Fruit/vegetable Juice - Vietnam

Euromonitor International : Country Sector Briefing

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FRUIT/VEGETABLE JUICE IN VIETNAM

HEADLINES

- In 2010, off-trade volume sales increase by 20%
- Rising health awareness is the key driver of fruit/vegetable juice’s improved performance in 2010
- 100% juice registers the fastest total volume sales growth of 42% in 2010
- The average unit price increases in 2010 due to inflation
- Vinamilk remains the leading brand in 2010
- Over the forecast period, off-trade volume sales are expected to grow by a 16% CAGR

TRENDS

- In 2010, fruit/vegetable juice became more popular as Vietnamese consumers paid more attention to healthier drinks. They believe that these products are high in vitamins and minerals which are good for their skin and general health.
- In 2010, total volume sales grew by 20%, compared to a 16% increase in 2009. Although packaged fruit/vegetable juice has been present in Vietnam for more than 10 years, it did not receive high attention from consumers due to the popularity of carbonates. Moreover, consumers tended to consider eating fresh fruit to be a better option than drinking packaged juice. However, the ongoing maturity of carbonates, increasingly busy lifestyles, and rising health and wellness awareness have made consumers more receptive to the nutritional and convenience benefits of fruit/vegetable juice.
- 100% juice recorded the fastest total volume growth in 2010 despite carrying the highest unit prices. Higher average incomes have made 100% juice more affordable than in the past. Consumers choose reconstituted 100% juice because they believe is fresher and healthier than other types of fruit/vegetable juice, which are thought to contain preservatives and added artificial flavours.
- In 2010, the average unit price of fruit/vegetable juice increased due to inflation and higher transportation costs. Furthermore, the devaluation of the local currency against the US dollar led to higher unit prices as many fruit/vegetable juice brands are imported.
- Nectars and juice drinks also recorded faster total volume sales growth in 2010 compared to 2009, in line with rising health awareness. 100% juice is usually available in 1-litre liquid cartons, while unfrozen nectars and juice drinks are more flexible in terms of pack sizes and formats. Unfrozen nectars and juice drinks are usually consumed in restaurants or cafés as thirst quenchers due to their lower prices and convenience aspects, while 100% juice is usually consumed at home.
- Orange and apple are among the most popular flavours. Most consumers are familiar with these traditional flavours and they are easy to drink and match with different types of food. In addition, many people believe that orange and apple juice products are higher in vitamins and minerals, compared to other flavours.
- The consumption of fruit/vegetable juice in the on-trade channel is much smaller than in the retail channel. This is mainly because consumers usually pay less attention to health aspects when dining out, or at parties and other social gatherings. Another main reason is that fruit/vegetable juice usually carries higher prices than standard drinks (usually carbonates or iced tea) in horeca outlets. Thus, consumers prefer to drink carbonates or iced tea in on-trade establishments.
- Sales of smoothies remained negligible in 2010. There were only a few products available. Moreover, almost all were dairy-based smoothies, and thus were not classified under soft drinks. Some famous smoothie products include V-Fresh Orange and Strawberry from Vietnam Dairy Products. Manufacturers paid little attention to smoothies as fresh smoothies can easily be found in cafés in most of the country’s major cities.

