



The Future of Juice

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AGRANA at a glance



Sugar

- Sugar is sold to:
 - Consumers
 - Manufacturers of:
 - Soft drinks
 - Confectionery
 - Fermentation industry
 - Other food and beverage industries

Starch

- Starch is used in food processing and for technical purposes
- Bioethanol

Fruit

- Fruit juice concentrates for fruit juice and beverage bottlers and fillers
- Fruit preparations; special customized for following industries:
 - Dairy
 - Baked products
 - Ice cream

AGRANA Juice Products



	CONCENTRATE	NATURAL FRUIT JUICE AROMA	NFC JUICES	FRUIT WINES
Apple	■/Organic/Baby Food	■	■/Organic	■
Pear	■			■
Cherry	■	■	■	■
Blackcurrant	■	■	■	■
Strawberry	■	■		■
Raspberry	■	■		■
Aronia	■			
Elderberry	■/Organic			■
Redcurrant	■	■		■
Plum	■			■



12 AGRANA Juice Plants





The EU Commission has approved the joint venture between **AGRANA Juice Holding GmbH** and **Ybbstaler Fruit Austria GmbH**.

Ybbstaler Fruit Austria GmbH runs two factories in Poland and one in Austria.

The newly created joint venture **YBBSTALER AGRANA JUICE GmbH** will have its head office in Austria and production sites in Austria, Denmark, Germany, Hungary, Poland, Romania, the Ukraine and China.

