the same amount was shipped to Russia.

In recent years, Poland has imported small amounts of AJC from other countries, mostly from the Ukraine and Moldova to blend with local supplies. In 2016/17, Poland imported 54 000 tonnes of AJC. According to industry sources, imported Chinese AJC would be able to compensate for the domestic supply shortages in 2017/18.

USDA data - Europe - Orange

Total EU orange production in 2017/18 is expected to fall 7.7% to 6.2 million tonnes, of which 1.3 million will go for processing, says the USDA. Spanish orange production is predicted to fall 11% to 3.2 million tonnes.

EU orange juice production is forecast to fall 11% to 102 000 tonnes.

EU orange juice imports in 2016/17 were 682 000 tonnes, of which 90% were from Brazil.

USDA data – China – Orange

2017/18 orange production is forecast at 7.3 million tonnes, up 4% from the previous year due to favourable weather and a diminished impact from citrus greening.

Orange juice production in 2017/18 (October–September) is forecast at 43 800 tonnes, down slightly from the 2016/17 estimate of 44 500 tonnes. Industry reports that consumer demand for ‘not from concentrate’ (NFC) juice is growing and Chinese processors can now sell high-quality NFC juice at over twice the price of ‘from concentrate’ (FC) juice. Industry contacts also report that production of FC juice continues to slowly decline as consumer demand weakens. Major Chinese orange juice processors are located in Chongqing and Sichuan provinces.

Orange juice domestic consumption is forecast at 96 200 tonnes, almost unchanged from the 2016/17 estimate. The USDA has increased consumption estimates by more than 30% due to reports from retailers that while demand for FC juice remains weak, consumption of NFC juice was unexpectedly strong, especially in top-tier cities as cold-chain infrastructure, marketing efforts and disposable incomes expand.

Orange juice imports in 2017/18 are projected at 55 000 tonnes, unchanged on the previous year. Based on Chinese Customs data, 2016/17 import estimations were increased significantly due to unexpectedly strong import demand from Chinese processors opting to import ingredients for juicing as opposed to utilizing domestic oranges which have increased in price. Orange juice exports in 2017/18 are forecast at 2 600 tonnes.

USDA data – South Africa – Orange

The production of oranges in the 2017/18 is forecast to increase by 2% to 1.43 million tonnes, from 1.40 million tonnes in 2016/17.

The production of orange juice is forecast to increase by 18% to 26 000 tonnes in 2017/18, from 22 000 tonnes in 2016/17. This is due to the increase in the quantity of fresh oranges delivered for processing and the higher juice extraction achieved as a result of the better quality of oranges.

The domestic consumption of orange juice is forecast to increase by 3% to 6 400 tonnes in 2017/18, from 6 200 tonnes in 2016/17, based on the increase in production and supply availability. The relatively high food price inflation has resulted in restricted growth in the domestic consumption of fresh fruit juices especially the one hundred percent fruit juice, and the shift in demand to orange juice concentrates.

Exports of orange juice in 2017/18 will increase by about 6% to 25 500 tonnes, from 24 000 tonnes in the 2016/17, based on the available supply and increase in production.

Producers in South Africa prefer to export fresh oranges rather than to sell to processors as export prices are eight times higher than prices achieved from processors. Netherlands, Botswana, Mozambique, Mauritius, Zambia and Zimbabwe are the biggest markets for South African orange juice exports.

USDA data – Australia – Orange

Production of fresh oranges is forecast at 480 000 tonnes in 2017/18, the same as the previous year, assuming average seasonal conditions.

The USDA forecasts 60 000 tonnes of fresh oranges will be processed into juice for 2017/18. Total orange juice production is forecast to remain at 7 000 tonnes in 2017/18.

In 2017, the national shortage of Navel oranges for fresh juice production led a number of processors to import orange juice concentrate for mixing with available fresh juice. Some processors used labels on juice bottles to

advise consumers on the use of concentrate. In mid-2018, Australia will introduce stricter country-of-origin labelling to all products, which will make it mandatory to label fruit juice made from either local or imported juice.

Growers have traditionally entered into 3-year contracts with juice processors for juice supplies, although shorter term contracts have been more common in recent years. Lower domestic prices offered by juice processors have encouraged farmers to switch to growing more profitable varieties such as Navel oranges and mandarins; away from Valencia oranges. This trend has resulted in smaller supplies for Valencia oranges, which is now impacting juice processors. In 2017, higher international demand for Valencia oranges has further reduced supplies for processing orange juice.

Orange juice consumption has fallen over the last decade from 49 000 tonnes in 2005/06 to 41 000 tonnes in 2012/13. The USDA expects a further decrease to 38 000 tonnes for 2017/18.

Per capita annual consumption of citrus fruit has declined over the last five years due to competition from other beverages such as iced tea and sports drinks. Health concerns are also driving consumers to move away from drinks with higher sugar content and imported concentrates.

Orange and apple juice are the most popular products on the Australian juice market, but many new competitive products have been introduced such as fruit and vegetable

juice combinations, organic juice varieties, cold pressed juice, coconut water, and mixtures with other beverages. Valencia oranges are harvested in winter, but are mainly consumed as juice in the summer, thus, some processors have used six various storage systems for juice, apart from freezing. Juice can be pasteurized and stored juice in 1,000-litre bladders at low temperatures to maintain juice supplies over the year.

Australia exports small quantities of orange juice - exports in 2017/18 are estimated at just 500 tonnes, which was revised down from 600 tonnes in 2016/17. Processors import orange juice and concentrate to meet overall domestic demand.

Imports of orange juice concentrate are expected to remain stable at 31 500 tonnes in 2017/18. Brazil is the main supplier of frozen orange juice concentrate (FCOJ).

USDA data - Morocco - Orange

Morocco's orange production for 2017/18 at 935 000 tonnes, a decline of 10% over 2016/17.

Orange juice production in 2017/18 at 35,000 tonnes, 43% lower than 2016/17 due to less availability for processing.

Orange juice exports for 2017/17 are expected to be lower at 3 000 tonnes and imports are projected to be higher at 3 100 tonnes. Morocco began exporting volumes of single-strength orange juice in 2016/17 to the Netherlands and France. ●

Juice Market

Juice Market is a monthly report covering the fruit juice concentrate market, it includes data, news and market reports to help producers and buyers make informed decisions.

For subscription details and to see a sample edition please contact:

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Fruit juice consumption in the Russian Federation

Taking three of the most traded juices on the market (orange, apple and pineapple) in both the concentrate and not from concentrate sectors, Fruit Juice Focus analyses consumption in the Russian Federation for the 12 month period October to September over the past five years (2012 to 2017).

Fruit juice not from concentrate

Consumption of imported fresh orange juice in the Russian Federation is low in comparison with many other countries and what consumption there is (see **table 1**) has been steadily on the decline over the past five years,

although levels have flattened out since October 2015. There is a notable drop of 69% when comparing the 12 month period October 2016 to September 2017 with the same period 2013/14. The majority of the countries featured in the table have shown a similar drop in exports to the Russian Federation.

Exceptions to this trend are Germany who has been a consistent exporter to the Russian Federation since the end of 2012 averaging 417 tonnes year on year and Belarus*, where the quantity of fresh orange juice has increased from the low volumes recorded four to five years ago to levels averaging 482 tonnes over the past three years.

Table 1. Russian Federation imports of orange juice not from concentrate (NFC) (tonnes)

Exporters	Oct 2012 - Sep 2013	Oct 2013 - Sep 2014	Oct 2014 - Sep 2015	Oct 2015 - Sep 2016	Oct 2016 - Sep 2017	% variance 2016/2017 versus 2015/2016
Germany	481	459	305	416	426	2%
Belarus	43	119	534	488	425	-13%
Finland	325	327	170	157	133	-15%
Belgium	287	253	114	109	103	-6%
Armenia	223	226	168	106	100	-6%
France	580	425	263	107	99	-7%
Others	4724	4211	1031	572	599	5%
World total	6663	6020	2585	1955	1885	-4%

Sources: ITC calculations based on Federal Customs Service of Russia statistics.

Table 2. Russian Federation imports of apple juice not from concentrate (NFC) (tonnes)

Exporters	Oct 2012 - Sep 2013	Oct 2013 - Sep 2014	Oct 2014 - Sep 2015	Oct 2015 - Sep 2016	Oct 2016 - Sep 2017	% variance 2016/2017 versus 2015/2016
Belarus	119	216	709	1279	1856	45%
Poland	776	752	418	322	419	30%
Germany	359	369	246	279	298	7%
Armenia	302	261	241	243	212	-13%
Italy	130	155	117	126	152	20%
Belgium	330	278	124	131	144	10%
France	546	399	290	163	143	-12%
Finland	352	243	155	80	99	23%
Others	4667	4029	569	682	486	-29%
World total	7581	6704	2870	3304	3809	15%

Sources: ITC calculations based on Federal Customs Service of Russia statistics.

Table 3. Russian Federation imports of pineapple juice NFC (tonnes)

Exporters	Oct 2012 - Sep 2013	Oct 2013 - Sep 2014	Oct 2014 - Sep 2015	Oct 2015 - Sep 2016	Oct 2016 - Sep 2017	% variance 2016/2017 versus 2015/2016
Belarus	47	108	147	314	255	-19%
Germany	121	139	87	105	100	-4%
Netherlands	1	0	0	0	56	
Italy	24	48	20	18	33	83%
Kazakhstan	6	5	5	31	22	-29%
Finland	125	113	41	12	21	85%
Thailand	30	11	10	11	20	91%
France	29	26	8	0	15	
Armenia	67	53	25	9	11	17%
Hungary	14	15	15	13	10	-20%
Philippines	210	101	99	0	0	
Belgium	86	75	26	0	0	
World total	923	899	533	527	556	5%

Sources: ITC calculations based on Federal Customs Service of Russia statistics.

Table 4. Russian Federation imports of orange juice from concentrate (FCOJ) (tonnes)

Exporters	Oct 2012 - Sep 2013	Oct 2013 - Sep 2014	Oct 2014 - Sep 2015	Oct 2015 - Sep 2016	Oct 2016 - Sep 2017	% variance 2016/2017 versus 2015/2016
Brazil	26515	21534	27572	32199	25123	-22%
Netherlands	7927	16304	5680	2746	2989	9%
Italy	548	607	383	475	2637	456%
Israel	2244	1607	1235	667	1389	108%
Spain	0	134	548	525	844	61%
Greece	576	296	0	63	228	264%
Mexico	140	0	0	0	225	
Argentina	1	0	5	0	112	
Belarus	40	88	31	70	95	35%
Belgium	5657	1799	711	112	28	-75%
Germany	216	556	102	25	20	-20%
Thailand	719	0	0	0	0	
Turkey	1	78	104	0	0	
Cuba	758	235	0	0	0	
World total	45426	43287	36387	36898	33714	-9%

Sources: ITC calculations based on Federal Customs Service of Russia statistics.

Both Spain and Israel have gone from being two of the largest exporters five years ago to substantially less in the last 12 months with volumes recorded down by 75% and 82% respectively. The Ukraine shows a complete cessation of exports by September 2014 from being the

largest exporter to the Russian Federation. This reported to be due to the political situation between the two countries.

Imports of fresh apple juice by the Russian Federation from countries worldwide are also on the decline following

Table 5. Russian Federation imports of apple juice from concentrate (tonnes)

Exporters	Oct 2012 - Sep 2013	Oct 2013 - Sep 2014	Oct 2014 - Sep 2015	Oct 2015 - Sep 2016	Oct 2016 - Sep 2017	% variance 2016/2017 versus 2015/2016
China	39758	45009	38791	61734	48256	-22%
Uzbekistan	5499	5160	2466	4602	11594	152%
Poland	362	864	24891	10415	11551	11%
Belarus	80	258	4295	5162	6149	19%
Iran, Islamic Republic of	4437	4677	1506	3134	3007	-4%
Moldova, Republic of	90	140	295	2832	2035	-28%
Azerbaijan	119	58	0	1200	795	-34%
Turkey	1	800	524	101	484	378%
Austria	171	246	276	7529	369	-95%
Netherlands	104	35	16	28	206	626%
Czech Republic	0	0	0	0	161	
Germany	333	277	229	154	127	-17%
Israel	243	219	112	101	62	-39%
Italy	76	44	70	56	57	2%
Ukraine	33971	21389	0	0	0	
Hungary	0	0	4047	0	0	
World total	85613	79214	77765	97193	84919	-13%

Sources: ITC calculations based on Federal Customs Service of Russia statistics.

a similar trend to that shown in fresh orange juice above. The figures (see **table 2**) show that the 3809 tonnes imported in the most recent analysis is 43% down on the 6704 tonnes imported four years ago and 15% down on the year previous.

Notable in the analysis is the substantial rise in imported fresh apple juice from Belarus* up 45% for the period ending September 2017 versus the same period 12 months before and a significant leap when comparing the 1856 tonnes exported by Belarus* to the Russian Federation compared with 119 tonnes for the period 2012-2013 - up 1559%.

Poland was the largest exporter back five years ago - 776 tonnes - and is now only supplying just over half that amount at 419 tonnes occupying second place to Belarus* top spot. Germany in third place remains consistent in the annual quantities supplied with Armenia also showing consistent exports to the Russian Federation up until this past year where figures show a 13% drop against the previous period.

Fresh pineapple juice consumption (see **table 3**) has been very stable during the past three 12 month periods analysed averaging just over 500 tonnes per year having

dropped from a high of 923 tonnes five years ago. Germany again remains a regular supplier albeit at fairly low volumes, averaging 110 tonnes over the five years recorded and maintaining second spot to Belarus* who during the past year were exporting twice as much in terms of volume than Germany. The Netherlands have entered the picture this last year with a minimal amount of 56 tonnes up from zero in the three years prior to that. Both Finland and the Philippines were showing reasonable amounts of exports to the Russian Federation four to five years ago but have dropped away in the last two years to 21 and zero tonnes respectively.

Fruit juice concentrate

As would be expected the Russian Federation imports most of its orange juice concentrate from Brazil - 75% in the most recent period recorded (see **table 4**) where imports from Brazil stood at 25123 tonnes out of the world total of 33714 tonnes. The Netherlands in the past have been one of the larger exporters to the Russian Federation peaking at 16304 tonnes (38%) of the total consumption back in the period October 2013 to September 2014 but even then, Brazil was way ahead supplying 50% of the total. The

Table 6. Russian Federation imports of pineapple juice concentrate (tonnes)

Exporters	Oct 2012 - Sep 2013	Oct 2013 - Sep 2014	Oct 2014 - Sep 2015	Oct 2015 - Sep 2016	Oct 2016 - Sep 2017	% variance 2016/2017 versus 2015/2016
Netherlands	6211	6544	4094	2145	2000	-7%
Thailand	3130	1834	1888	122	768	529%
South Africa	1524	531	247	229	515	125%
Israel	518	86	198	292	242	-17%
China	0	40	440	280	200	-29%
Brazil	0	21	26	66	69	5%
Italy	51	64	58	61	56	-8%
Belarus	14	11	8	17	43	151%
World total	11862	9644	7097	3242	3934	21%

Sources: ITC calculations based on Federal Customs Service of Russia statistics.

Netherlands have since then slipped back to 2989 tonnes for the last recorded period at just 9% of the total.

Italy has shown significant growth in exports over the past two years rising from a total of 475 tonnes for the period October 2015 to September 2016 up to a total of 2637 tonnes for the most recent period October 2016 to September 2017 - representing an increase of 456%. Similarly, Spain has jumped up the ranks to 5th place with a total of 844 tonnes supplied to the Russian Federation for the most recent period recorded - 61% up compared with the previous period.

Israel has been a consistent supplier over the past five years despite a drop of nearly 50% two years ago and sits in fourth place in the current analysis with 1389 tonnes of orange juice concentrate supplied.

Belgium has dropped from third place five years ago when it was exporting 5667 tonnes into the Russian Federation to an almost non-existent figure of 28 tonnes this past year.

Apple juice concentrate is the most popular of the three fruit juices analysed in this issue of Fruit Juice Focus with the Russian Federation consuming 84919 tonnes of apple juice concentrate compared with 33714 tonnes of orange juice concentrate consumed during the period October 2016 to September 2017. In terms of suppliers of apple juice concentrate - China is way ahead, exporting 48256 tonnes to the Russian Federation during the above period which equates to 57% of the total supplied by all the countries listed (see **table 5**). The Russian Federation is consuming 13% less apple juice concentrate than it was two years ago where in the period October 2015 to September 2016 figures were at a five year high of 97193 tonnes of which 61734 tonnes (64%) were imported from China.

Uzbekistan has climbed up to second place in the current exporter rankings with 11594 tonnes being shipped to the Russian Federation in the most recent period - up from their previous total of 4602 tonnes. Imports from Poland, who sit in third place, have fluctuated quite considerably in the past five years flattening out at 11551 tonnes in the most recent period - up 11% on the period before.

Belarus* has also risen up the ranks of suppliers in recent years exporting 6149 tonnes in the most recent period against a figure of just 80 tonnes five years ago.

The Ukraine - once a significant player five years ago has stopped exporting to The Russian Federation in the past three years reportedly due to the political climate.

Consumption of pineapple juice concentrate has dropped from 11862 tonnes for the period recorded five years ago to 3934 tonnes this last period analysed - a decline of 67% (see **table 6**). But there has been a 21% upturn this past recorded 12 months of 21% compared with the previous 12 months - albeit from a much smaller base. The Netherlands export the largest amount of pineapple juice concentrate into the Russian Federation - just over 50% - and has been the top supplier consistently during the past five years.

Imports from Thailand have dropped away in recent years to just 768 tonnes compared with 3130 tonnes five years ago. Similarly, South African imports have dropped from 1524 tonnes to 515 tonnes for the same period

Source: Fruit Juice Focus from trade statistics

*Footnote: The Russian Federation's foreign trade customs statistics exclude trade with the Republic of Belarus and the Republic of Kazakhstan. ●

IFU Technical Workshop

19.03.2018

Cologne, Germany



In conjunction with AIJN and SGF:

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Anuga Foodtec (March 20-23, 2018) is the world's leading supplier trade fair for the food and beverage industry. Here, you can find all solutions and ideas for the production and processing of foodstuffs just next to each other – related to processing technologies, bottling and packaging technology, ingredients and food safety.

Workshop Program:

Time		Section	Title	Presenter	Organisation
From	To				
10,00	10,10	Opening	Welcome	Dirk Lansbergen	Citrosuco
10,15	10,35		Supporting Organic agriculture		
10,40	11,00		Supporting conventional agriculture	tba	Syngenta
11,00	11,20		Q&A		
11,25	11,55	Processing	Vegetable juice and concentrate processing	Mia Schellekens	SVZ
12,00	12,30		Rheology of juices and concentrates	Antonio Trifiro	Stazione Sperimentale di Parma
12,30	12,40		Q&A		
12,40	14,00	Lunch			
14,00	14,30	Analysis	Ergosterol as a measure of fruit quality	Achim Gessler	riha WeserGold
14,35	14,55		Spanish NFC orange juice Isotopic values	Dr. Ana Isabel Cabañero Ortiz	Spanish Ministry of Agriculture and Fisheries, Food and Environment
15,00	15,30		Ion Chromatography for the analysis of Fruit Juices and Fruit Juice Preparations	Dr. Detlef Jensen	ThermoFisher
15,35	16,05		New IFU 12. Detection of Alicyclobacillus	Barbara Gerten	Merck
				Antonio Deban Valles	Neogen Europe
16,05	16,30	Break			
16,35	17,05	Food fraud	Risk based quality management in the global fruit juice industry - Fighting food fraud with SGF	Markus Jungen	SGF
17,10	17,40	Technology	Carton technology	tba	SIG
17,45	18,15		Biofortification of soft fruits	tba	James Hutton Institute
18,20	18,30	Close	Closing remarks and thanks	John Collins	IFU

Technical Visit:

Join us for the Technical Visit on Tuesday, March 20, 2018 by ordering your ticket together with the workshop ticket. There will be a bus leaving from Motel One Cologne-Waidmarkt in the morning, taking us first to see Haus Rabenhorst, a juice bottling plant in Unkel, and second to SIG Combibloc in Linnich to have lunch and visit the factory.

Find details on accommodation, location, additional meetings

(IFU Commissions, etc.) on ifu.eventbrite.com

Would you like to see your logo on this flyer, on our website or during the IFU Technical Workshop? Get in touch with our Marketing Director Maria Schlaffer
maria@ifu-fruitjuice.com

Monday, March 19, 2018:

10.00 – 18.30

Technical Workshop at
Cologne Exhibition Center

20.00 – 23.30

Networking Dinner at
Hoehnerstall, Cologne

Tuesday, March 20, 2018:

Technical Visit OR
Commission Meetings

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If your association wishes to submit any event details or news items please email ben@fruitjuicefocus.com

SGF-IFU Africa Road Show 2018

SGF International e.V. (SGF) and International Fruit and Vegetable Juice Association (IFU) are holding a third edition of the SGF-IFU Road Show, after the successful tours 2016 (Latin America) and 2017 (Asia). The SGF-IFU Road Show consists of five seminars for the juice industry that will be held in five different African Countries.

The objective of the Road Show is to get closer contact to the African juice producers, present IFU and SGF's activities and inform the local industry about global trends and innovation in the technical sector.

The IFU and SGF are happy that they can work together with the local associations like the South African Fruit Juice Association (SAFJA), the Association des Producteurs Algériens de Boissons (APAB) and the Arab

Beverages Association (ABA) and are excited that the 2018 seminars will even include – depending on the location – technical visits, networking events and much more.

Companies who would like to sponsor the whole tour or one of the seminars can get in touch with IFU's Marketing Director Maria Schlaffer to discuss further details: maria@ifu-fruitjuice.com

The seminars:

- Lagos (Nigeria) end of April 2018
- Cape Town/Stellenbosch (South Africa) on May 9th, 2018
- Cairo (Egypt) in Sept 2018
- Nairobi (Kenya) in September 2018
- Algiers (Algeria) on October 1st, 2018

Why you should be including Fruit Juice Focus (FJF) in your advertising schedule:

The logo for 'fruit juice FOCUS' features the words 'fruit juice' in a bold, lowercase, sans-serif font, with 'fruit' in red and 'juice' in orange. Below 'juice' is the word 'FOCUS' in a smaller, bold, uppercase, sans-serif font, colored red. The letters in 'fruit juice' are filled with a pattern of small, colorful dots.

- FJF is the new online magazine from Juice Market
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fruit juice FOCUS

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