COMPETITIVE LANDSCAPE

- Vietnam Dairy Products leads thanks to its well-known and trusted Vinamilk brand name and strong distribution network. Local consumers were familiar with many of Vinamilk's products, including baby food and dairy products, before Vietnam opened its doors to multinational players. With its long-established presence and high experience, the company was able to build a nationwide distribution network, reaching from major cities to rural areas, able to satisfy consumers throughout Vietnam.
- In 2010, Vietnam Dairy Products recorded the biggest sales growth in 2010. Company sales grew by 54% in off-trade value terms to reach a 22% share and by 56% in off-trade volume terms to reach a 20% share. Although it was producing fruit juice long before the review period, Vietnam Dairy Products only started to focus on fruit/vegetable juice from 2008-2009. Recognising the strong growth potential of fruit/vegetable juice, the image of its whole range was revamped, with new packaging design, a new name and advertisements targeted at more sophisticated and modern consumers. The success of this strategy enabled the company to record dynamic sales growth, overtaking Interfood Shareholding Co and Dona New Tower JV Co to become the leading player in off-trade volume and value terms in 2010.
- In mid-2010, Coca-Cola Beverages relaunched Minute Maid as Minute Maid Teppy, offering products containing real fruit pulp. With strong advertisements and marketing events, the new products gained some attention. However, fruit juice with real pulp is not a new concept in Vietnam, and the new offering recorded only slight off-trade value share growth.
- Domestic players performed better than international manufacturers in 2010. This is largely because domestic manufacturers, such as Vietnam Dairy Products and Dona New Tower, possess wide distribution networks and long-established histories in the country. Moreover, most domestic manufacturers offer similar quality products to multinational brands, but at lower prices. For example, 1-litre V-Fresh is priced at VND24,000, compared to VND36,000 for 1-litre Malee. Thus, it is easier for local players to tap into the mass market.
- In 2010, one of the most notable new product developments was Casino Bio, Big C's new private label. Made from organic fruits and vegetables, Casino Bio's prices are above-average at VND45,000 per 1-litre glass bottles. Besides high pricing, low consumer awareness of organic produce and its benefits represents a challenge to the new private label in fruit/vegetable juice. However, Casino Bio has added diversity to the category and it appeals to the niche of wealthy consumers who are searching for premium quality products.
- During the review period, Casino and Casino Bio appeared to be the only major private labels in fruit/vegetable juice. They offer premium products, imported from France. Casino Bio can be considered the first mainstream organic product line in the country.

PROSPECTS

- With improving living standards and better education, consumer awareness of health and wellness issues is expected to continue to rise. Some consumers, especially females, are likely to become more concerned about their calorie intake. As a result, fruit/vegetable juice will gain popularity thanks to its various health benefits, such as high fibre content and skin care properties. Over the forecast period, total volume sales of fruit/vegetable juice are expected to grow by a 16% CAGR, only slightly slower than over the review period.
- More brands will enter fruit/vegetable juice in Vietnam in the forecast period in response to growing demand. Domestic brands will face strong competition from international competitors. Despite higher prices, imported brands can quickly gain the attention of consumers. Vietnamese consumers tend to perceive international brands to be higher in quality than local alternatives. Consequently, domestic manufacturers such as Vietnam Dairy Products and Saigon Beverages need enhance their branding and marketing activities to maintain the trust and loyalty of Vietnamese consumers.
- 100% juice is projected to register the fastest total volume and value sale growth over the forecast period. International brands such as Malee, Ceres, Tipco and Welch's focus on 100% juice, and they are expected to grow shares by strengthening their distribution networks and discounting activities. Another reason for the faster expansion of 100% juice is the growing middle- and high-income population in Vietnam, particularly in big cities. These consumers are the key purchasers of reconstituted 100% juice.

- The rate of inflation is anticipated to have a big effect on the Vietnamese economy, as electricity and water bills are set to increase. In addition, the local currency is losing value to the US dollar. Hence, unit prices of fruit/vegetable juice are predicted to increase in current value terms over the forecast period as most of these products are imported.
- According to the company's annual report, Vietnam Dairy Products might introduce new products or improvements in fruit/vegetable juice over the forecast period, in order to respond to the rising health and wellness awareness. For example, manufacturers are likely to expand their portfolios with more juice flavours to give local consumers more choice. More vitamins and minerals will also be added to juice to satisfy the increasing demand for healthier products from consumers.