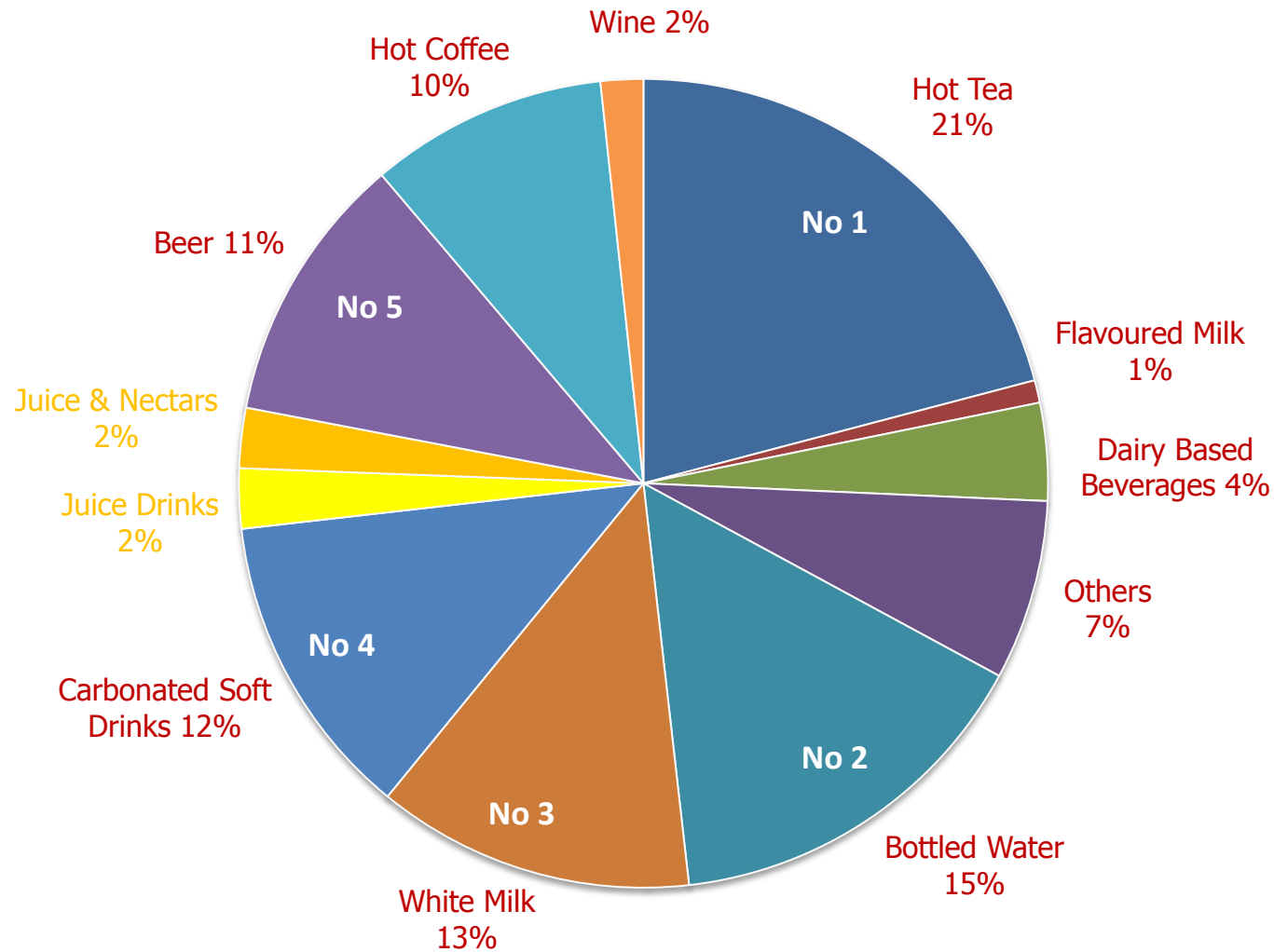




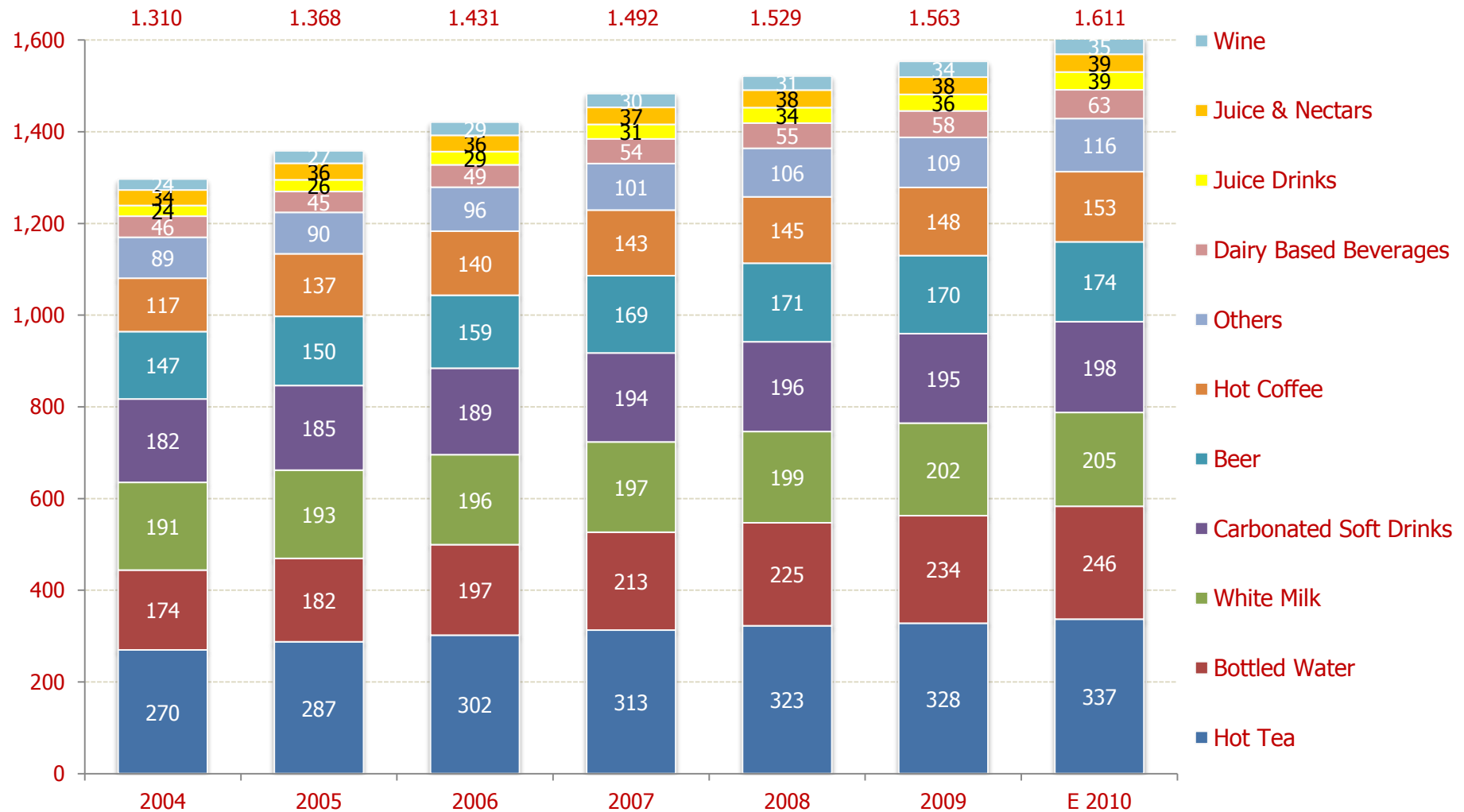
Global & EU Consumption

Global Beverage Consumption 2010

Total of 1.611 bn liters



Evolution of Global Consumption in bn liters



Source: Elaborated by Markestrat from Tetra Pak and Euromonitor Data

Fruit Juice Consumption EU 1985-2010

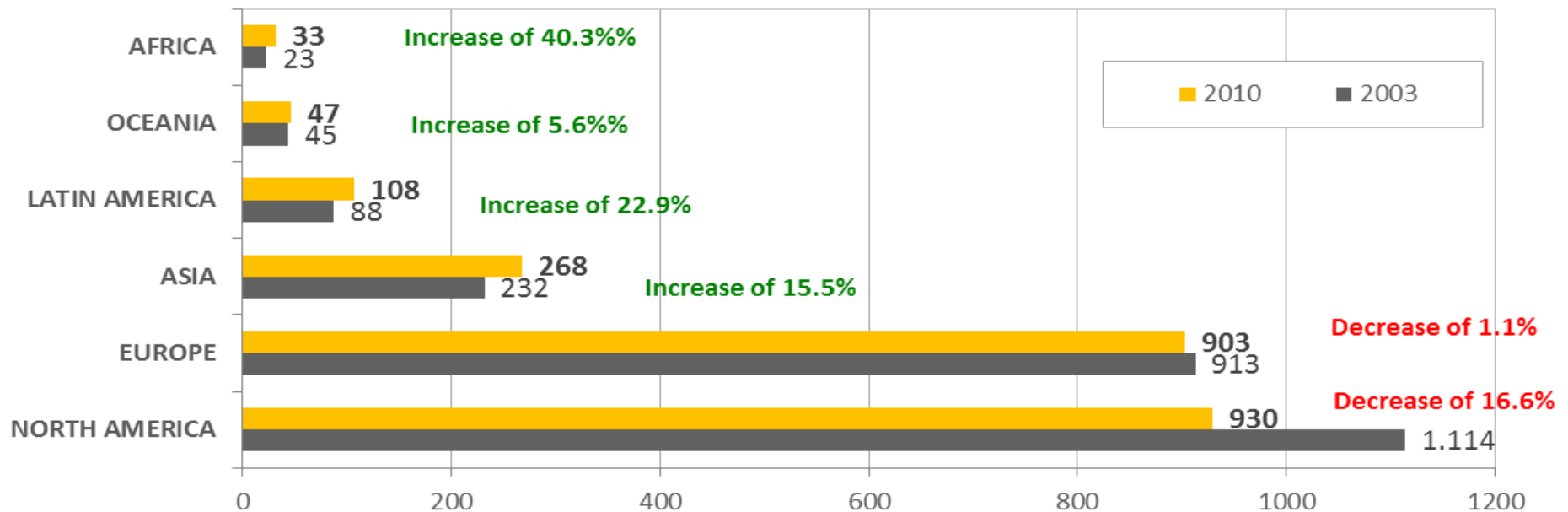
per capita in liters



	1985	1990	1995	2000	2005	2010
Germany	25,20	39,60	40,70	40,60	40,00	↓ 36,30
France	4,20	8,30	16,50	22,40	24,60	26,90
Netherlands	18,30	22,00	24,40	26,10	26,20	27,90
Belgium/Luxembourg	10,20	14,50	19,40	20,10	21,20	20,90
Italy	4,70	7,50	9,00	11,30	14,90	13,60
UK	12,00	17,90	19,60	19,30	23,50	22,60
Ireland	5,30	8,00	10,40	14,70	16,30	↓ 11,90
Denmark	15,70	18,60	18,50	20,90	22,40	21,80
Greece	1,30	4,60	6,60	15,90	14,50	14,60
Spain	6,30	11,50	15,40	20,00	28,10	↓ 23,50
Portugal	0,60	2,30	5,30	10,60	10,00	11,00
Austria	n.a.	n.a.	31,40	32,50	26,60	28,70
Sweden	n.a.	n.a.	20,10	21,70	21,30	↑ 27,60
Finland	n.a.	n.a.	23,60	29,50	32,10	31,20
Czech Rep.	n.a.	n.a.	n.a.	n.a.	14,10	↓ 9,90