CATEGORY DATA

Table 1 Off-trade Sales of Fruit/Vegetable Juice by Category: Volume 2005-2010

'000 litres

	2005	2006	2007	2008	2009	2010
100% Juice	1,480.0	2,140.0	3,047.4	5,360.3	7,445.5	10,572.6
- Frozen 100% Juice	-	-	-	-	-	-
- Not from Concentrate 100% Juice	-	-	-	-	-	-
- Reconstituted 100% Juice	1,480.0	2,140.0	3,047.4	5,360.3	7,445.5	10,572.6
Juice Drinks (up to 24% Juice)	18,316.2	20,749.8	22,808.3	24,964.5	27,443.4	30,498.4
- Asian Juice Drinks	12,276.3	13,381.1	14,518.5	15,680.0	17,091.2	18,800.3
- Frozen Juice Drinks	-	-	-	-	-	-
- Juice Drinks Excluding Asian	6,039.9	7,368.7	8,289.8	9,284.5	10,352.2	11,698.0
Fruit-Flavoured Drinks (No Juice Content)	-	-	-	-	-	-
Nectars (25-99% Juice)	3,769.6	4,203.1	5,148.8	6,564.7	7,680.7	9,831.3
- Frozen Nectars	-	-	-	-	-	-
- Unfrozen Nectars	3,769.6	4,203.1	5,148.8	6,564.7	7,680.7	9,831.3
Fruit/Vegetable Juice	23,565.8	27,092.9	31,004.4	36,889.6	42,569.6	50,902.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Off-trade Sales of Fruit/Vegetable Juice by Category: Value 2005-2010

VND billion

	2005	2006	2007	2008	2009	2010
100% Juice	39.1	57.8	83.5	158.7	224.5	321.1
- Frozen 100% Juice	-	-	-	-	-	-
- Not from Concentrate 100% Juice	-	-	-	-	-	-
- Reconstituted 100% Juice	39.1	57.8	83.5	158.7	224.5	321.1
Juice Drinks (up to 24% Juice)	357.1	423.4	485.5	538.9	599.1	671.2
- Asian Juice Drinks	242.4	281.1	323.3	355.6	393.0	436.2
- Frozen Juice Drinks	-	-	-	-	-	-
- Juice Drinks Excluding Asian	114.7	142.2	162.2	183.2	206.1	235.0
Fruit-Flavoured Drinks (No Juice Content)	-	-	-	-	-	-
Nectars (25-99% Juice)	69.0	77.9	96.6	124.7	148.4	192.1
- Frozen Nectars	-	-	-	-	-	-
- Unfrozen Nectars	69.0	77.9	96.6	124.7	148.4	192.1

Fruit/Vegetable Juice	465.2	559.1	665.6	822.2	972.0	1,184.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Off-trade Sales of Fruit/Vegetable Juice by Category: % Volume Growth 2005-2010

% volume growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
100% Juice	42.0	48.2	614.4
- Frozen 100% Juice	-	-	-
- Not from Concentrate 100% Juice	-	-	-
- Reconstituted 100% Juice	42.0	48.2	614.4
Juice Drinks (up to 24% Juice)	11.1	10.7	66.5
- Asian Juice Drinks	10.0	8.9	53.1
- Frozen Juice Drinks	-	-	-
- Juice Drinks Excluding Asian	13.0	14.1	93.7
Fruit-Flavoured Drinks (No Juice Content)	-	-	-
Nectars (25-99% Juice)	28.0	21.1	160.8
- Frozen Nectars	-	-	-
- Unfrozen Nectars	28.0	21.1	160.8
Fruit/Vegetable Juice	19.6	16.7	116.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Off-trade Sales of Fruit/Vegetable Juice by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 TOTAL
100% Juice	43.0	52.4	721.2
- Frozen 100% Juice	-	-	-
- Not from Concentrate 100% Juice	-	-	-
- Reconstituted 100% Juice	43.0	52.4	721.2
Juice Drinks (up to 24% Juice)	12.0	13.5	88.0
- Asian Juice Drinks	11.0	12.5	80.0
- Frozen Juice Drinks	-	-	-
- Juice Drinks Excluding Asian	14.0	15.4	104.9
Fruit-Flavoured Drinks (No Juice Content)	-	-	-
Nectars (25-99% Juice)	29.5	22.7	178.6
- Frozen Nectars	-	-	-
- Unfrozen Nectars	29.5	22.7	178.6
Fruit/Vegetable Juice	21.9	20.6	154.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Leading Flavours for 100% Juice: % Volume Breakdown 2005-2010

% retail volume

	2005	2006	2007	2008	2009	2010
Apple	5.5	5.0	4.5	4.0	4.0	4.5
Grapefruit	4.0	4.5	5.5	6.0	6.0	6.0
Orange	70.0	72.0	72.0	72.5	72.8	73.0
Peach	2.0	1.0	1.0	1.0	1.0	1.0
Pineapple	16.0	15.0	15.0	15.0	14.5	14.0
Other flavours	2.5	2.5	2.0	1.5	1.7	1.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Leading Flavours for Nectars (25-99% Juice): % Volume Breakdown 2005-2010

% retail volume

	2005	2006	2007	2008	2009	2010
Mango	8.0	8.0	8.0	8.5	8.5	8.0
Orange	28.0	29.0	29.0	29.2	29.5	29.5
Peach	13.5	14.0	15.0	14.5	14.0	13.5
Soursop	9.0	9.0	9.0	9.0	9.0	8.5
Tomato	10.5	9.5	8.7	8.5	8.5	9.0
Other flavours	31.0	30.5	30.3	30.3	30.5	31.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Leading Flavours for Juice Drinks (up to 24% Juice): % Volume Breakdown 2005-2010

% retail volume

	2005	2006	2007	2008	2009	2010
Apple	5.0	4.7	4.5	4.5	4.5	5.0
Coconut	12.0	10.8	10.0	10.0	9.8	9.8
Lychee	4.0	5.6	4.0	3.5	3.5	3.3
Mango	12.0	11.2	10.5	10.5	10.2	10.2
Orange	32.0	34.9	37.5	38.0	38.0	38.2
Peach	5.0	4.1	3.0	2.5	2.8	2.5
Pineapple	14.0	15.5	19.0	20.0	20.0	20.0
Soursop	12.0	9.5	9.5	9.0	9.0	8.8
Other flavours	4.0	3.7	2.0	2.0	2.2	2.2
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 % Share of Smoothies in 100% Juice and Nectars (25-99% Juice): Off-trade Value 2010

% value analysis

	Smoothies	Others	Total
100% Juice	0.0	100.0	100.0
Nectars (25-99% Juice)	0.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Chilled Vs Ambient Reconstituted 100% Juice: % Analysis 2005-2010

% retail volume

	2005	2006	2007	2008	2009	2010
Chilled Juices	-	-	-	-	0.0	0.0
Ambient Juices	100.0	100.0	100.0	100.0	100.0	100.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Company Shares of Fruit/Vegetable Juice by Off-trade Volume 2006-2010

% off-trade volume

Company	2006	2007	2008	2009	2010
Vietnam Dairy Products JSC (Vinamilk)	9.4	10.9	14.4	15.3	20.0
Interfood Shareholding Co	21.1	20.4	20.4	20.0	19.0
Dona New Tower JV Co	23.5	22.4	21.0	20.3	18.8
PepsiCo Vietnam (PIVN)	4.8	5.3	6.3	7.2	8.3
CKL Vietnam Corp	11.4	10.3	6.7	5.6	5.0
Malee Sampran PLC	1.9	2.5	3.0	3.6	3.9
Coca-Cola Beverages Vietnam Co Ltd	3.5	2.5	2.8	3.1	3.3
National Foods Pty Ltd	1.4	1.6	2.3	2.7	3.2
Tipco Foods (Thailand) PCL	0.6	0.6	0.6	0.5	0.5
Pioneer Food Group Ltd	-	-	0.2	0.3	0.3
National Grape Co-operative Association Inc	0.9	0.7	0.5	0.3	0.3
Litex Corp	1.2	1.1	1.0	0.9	-
Uni-President Vietnam Ltd	0.6	0.8	0.7	0.7	-
Florina A Honeos SA	0.3	0.3	0.2	0.2	-
Menken Drinks BV	0.3	0.2	0.2	0.1	-
Berri Ltd	-	-	-	-	-
International Food Processing Joint Venture Co	-	-	-	-	-
Others	19.1	20.5	19.8	19.3	17.5
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 Brand Shares of Fruit/Vegetable Juice by Off-trade Volume 2007-2010