Comparison
2005 - 2010
increase - decrease

Orange Flavor Beverage Consumption in '000 tons FCOJ 66° Brix



Juice Consumption Germany 2004-2011 per capita in liters

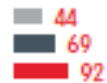


	2004	2007	2010	2011
Coke and Coke Mix Drinks	33,20	33,10	28,90	29,00
Diet Coke and Coke Mix Drinks	7,10	7,90	9,90	9,60
Lemonades	37,30	41,20	37,20	37,00
Diet Lemonades	1,20	1,20	3,30	4,30
Others	5,30	7,40	4,30	4,39
"Schorle"	n.a.	n.a.	7,70	7,70
Flavoured water	n.a.	n.a.	5,90	6,50
Dietary softdrinks	2,00	3,10	1,50	1,50
Enriched drinks and energydrinks	1,40	1,20	2,60	2,90
Coffee & Tea drinks	8,40	6,60	6,20	6,10
Fruit Juice	12,00	10,00	8,60	8,60
Diet Fruit Juice	0,80	0,70	0,40	0,30
Carbonated Softdrinks	4,00	3,50	1,10	1,00
Diet Carbonated Softdrinks	0,70	0,60	0,50	0,60
Soft Drinks (in total)	113,40	116,50	118,20	120,10
Mineral water	126,70	136,60	130,90	134,70
Soda water	6,10	6,50	5,40	5,10
Mineral water (in total)	132,8	143,1	136,3	139,8
Apple juice	12,88	11,35	8,10	n.a.
Orange juice	9,24	8,32	8,65	n.a.
Grape juice	1,31	1,25	1,00	n.a.
Grapefruit juice	1,32	0,36	0,30	n.a.
Pear juice	0,3	0,26	0,20	n.a.
Vegetable Juice & Nectar	0,99	1,35	1,20	n.a.
Lemon Nectar	7,35	7,2	6,00	n.a.
Other Juice & Nectars	8,26	8,21	10,80	n.a.
Juice & Nectar (in total)	40,65	38,3	36,25	

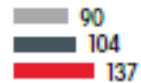
European per capita consumption of all Coca-Cola Company Beverages*



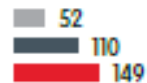
Worldwide



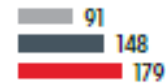
Italy



France



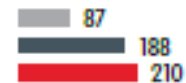
Europe Operating Group



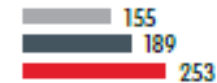
Germany



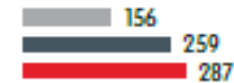
Great Britain



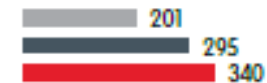
Austria



Spain



Belgium



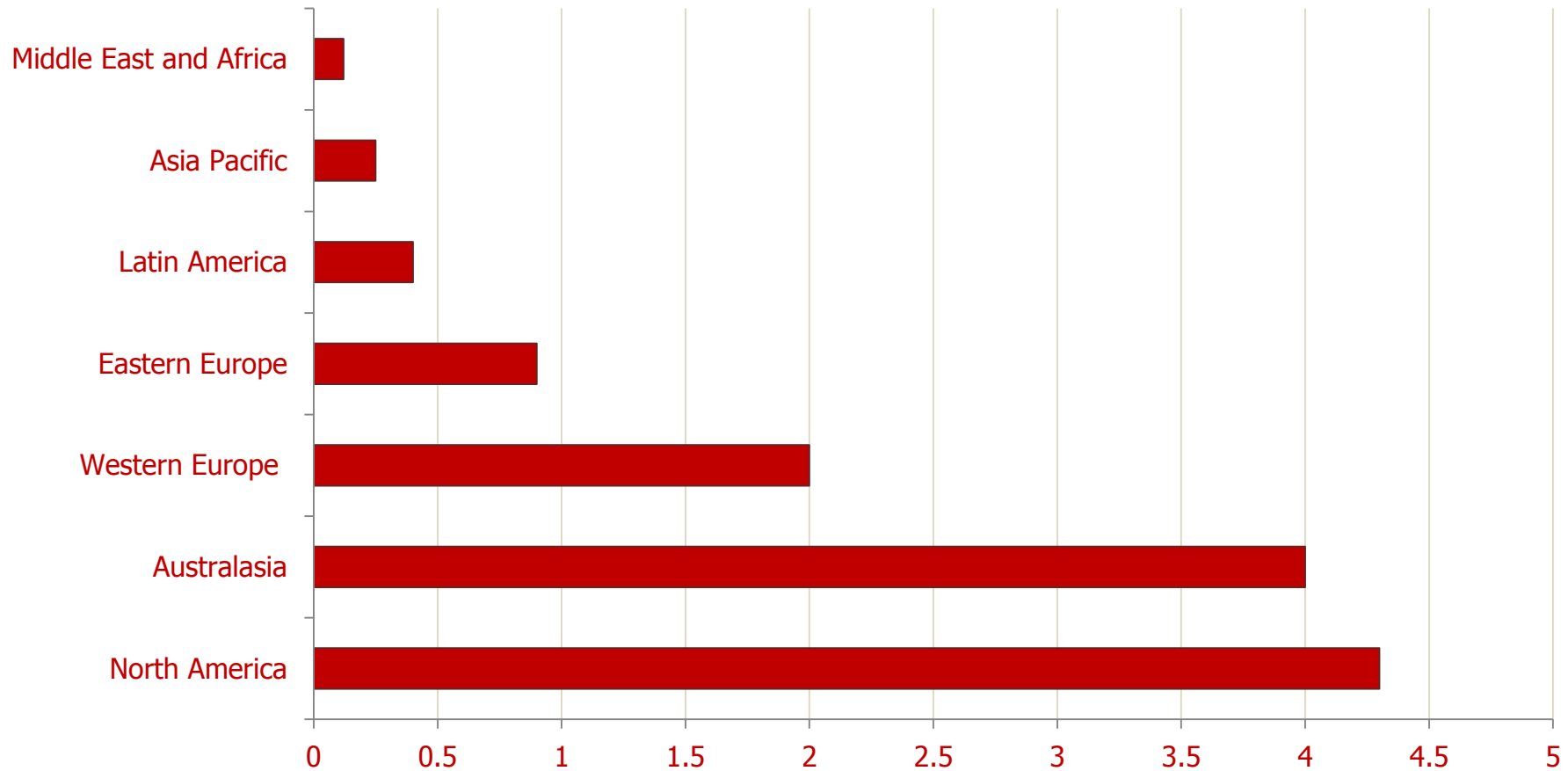
*consume
per person
in 2011

Source: Coca-Cola

Global Sales of Red Bull Energydrinks in bn cans



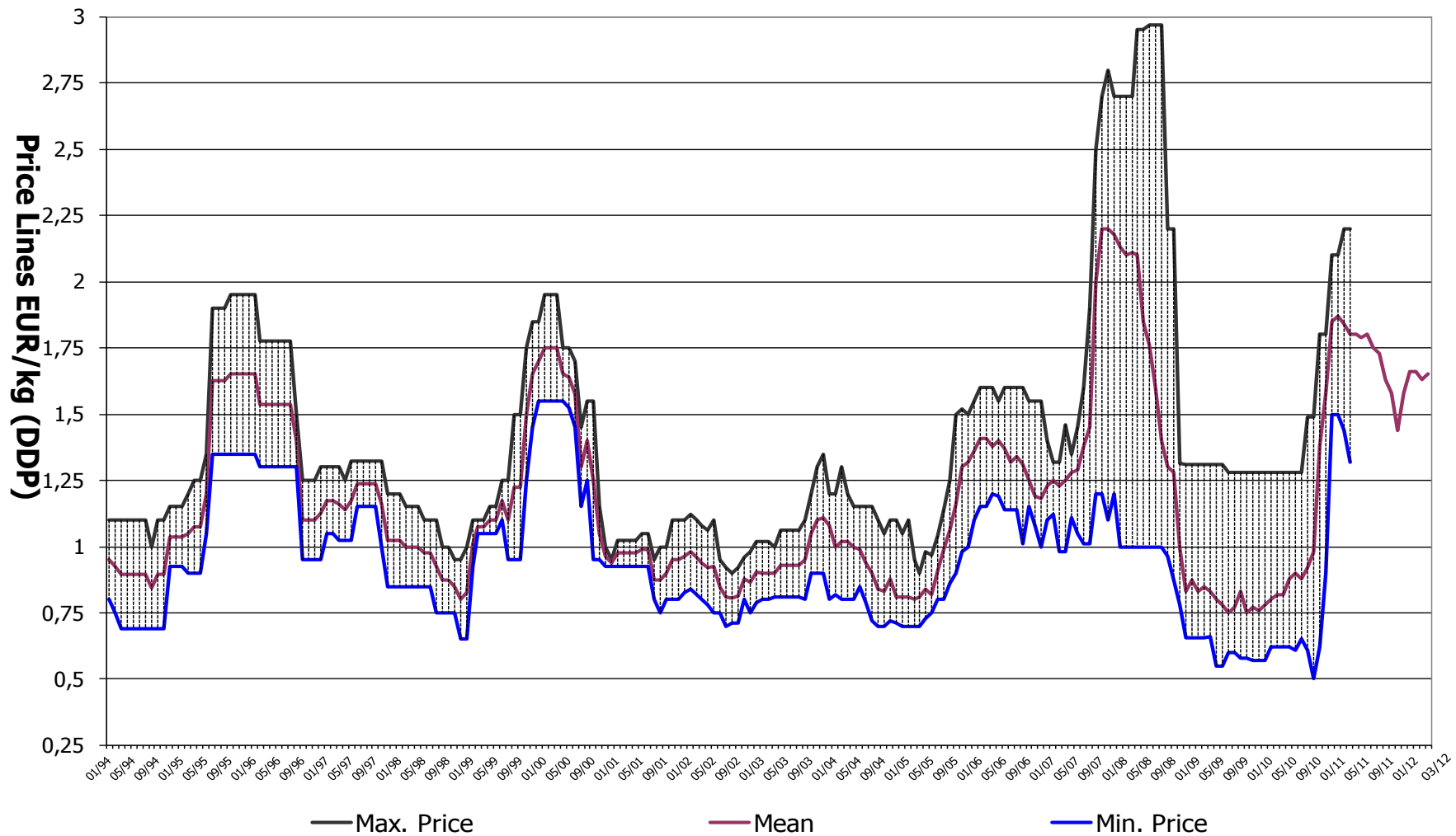
Energy Drinks total consumption 2010 in liters per capita



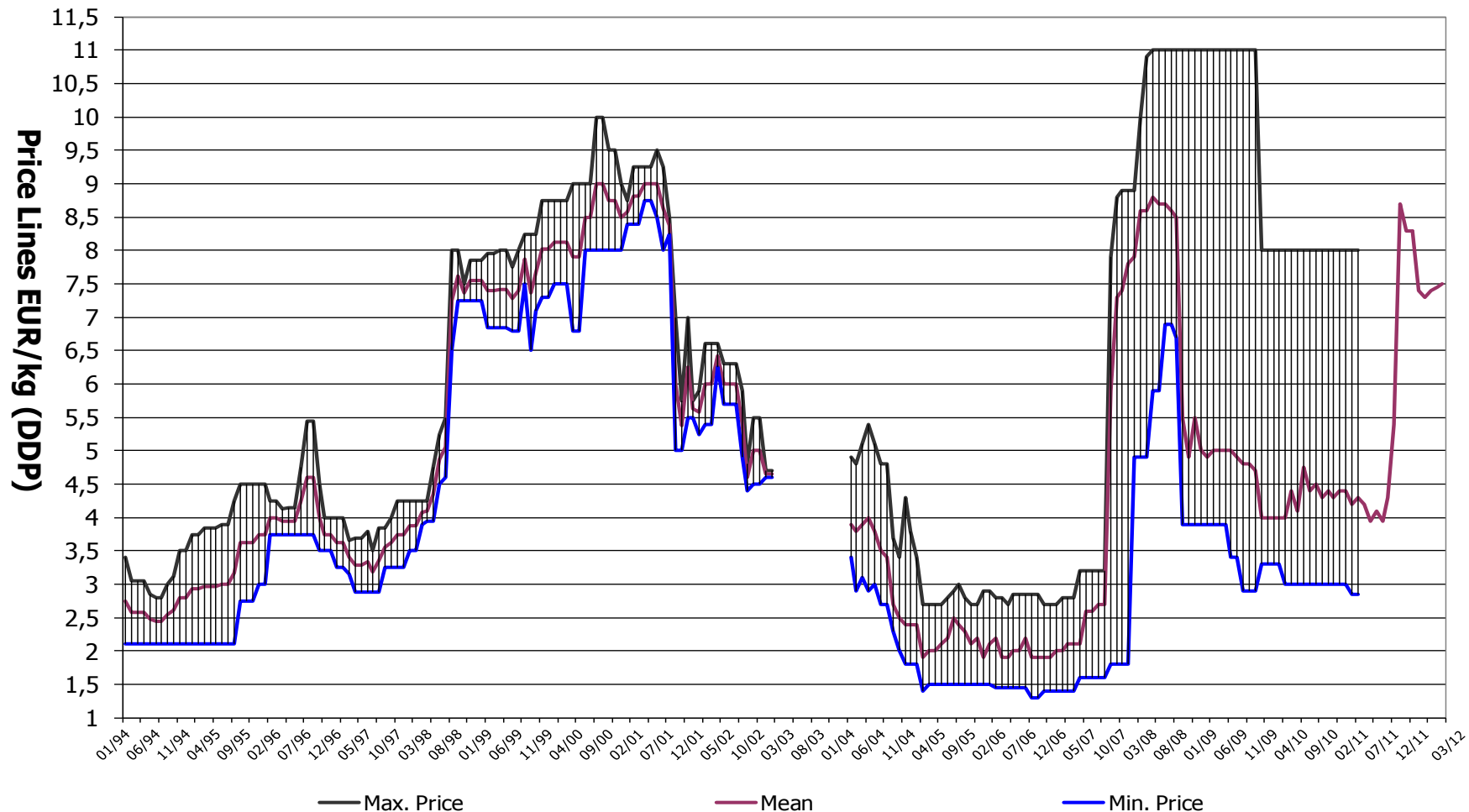


Prices for semi-finished products

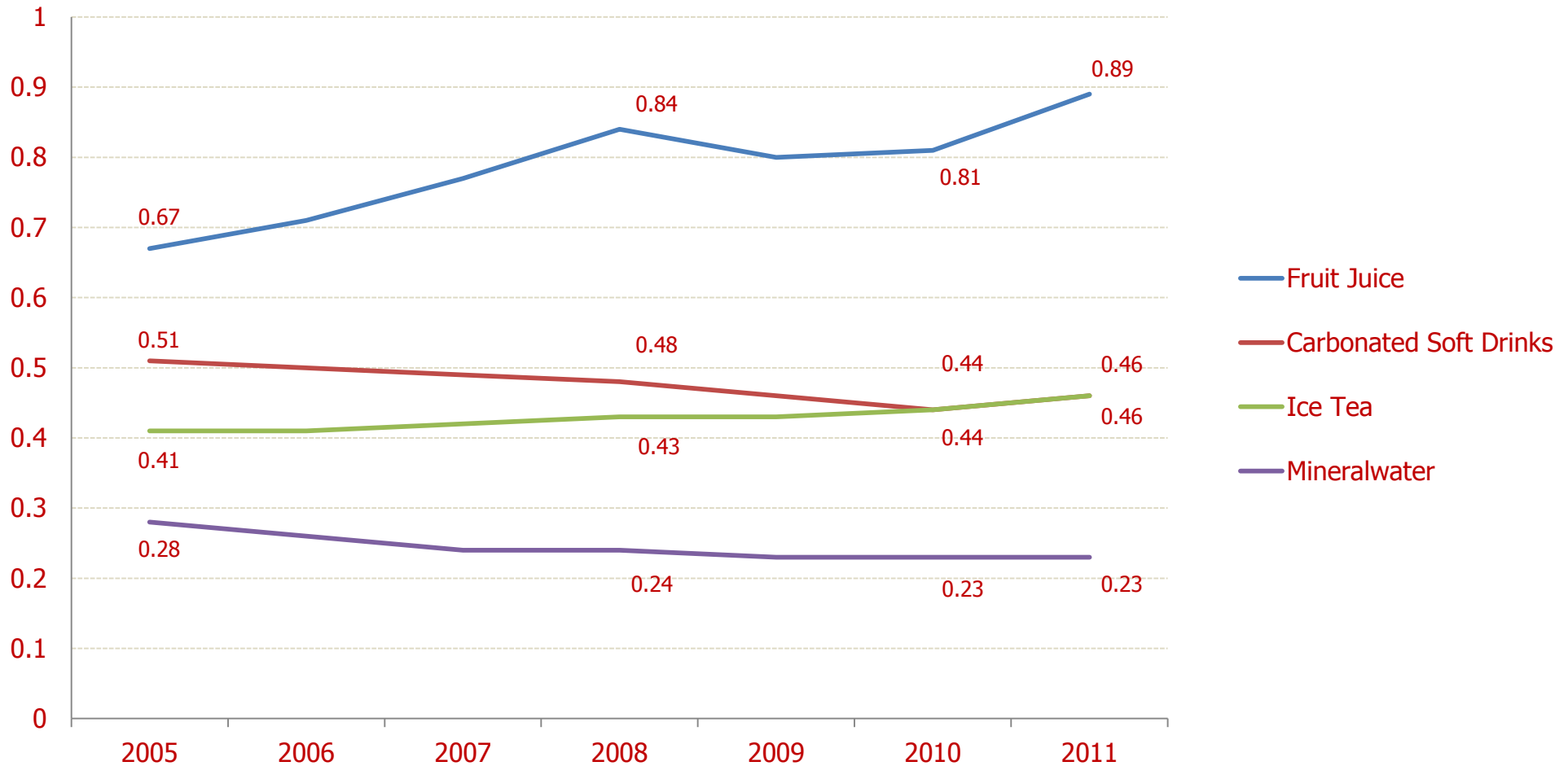
Market Price Report – European AJC (Jan. 1994 – March 2012)



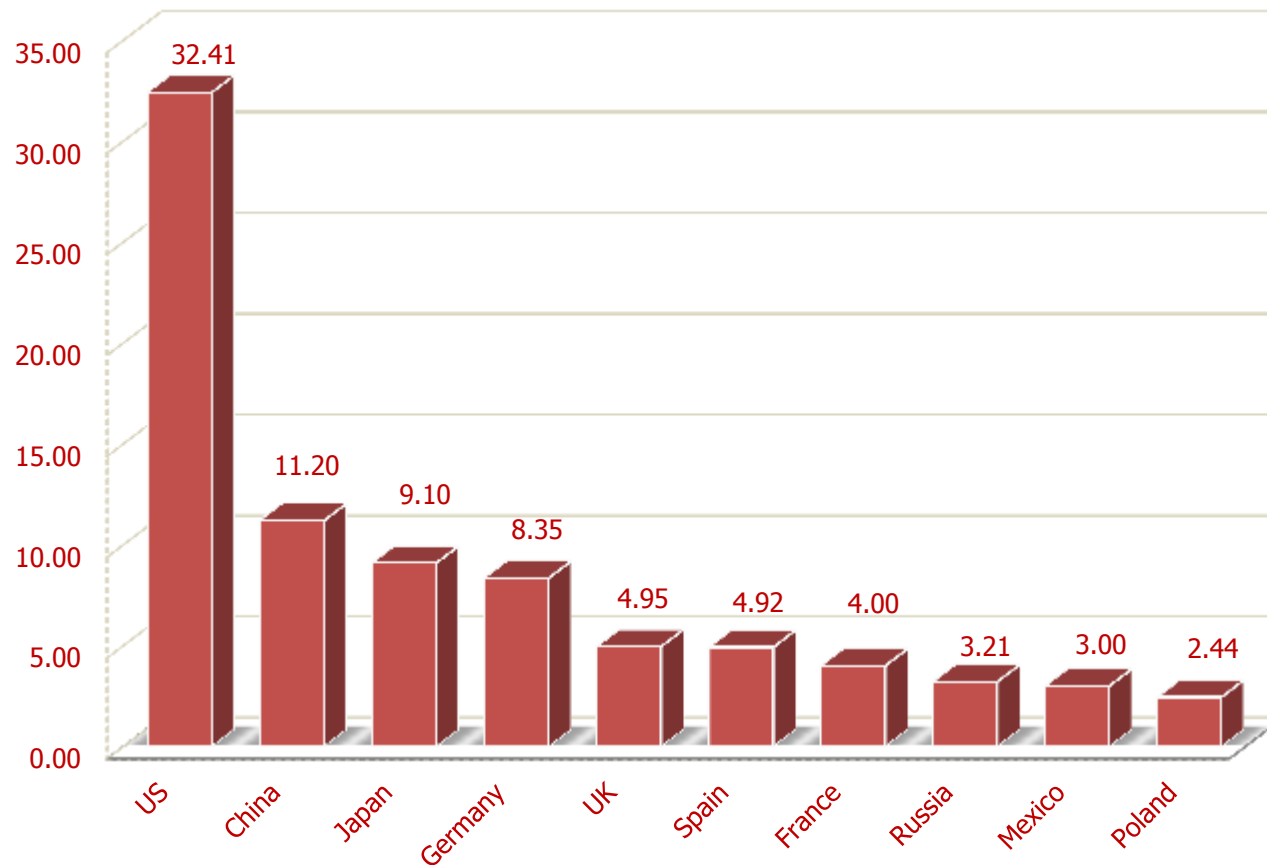
Market Price Report – Blackcurrant JC (Jan. 1994 – March 2012)



Non-alcoholic beverages in Germany price in €/per liter



Top 10 Fruit Juice & Nectars Markets by value in USD billion





Key Trends

Key Fruit Juice Trends



...more than **3.900 new juice** and **nectar products** launched in 2011, mainly in Europe, Asia and South & Central America

...time-poor consumers longing for a **less complicated life** have a **demand** for **simplified** and **familiar products** as well as **organic** and **fairtrade**

...consumers expect **unique flavours** inspired by **international** and **cross cultural influences**

...**9** out of **10** people worldwide are **unhappy** with their **weight. dietary products** continue to grow

..."**health** and **wellness**" – are the keywords in successful advertising

Future Trends



The compound between soft drinks and dairy beverages continues to attract global beverage companies such as Coca-Cola, PepsiCo, Suntory and Danone.

Coca-Cola also explores newer segments such as energy drinks, hot drinks and soybased beverages.

Also important to consumers is a wide range of exotic fruit juice flavours and a large assortment of health & wellness beverages.

More than 500 brands of energy drinks are now on the market, and it is estimated a five-billion dollar/year industry in the US.

Future Trends

Global marketshare



It's expected that the consumption of **100% fruit juice** is going to decrease the next years

2000	6%
2011	3,8%
2016e	3,3%

But beverages with a **fruit juice content** could increase

2000	14,6%
2011	15,1%
2016e	16,3%

Influence on consumer buying decisions on fruit juice?



1) Which Juice?

NFC

Nectars

Fruit Juice



2) Which Fruit?

Favourite fruit

Hip fruit



3) Which Brand?

Private-Label

Branded-Label

Advertising

Favourite

Organic





Start early to teach kids & teens how to become healthier

- Change buying behaviour
- Away from demineralizing energy drinks
- Move towards more fresh fruit and fresh juice intake
- From Fast-Food ➡ Healthy-Food





Promotion and Marketing

What will you get if...



...you take an apple and plant it in the ground?



What will you get if...



...you take an apple and plant it in the ground?



What will you get if...



...you take a burger and plant it in the ground?



What will you get if...



...you take a burger and plant it in the ground?



What will you get if...



...you squeeze fresh blackcurrants?



- Rejuvenation
- Energy boost
- Purification and detoxification
- Reduction of Inflammation
- Prevention of cell-damage
- Seed oil for skin treatments
- Cardiovasculare Strengthening
- Antirheumatic effect
- Immune system boost