% off-trade volume

Brand	Company	2007	2008	2009	2010
Vinamilk	Vietnam Dairy Products JSC (Vinamilk)	10.3	13.8	14.6	19.3
Wonderfarm	Interfood Shareholding Co	16.8	16.9	16.5	15.7
Nature	Dona New Tower JV Co	15.6	13.4	12.8	11.9
Twister	PepsiCo Vietnam (PIVN)	5.3	6.3	7.2	8.3
Sagiko	CKL Vietnam Corp	10.3	6.7	5.6	5.0
Minute Maid	Coca-Cola Beverages Vietnam Co Ltd	2.5	2.8	3.1	3.3
Berri	National Foods Pty Ltd	1.6	2.3	2.7	3.2
Chabaa	Malee Sampran PLC	0.7	1.2	2.0	2.3
Malee	Malee Sampran PLC	1.8	1.8	1.6	1.6
Tipco	Tipco Foods (Thailand) PCL	0.6	0.6	0.5	0.5
Ceres	Pioneer Food Group Ltd	-	0.2	0.3	0.3
Welch's	National Grape Co-operative Association Inc	0.7	0.5	0.3	0.3
Queen's	Litex Corp	1.1	1.0	0.9	-
Unif	Uni-President Vietnam Ltd	0.8	0.7	0.7	-
Florina	Florina A Honeos SA	0.3	0.2	0.2	-
Jaffa	Menken Drinks BV	0.2	0.2	0.1	-
Berri	Berri Ltd	-	-	-	-
Wonderfarm	International Food Processing Joint Venture Co	-	-	-	-
Others		31.5	31.6	30.9	28.5
Total		100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Company Shares of Fruit/Vegetable Juice by Off-trade Value 2006-2010

% off-trade value rsp

Company	2006	2007	2008	2009	2010
Vietnam Dairy Products JSC (Vinamilk)	9.5	10.9	15.9	17.4	22.0
Interfood Shareholding Co	21.1	20.3	19.9	19.4	18.2
Dona New Tower JV Co	21.9	20.6	18.7	17.7	16.4
PepsiCo Vietnam (PIVN)	4.0	4.2	4.8	5.4	6.2
Malee Sampran PLC	2.7	3.6	4.4	5.2	5.7
CKL Vietnam Corp	11.0	10.4	6.7	5.5	4.8
National Foods Pty Ltd	2.1	2.2	3.0	3.6	4.2
Coca-Cola Beverages Vietnam Co Ltd	3.3	2.1	2.3	2.5	2.6
Pioneer Food Group Ltd	-	-	0.2	0.4	0.4
Tipco Foods (Thailand) PCL	0.5	0.5	0.5	0.4	0.4
National Grape Co-operative Association Inc	0.7	0.5	0.4	0.3	0.2
Uni-President Vietnam Ltd	0.6	0.8	0.8	0.7	-
Litex Corp	1.0	0.9	0.8	0.7	-
Florina A Honeos SA	0.6	0.4	0.3	0.3	-
Menken Drinks BV	0.5	0.4	0.3	0.2	-
Berri Ltd	-	-	-	-	-
International Food Processing Joint Venture Co	-	-	-	-	-
Others	20.6	22.2	21.1	20.2	19.0
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Brand Shares of Fruit/Vegetable Juice by Off-trade Value 2007-2010

% off-trade value rsp

Brand	Company	2007	2008	2009	2010
Vinamilk	Vietnam Dairy Products JSC (Vinamilk)	10.4	15.4	16.8	21.3
Wonderfarm	Interfood Shareholding Co	17.1	16.9	16.4	15.3
Nature	Dona New Tower JV Co	14.9	12.4	11.7	10.8
Twister	PepsiCo Vietnam (PIVN)	4.2	4.8	5.4	6.2
Sagiko	CKL Vietnam Corp	10.4	6.7	5.5	4.8
Berri	National Foods Pty Ltd	2.2	3.0	3.6	4.2
Chabaa	Malee Sampran PLC	1.0	1.7	2.8	3.4
Minute Maid	Coca-Cola Beverages Vietnam Co Ltd	2.1	2.3	2.5	2.6
Malee	Malee Sampran PLC	2.6	2.7	2.4	2.3
Ceres	Pioneer Food Group Ltd	-	0.2	0.4	0.4
Tipco	Tipco Foods (Thailand) PCL	0.5	0.5	0.4	0.4
Welch's	National Grape Co-operative Association Inc	0.5	0.4	0.3	0.2
Unif	Uni-President Vietnam Ltd	0.8	0.8	0.7	-
Queen's	Litex Corp	0.9	0.8	0.7	-
Florina	Florina A Honeos SA	0.4	0.3	0.3	-
Jaffa	Menken Drinks BV	0.4	0.3	0.2	-
Berri	Berri Ltd	-	-	-	-
Wonderfarm	International Food	-	-	-	-

	Processing Joint Venture Co				
Others		31.6	31.0	29.9	28.1
Total		100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Off-trade Sales of Fruit/Vegetable Juice by Category: Volume 2010-2015

'000 litres

	2010	2011	2012	2013	2014	2015
100% Juice	10,572.6	14,801.6	19,982.1	25,976.8	32,471.0	38,965.2
Juice Drinks (up to 24% Juice)	30,498.4	33,972.2	37,944.9	42,350.8	47,235.7	52,656.4
Fruit-Flavoured Drinks (No Juice Content)	-	-	-	-	-	-
Nectars (25-99% Juice)	9,831.3	10,814.5	11,787.8	12,730.8	13,621.9	14,439.3
Fruit/Vegetable Juice	50,902.2	59,588.3	69,714.8	81,058.4	93,328.6	106,060.9

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 15 Forecast Off-trade Sales of Fruit/Vegetable Juice by Category: Value 2010-2015

VND billion

	2010	2011	2012	2013	2014	2015
100% Juice	321.1	433.5	563.5	704.4	859.4	1,022.7
Juice Drinks (up to 24% Juice)	671.2	711.0	765.4	834.2	914.9	1,009.4
Fruit-Flavoured Drinks (No Juice Content)	-	-	-	-	-	-
Nectars (25-99% Juice)	192.1	197.9	205.8	215.1	225.8	238.3
Fruit/Vegetable Juice	1,184.4	1,342.4	1,534.7	1,753.7	2,000.1	2,270.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Off-trade Sales of Fruit/Vegetable Juice by Category: % Volume Growth 2010-2015

% volume growth

	2014/15	2010-15 CAGR	2010/15 TOTAL
100% Juice	20.0	29.8	268.6
Juice Drinks (up to 24% Juice)	11.5	11.5	72.7
Fruit-Flavoured Drinks (No Juice Content)	-	-	-
Nectars (25-99% Juice)	6.0	8.0	46.9
Fruit/Vegetable Juice	13.6	15.8	108.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Off-trade Sales of Fruit/Vegetable Juice by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
100% Juice	26.1	218.5

Juice Drinks (up to 24% Juice)	8.5	50.4
Fruit-Flavoured Drinks (No Juice Content)	-	-
Nectars (25-99% Juice)	4.4	24.0
Fruit/Vegetable Juice	13.9	91.7

Source: *Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources*