The market for

Fruit and Vegetable Juices and Fruit Purée

In the United Kingdom

2001

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ITC

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List of abbreviations

ACP	African, Caribbean and Pacific States
GSP	Generalized System of Preferences
EU	European Union
HS	Harmonized Commodity Description and Coding System
Kg	Kilogrammes
LDDCs	Least Developed Developing Countries
Mln	Millons
MNS	Market News Service
N.e.s.	Not elsewhere specified
NFC	Not From Concentrate
SACU	South African Customs Union
UK	United Kingdom

1. Product description

This market brief focuses on fruit and vegetable juices and fruit puree in the United Kingdom (UK). In terms of the Harmonized System, the products covered in the brief are classified under the following headings:

HS 0811 Fruit and nuts, uncooked or cooked by steaming or boiling in water, frozen, whether or not containing added sugar or other sweetening matter.

HS 2008 Fruit, nuts and other edible parts of plants, otherwise prepared or preserved, whether or not containing added sugar or other sweetening matter or spirit, not elsewhere specified or included.

HS 2009 Fruit juices (including grape must) and vegetables juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter.

It should be noted that the products covered by the brief fall mainly under the heading HS 2009. The statistical tables provided on imports include only data falling under heading HS 2009 (i.e. Tables 1, 2 and Appendix 1). Fruit pulp, as referred to in this brief to the extent that they are used as a raw material for fruit juice, is classified under HS 0811 (for frozen products) and HS 2008 (aseptic products).

In terms of imports into Europe, juice products are usually shipped as juice concentrate, pulp or puree, the cost to ship juices normally being prohibitive unless the product can be marketed at a premium. Juice concentrates are commonly produced in the country of origin where water is extracted from the fruit, reducing transport and storage costs. After the concentrate arrives in the country of destination, the juice is restored to its original state by the addition of water. Fruit pulp, which is the residue remaining after squeezing or crushing a fruit, and puree, which is mashed fruit, are used as basic ingredients for fruit juices and nectars which are normally produced in the countries importing the materials.

In terms of definition, fruit juices in the UK are defined by the European Union's *Council Directive 93/77/EEC of 21 September 1993 relating to fruit juices and certain similar products* (Official Journal L244, 30.9.1993, p. 23). The consolidated text of the EU Directive and subsequent amendments are available on the European Commission's Eur-lex Web site[1].

The European Commission has begun the procedure to make refinements to the 1993 Directive and in mid-1999 the European Parlament approved a proposal, subject to amendments, relating to the labelling of juices that have been sweetened with the addition of sugars. The proposal is yet to be issued as a legally binding Directive.

In terms of drinks made from fruit juice, one can identify three categories: pure juices, nectars and juice drinks. Pure fruit juice must contain 100% fruit and is made either by dilution of concentrate back to its original strength or by squeezing juice from fresh fruit immediately prior to packing. The juice must be at the same strength and consistency as freshly squeezed juice and must be made without preservatives.

Nectars are manufactured using a base of concentrated juice or a pasteurized puree of fruit pulp to which sugar and water are added. For citrus fruits, the fruit content of nectars is usually over 50% but it can be as low as 25% for other fruits.

[1] Directive 93/77/EEC available on the European Commission's Eur-Lex web site at http://europa.eu.int/eur-lex/en/consleg/pdf/1993/en_1993L0077_do_001.pdf

Juice drinks may have a fruit content ranging from 6% juice up to 99%. They can be made with the addition of sugar, water and in some instances with fruit puree, extra flavoring, color and vitamins.

In analyzing the UK market, both the pure juice and juice drink sectors are taken to include long life and chilled juices. Long life juice is pasteurized and packed to give it a shelf life of up to 12 months. Chilled juice is either partly pasteurized or not pasteurized and has a shelf life of 4 to 21 days.

Vegetable juices make up a very small proportion of the UK market and where reference is made in this document to fruit juices, this should be taken to include vegetable juices.

2. Statistical Data

Production

The majority of fruit (and vegetables) grown in the UK is consumed as fresh produce. The main fruits produced domestically for use in juice production are apples and blackcurrants.

Trade

The UK exports small quantities of fruit juice. In 1999, exports amounted to US$60 million or 54,000 tons by volume. The main domestically produced fruit contributing to juice exports are apples. The other items exported are mainly products that have been repackaged or blended in the UK from imported concentrates.

With low levels of exports, the UK relies on imports for most of its juice requirements. In 1999, imports were valued at US$435 million in 1999, or 360,000 tons by volume a 10% drop from 1998 import volumes (see Table 1).

A high proportion of UK juice imports comes through intermediary European countries particularly the Netherlands and Germany, which have well established international trading channels in the sector. Due to these trading links, direct imports into the UK from developing countries and emerging markets have tended to be relatively small

Orange juice, frozen and chilled, continues to dominate the market, and has accounted for between 60% and 66% of juice imports in volume terms over the last five years. Apple juice accounts for 14% of imports while imports of pineapple juice, the main single flavor tropical juice import, have been in the region of 3% over the past 5 years.

Table 1: UK Imports of Fruit and Vegetable Juices (HS 2009)
(V – Value, US$'000s; Q – Quantity, Metric Tons)

	1995			1996			1997			1998	
	V	Q	% Share	V	Q	% Share	V	Q	% Share	V	Q
Orange juice, frozen (HS 2009 11)	170 241	110 890	35.2	190 866	125 785	36.0	125 036	115 152	34.4	158 103	125 679
Orange juice not frozen (HS 2009 19)	60 698	79 766	25.3	76 308	95 220	27.3	58 601	89 743	26.8	96 415	138 548
Grapefruit juice (HS 2009 20)	15 328	11 014	3.5	14 322	11 595	3.3	11 886	9 841	2.9	12 063	12 087
Other Citrus fruit juice (HS 2009 30)	13 498	8 998	2.9	17 071	11 514	3.3	17 304	9 936	3.0	16 135	9 739
Pineapple juice (HS 2009 40)	11 447	10 446	3.3	13 247	9 476	2.7	15 411	10 505	3.1	14 502	10 071
Tomato juice (HS 2009 50)	1 693	2 469	0.8	2 378	3 189	0.9	1 952	3 095	0.9	1 920	3 087
Grape juice (incl must) (HS 2009 60)	13 998	15 233	4.8	15 842	15 300	4.4	17 112	15 704	4.7	15 332	13 919
Apple juice (HS 2009 70)	73 449	50 313	16.0	76 636	44 511	12.8	63 037	47 222	14.1	65 336	56 979
Other fruit & veg juice nes (HS 2009 80)	34 819	14 832	4.7	38 944	17 038	4.9	35 232	14 035	4.2	37 348	14 151
Mixtures of juices (HS 2009 90)	18 857	11 308	3.6	23 601	15 417	4.4	25 439	19 126	5.7	23 821	17 741
Total (HS 2009)	414 026	315 269	100.0	469 216	349 044	100.0	371 009	334 359	100.0	440 976	402 002

Source: *Comtrade Database, United Nations Statistical Division (UNSD), New York*

Origin of Imports

The main suppliers to the UK fruit juice market are listed by juice type and volume share in Table 2 (below). A detailed listing of the suppliers and the values and volumes they supply are presented in Appendix 1 (total juice imports ranked by supplier) and Appendix 2 (main suppliers by type of juices).

Table 2: Major Suppliers to the UK by type of fruit juice (HS2009), 1999

Product	HS Code	Supplying Country	% of total UK imports
Frozen orange juice	2009 11	Netherlands	54.3
		Brazil	23.3
		Belgium	13.0
		Germany	5.5
		Cuba	2.0
Fresh orange juice	2009 19	Germany	45.0
		France	35.0
		Ireland	7.8
		Spain	5.6
Grapefruit juice	2009 20	France	24.3
		Netherlands	21.4
		Germany	18.4
		Belize	12.3
		Israel	9.4
Other Citrus juices	2009 30	Italy	42.2
		Belgium	12.0
		Spain	10.0
		Mexico	7.6
		Peru	6.3
Pineapple juice	2009 40	Kenya	29.6
		Netherlands	18.0
		Indonesia	10.4
		Costa Rica	10.4
		Ireland	5.9
		Philippines	5.8
Tomato juice	2009 50	Greece	52.6
		Spain	21.0
		Italy	9.7
		Netherlands	6.4
		USA	5.4
Grape juice	2009 60	Spain	51.4
		France	24.5
		Argentina	9.4
		Denmark	3.9
		Cyprus	3.5
Apple juice	2009 70	Germany	56.4
		Austria	17.1
		France	6.2
		Portugal	5.6
		Italy	4.3
Other juice n.e.s	2009 80	USA	21.7
		Germany	16.6
		Ireland	10.2
		Netherlands	9.4
		Austria	7.5
Mixtures of juices	2009 90	Germany	53.4
		Netherlands	17.4
		France	13.0
		Italy	4.5
		SACU	4.3

Brazil is the leading supplier of frozen orange juice to Europe and its direct share of the UK import market is 23%. Its overall share of the UK market may be estimated as being in the region of 45% on the basis that it supplies over 75% of each of the Dutch and Belgian markets which in turn account for 67% of UK imports. In terms of fresh and chilled orange juice, intra-EU trade dominates UK imports, with Germany and France being the main suppliers.

For grapefruit juice, France, Germany and the Netherlands have been replacing Belize, Israel and the USA as the major suppliers to this 12,000 ton market.

The bulk of the 'other citrus juices' market comprises non-specified single citrus juices. Italy, the main supplier, holds 42% of the market. Among developing countries, Mexico, Peru and Argentina are the main suppliers of such juices.

The UK market for pineapple juice has flattened out over the last five years, trading at about 10,000 tons. Although Thailand is the worlds' leading supplier of pineapple juice concentrate, its share of the market for supplying the UK directly is low, primarily because most of its trade with Europe is conducted through the Netherlands. In this regard, it exported 21,000 metric tons to the Netherlands in 1999 compared with 305 metric tons to the UK.

The UK import market for tomato juice remains small, trading at about 3,500 tons. Greece and Spain are the main suppliers.

The grape juice market decreased in 1998 and 1999 to 13,700 tons from a steady 15,000 tons in the preceding 3 years. In recent years, the market has been dominated by France (51% in volume terms) and Italy (24%) with Spain having a 9% volume share.

Apple juice is the largest import market segment after fresh and chilled orange juice. Imports originate mainly from other European countries, Germany supplying 56% of imports while Austria is the other major supplier with 17% in volume terms.

For other juices, "not-mixed", US suppliers have been steadily gaining an increased market share over the past 5 years, and were the leading supplier in 1999 with almost 22% of the market. The other major suppliers are Germany, Ireland and the Netherlands. Small quantities of single flavor (not-mixed) tropical juices are imported directly from the original supplier countries. However, the bulk of single flavor tropical juices imported into the UK pass through intermediary EU countries, particularly the Netherlands.

For mixed juices, imports amounted to 16,000 tons in 1999, with Germany, the Netherlands and France as the main suppliers to the UK market.

3. Retail Market Characteristics

The retail market for fruit juice and juice drinks in the UK was estimated to be worth US$2,600 million in 1999. In terms of volume, consumption amounted to 1,700 million litres, an increase of 10% on the previous year and a 35% increase since 1995. (See Table 3).

Sale of fruit juices (100% fruit content) in 1999 accounted for US$1,700 million in value and 940 million litres in volume terms. Consumption of juice drinks amounted to US$880 million in value and 770 million litres by volume.

It is estimated that up to 70% of imports are accounted for by the retail trade while the catering and hotel trade account for 20%. The remaining 10% are absorbed by the food-manufacturing sector such as manufacturers of baby food, yogurt, ice-cream desserts, jam, confectionery, and essences.

Pure Juices

Within the pure juice sector, orange remains the dominant flavor, accounting for up to 77% of the market. Apple juice accounts for about 10% of sales with grapefruit and pineapple having a 3% share.

Medium priced ambient (long-life) juices continue to hold the largest market share in pure juices although they show little or no growth compared to the premium, high value end where chilled not-from-concentrate (NFC) juices are the main driver of growth. In 1999, ambient pure juice accounted for 480 million litres compared to chilled pure juice of 150 million litres. Orange juice remains the dominant product within the ambient market, claiming about 70% of sales.

About 80% of the ambient market is own label and competition among the major supermarket chains is intense. The major chains offer discounted products in multipack and one-litre packs and even lower pricing on their plain packaging economy products (which retail as low as US$0.63 per litre).

With the supermarkets exerting such downward pressure on prices, this segment of the market has developed something of a commodity image. Established brands of major manufacturers have to position themselves on the basis of quality to maintain or gain market share or focus their expansion and innovative efforts on the chilled sector where margins are far higher.

Compared to the ambient pure juice market, chilled not-from-concentrate (NFC) fruit juice, sold at a premium, is outperforming the rest of the fruit juice sector. The chilled NFC sector is estimated to be worth about US$ 200 million and has largely developed since 1991 when the Tropicana range entered from the USA. The growth in the chilled juices sector is likely to continue as consumers look for improved taste and products claiming to offer health benefits.

Juice Drinks

Growth in the fruit juice and juice drinks market has been driven largely by juice drinks. The growth in juice drinks has been led by Procter and Gamble's Sunny Delight range of orange juice drinks, a product launched in 1998 and containing 6% juice.

Other innovative products contributing to growth in the juice drinks sector include a number of cranberry based products, the popularity of which is due to cranberry's perceived health benefits. It is used increasingly in combinations with other fruits for juice drinks, for dilutable cordials and is popular among affluent young adults as a cocktail mixer.

In terms of functional products (i.e. those perceived to have health-related benefits), the market has been slow to develop compared to other major European markets. However, there is an increase in the number of juice products emerging on the market with added vitamins, calcium, reduced sugar content or added fibre.

'Smoothies,' juice drinks marketed as having a thick, real fruit texture, are beginning to make an impact in the UK, having previously been successful in the USA. There are two types of 'smoothies.' One type is based on fresh fruit purées, including orange mango and banana purées, and containing combinations of up to 60% fruit juice and fruit purees. The other type has a dairy base with a lower juice content and is similar to yogurt drinks. Although introduced originally to the UK in 1994, it was only in 1999 that 'smoothies' began to gain wider popularity. 'Smoothies' are being targeted at the young adult population seeking 'healthy' drinks. New retail outlets, 'smoothies bars,' have appeared in city centers offering the drinks and catering particularly to the lunch time market.

Nectars

Compared to other major markets in the EU, the consumption of fruit nectars in the UK is relatively low and has remained so over the past decade, the market being valued at about US$60 million per year by Mintel, a UK market research company. The lack of growth in nectars can be attributed to a lack of consumer awareness, a lack of a traditional market and an absence of well-resourced producers to launch high profile advertising. There are no major players in the UK in nectars as such, Epicure and Rubicon being the most widely distributed brands. For the small market that exists, nectars are mainly aimed at adults, particularly as an alternative to alcohol on social occasions.

Vegetable Juices and Juice Drinks

Tomato juice and tomato based products are the main vegetable juices and juice drinks on the market, the only other significant single flavor products being carrot based. As with fruit juices, vegetable juices are also seeking to tap into consumers' increasing concern with healthier lifestyles. Products in this area include tomato-based juices with added mixtures of vegetables that contribute to daily vitamin intake.

New Products

With ambient pure juices increasingly perceived as a commodity product, and with prices being driven down by the major retailers, the major brands are looking at new ways to differentiate their products and to build consumer loyalty. Attempts to differentiate product include the use of fruit aromas developed through natural technologies that provide a distinctive taste for the product.

Another area of growth is in the functional (or health-related) market. Consumer demand for healthier food and drinks products is increasing in parallel to the growth of the population over-35 years of age that are particularly health conscious. Cranberry, considered to have a number of healthy characteristics, is the flavor enjoying most growth at present, benefiting from the consumer demand for healthier drinks. There has also been an increase in the number of vitamin-enriched products appearing on the market. Some manufacturers are, however, moving cautiously in the area of added vitamins and other elements as they believe overuse of 'added' products may detract from pure juices' perceived 'natural purity.'

Organic juice products, particularly chilled, are another segment that is likely to see growth as a result of the increased health concerns of consumers. Whether any growth will extend significantly to organic ambient products remains to be seen, as some manufacturers believe that consumers link organic with 'freshness' rather than with long-life products.

Competition

In terms of manufacturers of juice products, the major players are predominantly part of multinational food and drink companies. They include:

- Britvic Soft Drinks
- Cadbury Schweppes
- Coca-Cola & Schweppes Beverages
- Dairy Crest International
- Del Monte Foods International
- Gerber Foods Soft Drinks
- Merrydown Plc
- Nestle Grocery Division
- Prince's Soft Drinks
- Procter And Gamble
- Rubicon
- Smithkline Beecham
- St Ivel Foods Europe
- Tropicana UK

Most companies focus on either pure juice or juice drinks although Gerber and Del Monte deal in both.

In terms of juices, and aside from retailers own-label, Del Monte is the leading brand with an estimated 10% volume and 14% value share of the market. Its share has been increased with its acquisition in early 1999 of the Just Juice brand from the Tomkins Group. Del Monte uses its own brand to market 100% Brazilian orange juice aimed at adults and families while Just Juice is aimed at a younger customer profile.

Princes is a strong player within the ambient independent retail market, with a share of 26%. It also is a supplier of own-label products for most of the multiples.

The market for juice drinks remains highly fragmented with no single producer enjoying a market share greater than 10%. The rapid gain in market share that Procter & Gamble's 'Sunny Delight' brand achieved demonstrates that the juice drinks market can be quite volatile with new entrants able to make rapid impacts, particularly if they have sufficient marketing resources.

Table 3: Retail sales of fruit juices and juice drinks by value and volume, 19
(V – Value, US$ millions; Q – Quantity, Million Litres

	1995		1996		1997		1998	
	US$m h	Litres m h	US$m h	Litres m h	US$m h	Litres m h	US$m h	Litre
Fruit juices	1 472	845	1 520	855	1 624	900	1 672	9
Juice Drinks	552	420	560	420	576	430	864	6
Total	2 024	1 265	2 080	1 275	2 200	1 330	2 536	1 5

Source: **Corporate Intelligence, London**

4. Market Access

Tariffs

The UK, as a member state of the EU, applies the EU's common external custom tariff applicable to imports from third countries. It is, therefore, a preference giving country under the EU's Generalised System of Preferences (GSP), which offers reduced or zero duty rates on imports into the EU. In addition to the EU's GSP Scheme, other preferential trading arrangements may exist for the EU's partners to benefit from reduced and zero duty rates. In particular, developing countries may benefit from the EU's trading agreements with countries of the African-Caribbean-Pacific region (ACP) or those that are classed as Least Developed Developing Countries (LDDCs).

The EU customs tariff for fruit and vegetable juices is extensive and, in some instances, difficult to interpret. In the TARIC (Integrated Tariff of the European Communities), the edition of the Official Journal of the European Communities which contains details of the EU tariff, the main chapter relating to fruit and vegetable juices (i.e. HS 2009) runs to 23 pages. In addition, one also has to take account of entries for juices and related products in other chapters, notably HS 2008 and HS 0811.

To address the complexity of the EU's custom tariff, the ITC's Market News Service (MNS) has compiled a *Guide to the EC Custom Tariff Relating to Fruit Juices*, which is updated on a regular basis. Appendix 3 includes a copy of this guide for the period 1 July 2000 to 30 June 2001.

Regulations

As noted in the *Product Description* section, UK regulation on the definition and content of fruit juices and juice drinks incorporates the EU's Council Directive 93/77/EEC of 21 September 1993 relating to fruit juices and certain similar products (OJ L 244, 30.9.1993, p. 23)[2]. The EU Directive has been incorporated fully into national legislation in 1995 through *The Fruit Juices and Fruit Nectars (England, Wales, and Scotland) (Amendment) Regulations 1995, Statutory Instrument Number 236*[3] and *The Fruit Juices and Fruit Nectars (Amendment) Regulations (Northern Ireland) 1995, Statutory Instrument Number 377*.

In terms of labelling of fruit juice products for consumer use, UK regulations incorporate the EU legislation in this area. These are largely based on the *Directive on the approximation of the laws of the Member States relating to the labelling, presentation and advertising of foodstuffs (79/112/EEC in OJ No L33, 8.2.1979, p. 1)* and its subsequent amendments. The consolidated text of the regulation and its subsequent amendments are available on the European Commission's Eurolex Web site[4]. In terms of the UK national legislation, the most recent changes are incorporated in *The Food Labelling (Amendment) Regulations 1999, Statutory Instrument (SI) No 747, 1999* (available via the Web site of the UK Government's official publications office, the HMSO[5]).

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[2] Directive 93/77/EEC available on the European Commission's Eur-Lex Web site at http://europa.eu.int/eur-lex/en/consleg/pdf/1993/en_1993L0077_do_001.pdf
[3] Statutory Instrument No 236 on fruit juice definition available on the HMSO web site at http://www.legislation.hmso.gov.uk/si/si1995/Uksi_19950236_en_1.htm
[4] Directive 79/112/EEC available on the European Commission's Eur-Lex web site at http://europa.eu.int/eur-lex/en/consleg/pdf/1979/en_1979L0112_index.html
[5] Statutory Instrument No 747 on food labelling available on the HMSO web site at http://www.legislation.hmso.gov.uk/si/si1999/19990747.htm

5. Prices

In terms of imported fruit juice products, the UK can be considered to be a 'price taker,' with prices obtaining on the UK market largely dependent on movements in world price and outside the control of the UK market. World prices for juices are liable to fluctuate due to a variety of factors, including seasonality, crop damage due to weather or pests, and speculation on commodity exchanges.

There are a number of sources that provide coverage of juice prices, including trade journals such as *The Public Ledger* and *Foodnews*. Another source for tracking tropical and citrus juice prices is offered by the ITC's Market News Service (MNS).

The Market News Services publishes monthly reports on bulk packed fruit juices in the European and USA markets. The juices covered include orange, grapefruit, pineapple, guava, lemon, banana, papaya, pineapples, passion fruit, mango, guanabanae, and acerola. For further information please refer to the *MNS Fruit Juices Report (Europe)* for August 2000[6], which gives details of prices prevailing on the European market for the range of juices mentioned above.

6. Distribution Channels

The UK market depends heavily on imported fruit juices with domestic production accounting for only a small proportion of needs. Most imported products are shipped in bulk as concentrate, pulp or pure and reconstituted on arrival in the UK. High transport costs normally make it prohibitive to import juices directly. There are a small number of products imported in retail packs, either pitched as premium priced products or aimed at different ethnic markets in the UK.

A limited number of well-established agents and importers handle the UK's imports of juices. The larger of these may have operations in the main European juice trading countries such as the Netherlands, Germany and Belgium. Major importers and agents include Fuerst Day Lawson, Kiril Mischeff, Gerald McDonald & Co, Uren H.J & Sons, and Wilson and Mansfield. (See the section 'Contacts & Sources' for contact details of a selection of importers). These agents and importers, working with major fruit juice exporters, take orders from UK packers and processors and arrange for the import and delivery of the required juice products.

A number of the major packers and distributors, such as Del Monte and Prince's, purchase directly from suppliers, particularly in the case of orange juice supplies. This enables them to make use of forward contracts to stabilize their price commitments and supplies.

In terms of retailing, supermarkets are the main distribution channel for fruit juices and drinks, accounting for between 75% and 80% of sales.

7. Commercial Practices

Importers are likely to expect to be offered Free on Truck (FOT) or Cost, Insurance and Freight (CIF) terms payable after 30 days. As the trade in fruit and vegetable juices is well established and on a relatively large scale, new entrants to the market are likely to have difficulty in persuading buyers to move away from established payment practices.

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[6] To order this report, please contact the Market News Service by emailing: MNS@intracen.org or faxing: +41-22-730 0572 / 730 09 06

8. Packaging and Labelling

Packaging

Orange juice concentrate, the main import product, is usually shipped by tanker from Brazil, the UK's leading supplier or by road tanker from tank farms in the Netherlands and Belgium.

Other forms of packaging used for juice products include intermediate bulk containers (IBCs) from 1,000 kg to 1,400 kg, aseptic drums of 250 kg and other plastic drums ranging from 25 to 100 kg and 250 kg steel drums. The most common use of drums is for the transport of orange, pineapple, grapefruit and passion fruit concentrate. Smaller quantities of juice product may be shipped in 10 - 20 kg cartons or sacks of 20 - 30 kg.

Pulp and purees from tropical fruit are frequently hot-packed in metal cans of 3 - 5 kg, in drums up to 200 litres or deep-frozen in cartons of 20 - 25 kg.

In terms of retail packaging, the dominant forms are the aseptic 1 litre carton and single serve cartons. Use of plastic (PET) bottles and cans is not extensive. With an increasing focus on health matters and concerns over drinking and driving, affluent consumers are seeking out non-alcoholic products in presentable packaging that can be used when entertaining guests. In this regard, a number of smaller juice producers at the premium end of the market are making use of wine-style bottles to position their products as competitors to alcoholic beverages.

Labelling

Importers and agents are usually in a position to provide details of the exact labelling requirements for bulk imports. Such labelling will require the specification of content, quantity, the Brix level (i.e. sugar content), the origin and final destination.

As mentioned in the section on *Market Access*, the UK regulations on the labelling of fruit juice products for consumer use incorporate the EU legislation in this area.

9. Sales Promotion

Advertising expenditure on fruit juices in the consumer and trade press increased dramatically from around US$13 million in each of 1996 and 1997 to US$29 million in 1998. This increase was due mainly to Procter & Gamble's support for their newly launched 'Sunny Delight Brand,' which has resulted in increased activity among its competitors

Trade fairs serve as an important promotional tool for targeting importers and producers. Relevant international trade fairs include UK exhibitions such as the biennial Food & Drink Expo and the IFE (International Food and Drink Trade Exhibition), while Anuga, in Germany and SIAL in France are other important events in the fruit juice calendar. (See the 'Contacts & Sources' section for details of these exhibitions).

10. Market Prospects

With UK consumers increasingly concerned with healthier lifestyles and adopting new social attitudes, for example towards drinking and driving, the juice and juice drink sector is expected to grow over the next five years. The opportunity for growth is also seen in the fact that UK consumption, at 28 litres per capita, is estimated to be 40-50% of per capita consumption in markets such as Germany and the USA. The Corporate Intelligence Group, in its April 2000 report on fruit juices and juice drinks, estimated that consumption will rise by 22% between 1999 and 2004, reaching 2,000 million litres with sales of US$3.2 billion, an increase in value of 21% in current 1999 prices.

Within the pure juices sector, the ambient middle market (and orange juice in particular) will continue to hold the largest market share. However, this segment of the market is unlikely to show much growth compared to the premium, high value end of the market where chilled NFC is expected to experience continued growth.

The trend towards healthier lifestyles suggests there are good prospects for growth in the functional drinks area, particularly if one compares the relatively low level of consumption of such products with Germany, where supplemented juices and juice drinks, such as vitamin enriched drinks, are the third largest category after apple and orange juice.

As has been the case in the last number of years, growth across the sector is expected to be driven largely by juice drinks with the growth in new products (e.g. smoothies) leading to increased sales. The stronger growth in juice drinks compared to juices will also be driven by the fact that juice drinks allow for greater product differentiation compared to the 100% pure juice products.

In terms of flavors, orange will remain the most popular across juices and juice drinks with other single flavor drinks not making much impact aside from blackcurrant (particularly in the childrens' market) and cranberry.

In terms of fresh and chilled orange juice, Brazil and Israel would appear to be the strongest position among developing countries to experience growth in the UK over the short-term. The potential does exist for other developing county exporters of fresh orange, such as South Africa, Morocco and Tunisia, to move into the market provided they develop further their fruit juice processing industries.

Pineapple continues to be the main single flavor tropical juice preferred by consumers although other flavors such as mango and guava have shown some increase in popularity. Aside from pineapple maintaining and possibly increasing sales, there is unlikely to be dramatic growth for single flavor tropical juices, the main market continuing to be ethnically defined consumer groups. With most tropical juices being used in mixed juice products, and with growth expected in the mixed juice segment, this is likely to be one area that contributes to increased UK demand for tropical juices, pulps and purees.

With well-established trading channels, a high proportion of juice will continue to be imported to the UK through intermediary European countries particularly the Netherlands. Direct imports into the UK from developing countries and emerging markets are therefore likely to remain relatively small. To address the British market, exporters will need look beyond the UK itself and address buyers in the Netherlands and to a lesser extent other intermediary countries such as Germany and Belgium.

11. Contacts & Sources

Importers

UK Importers of Fruit Juices & Fruit Juice Products

Aspall Cyder
The Cyder House
Aspall Hall
Stowmarket
Suffolk IP14 6PD
Tel + 44 1728 860510
Fax: + 44 1728 861 031
Import organic apple juice and concentrate, wine vinegar
From: Austria, Belgium, Spain
Turnover from imports: £0.5-1m
Employees: 35

Beck & Scott
Unit 1 Ravenhill Business Park
Ravenhill Rd
Belfast BT6 8AW
Tel + 2890 734444
Fax: + 44 2890 734440
From: Argentina, Australia, Canada, Denmark, France, Greece, Ireland, Israel, Italy, Cote d'Ivoire, Malaysia, Mauritius, Peru, Seychelles, Singapore, South Africa, Spain, Sri Lanka, Thailand, Turkey
Employees: 35

Birds Eye Walls Ltd.
Station Avenue
Walton on Thames
Surrey KT12 1NT
Tel + 44 1932 263 000
Fax: + 44 1932 263 127
Import fruit juice, dairy produce, frozen foods
From: Worldwide

Cobell Ltd.
Yealm Manor
Cowick Lane
Exeter
Devon EX2 9JG
Tel + 44 1392 430 280
Fax: + 44 1392 430 060
www.cobell.co.uk
Import fruit juices, fruit juice concentrates
From: Worldwide

Del Monte Foods Ltd.
Del Monte House
London Road
Staines
Middlesex TW18 4JD
Tel + 44 1784 447 400
Fax: + 44 1784 465 301
From: Worldwide

The Duckworth Group
416 Chester Road
Old Trafford
Manchester M16 9HJ
Tel + 44 161 872 0255
Fax: + 44 161 848 7331
Import Fruit juices and pulps
From: Mainly from European Union
Employees: 150

Fuerst Day Lawson Ltd.
St Clare House
30-33 Minories
London EC3N 1LN
Tel + 44 20 7488 0777
Fax: + 44 20 7488 9927
Import concentrated fruit juices and citrus oils, seeds, nuts
From: Worldwide
Turnover from imports £20m+
Employees: 75

Gerber Foods Manufacturing Ltd.
78 Webdon Road
Bridgwater
Somerset TA6 7QR
Tel + 44 1278 458 151
Fax: + 44 1278 428 191
Import fruit juice pulps
From Worldwide
Employees: 1300

Elizabeth James & Sons Ltd.
Phoenix Bank Business Park
Newport Road
Market Drayton
Shropshire TF9 2AA
Tel + 44 1630 654 229
Fax: + 44 1630 655 786
Import fruit juice concentrates, fruit juice portions, fruit drinks
From World-wide
Turnover from imports £1-10m
Employees: 30

Kent Foods
Trident House
Renford Road
Paisley, Scotland, PA3 4EF
Tel + 44 141 887 7000
Fax: + 44 141 887 5777
Import fruit juice, vegetable oils, dairy products
From: World-wide
Turnover from imports: £1-5m
Employees: 5

Gerald MacDonald & Co Ltd.
1 St Andrews Hill
London EC4V 5HA
Tel + 44 20 7236 3695
Fax: + 44 20 7248 7267
Import juice concentrates, aroma chemicals and flavorings
From: Italy, Greece, Turkey, Israel, Morocco, Zambia, Zimbabwe, Cyprus, India
Turnover from imports: £10-20m
No of employees: 18

Meridian Foods Ltd.
Industrial Estate
Corwen
Clywd, Wales LL21 9RT
Tel + 44 1490 413 151
Fax: + 44 1490 412 032
Import fruit spreads, fruit juice concentrates, health foods
Export fruit juice
From: Mainly Netherlands
Turnover from imports: £1-5m
Employees 120

Kiril Mischeff Ltd.
Broadwall House
21 Broadwall
London SE1 9PL
Tel + 44 20 7928 8966
Fax: + 44 20 7261 9085
Import canned, frozen fruit, fruit juices
From: Asia, Europe, N/S America
Turnover from imports: £ 20m+
Employees: 40

Multiple Marketing Ltd.
95 Camberwell Station Road
London SE5 9JJ
Tel + 44 20 7274 6090
Fax: + 44 20 7737 1827
Import dairy produce, fruit juice
From: Mainly Netherlands
Turnover from imports: £1-5m
No of employees 25

Bryan W Nash & Sons Ltd.
15 Rose Hill
Dorking
Surrey RH4 2ED
Tel + 44 1306 889 905
Fax: + 44 1306 740 676
Import fruit juice concentrates, wheat starch/gluten

The Newton Group
Cherrycourt Way
Leighton Buzzard
Bedfordshire LU7 8UH
Tel + 44 1525 379 033
Fax: + 44 1525 379 695
Import Fruits and fruit juices
From: EU, world-wide
No of employees: 9

Princes Soft Drinks
Swaledale House
West Yorkshire Industrial Estate
Toftshaw Lane
Bradford
Yorkshire BD4 6SX
Tel + 44 1274 651 777
Fax: + 44 1274 651 088
Import fruit concentrates
From: World-wide

Uren H.J and Sons Ltd.
Wood Park
Chester High Road
Neston
South Wirral
Merseyside L64 7TB
Tel + 44 151 353 0330
Fax: + 44 151 353 0251
http://www.uren.com
Import fruit juice concentrates, aseptic fruits, frozen fruits
From: World-wide
Employees: 60

Wilson & Mansfield Ltd.
Haddon House
Hindhead Road
Haslemere
Surrey GU27 1LH
Tel + 44 1428 651 331
Fax: + 44 1428 641 552
Import fruit juices, canned fruit
From: World-wide

Trade Periodicals

Consumer Goods UK
Corporate Intelligence on Retailing
48 Bedford Sq., London WC1B 3DP
United Kingdom
Tel + 44 20 78143814
Fax: + 44 20 7696-9004
http://www.cior.com
Frequency: Monthly

Foodnews
Foodnews Co Ltd.
80 Calverley Road
Tunbridge Wells TN1 2UN
United Kingdom
Tel + 44 1892 533 813
Fax: + 44 1892 511 803
http://www.agra-food-news.com
Frequency: Weekly

Fruit and Vegetable Markets
Agra Europe (London) Ltd.
80 Calverley Road
Tunbridge Wells TN1 2UN
United Kingdom
Tel + 44 1892 533 813
Fax: + 44 1892 511 803
http://www.agra-food-news.com
Frequency: Monthly

Grocer (The)
William Reed Publishing
Broadfield Park
Brighton Road
Pease Pottage
Crawley RH11 9HT
United Kingdom
Tel + 44 1293 613400
Fax: + 44 1293 6130330
www.foodanddrink.co.uk
Frequency: weekly

Mintel Marketing Intelligence
Mintel International Group Ltd.
18-19 Long Lane, London EC1A 9HE
United Kingdom
Tel + 44 20 7606 4533
Fax: + 44 20 7606 5932
http://www.mintel.com
Frequency: monthly

Market Research Great Britain
Euromonitor
60-61 Britton Street
London EC1M 5NA
United Kingdom
Tel + 44 171 2511105
Fax: + 44 171 6083149
http://www.euromonitor.com
Frequency: monthly

Public Ledger
LLP Ltd.
69-77 Paul St
London EC2A 4LQ
United Kingdom
http://www.public-ledger.com/

Supermarketing
Quadrant House
The Quadrant
Sutton SM2 5AS
United Kingdom
Tel + 44 20 8652 8275
Fax: + 44 20 8652 8907
Frequency: weekly

Trade Associations

British Fruit Juice Importers Association
Unit 5, Goose's Foot Estate
Kingston
Hereford HR2 9HY
United Kingdom
(Advocacy role on behalf of members in relations with UK Government and European Commission on issues such as regulation and standards. Membership lsit is strictly restricted to internal use).

British Importers Association
Suite 8, Castle House
Castlereagh Street
London W1H 5YR
United Kingdom
Tel + 44 20 7258 3999
Fax: + 44 20 724 5055

British Soft Drinks Association
20 Stukeley Street
London WC2 5LR
United Kingdom
Tel + 44 20 7430 0356
Fax: + 44 20 7783 1604

Trade Fairs

Anuga
Location: Cologne, Germany
Venue: Köln Messe
Frequency: Biennial (next event October 2001)
Organizer: Köln Messe Messe- und Ausstellungs-Ges.m.b.H. Köln
Address: Messeplatz 1, D-50679 Köln, Germany
Tel +49 221 821 0; +49 0 221/821-3619
Fax: +49 221 821 2574
http://www.koelnmesse.de

Food & Drink Expo
Location: Birmingham, United Kingdom
Venue: National Exhibition Centre
Frequency: Biennial
Organizer: Miller Freeman (Exhibitions)
Address: 630 Chiswick High Road, London W4 5BG, United Kingdom
Tel +44 20 8742 2828
Fax: +44 (0)20 8747 3856

IFE - International Food and Drink Trade Exhibition
Location: London, United Kingdom

Venue: ExCel London
Frequency: Biennial (next event March 2001)
Organizer: Fresh RM
Address: 11 Manchester Square, London W1M 5AB, United Kingdom
Tel +44 20 7886 3100
Fax: +44 20 7886 3091

SIAL - Salon Internatoinal de l'Alimentation
Location: Paris, France
Venue: aris Nord Villepinte Exhibition Centre
Frequency: Annual
Organizer: Salon International de l'Alimentation
Address: 1 rue Du Parc, F-92593, Levallois Perret Cedex,
France
Tel +33 1 49 68 54 99
Fax: +33 1 47 31 37 82
Email sial@sial.fr
Website: http://www.sial.fr

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Customs Tariff, 2000. Her Majesty's Customs and Excise, London.

Council Directive 93/77/EEC of 21 September 1993 relating to fruit juices and certain similar products in The Official Journal of the European Communities, L 244, 30.9.1993, p. 23. (Also available through Eur-Lex, the European Commission web site for official legislation, http://europa.eu.int/eur-lex/en/consleg/pdf/1993/en_1993L0077_do_001.pdf).

Council Directive 79/112/EEC of 8 February 1979 on the approximation of the laws of the Member States relating to the labelling, presentation and advertising of foodstuffs in The Official Journal of the European Communities, L33, 8.2.1979, p. 1). (Also available through Eur-Lex, the European Commission web site for official legislation,
http://europa.eu.int/eur-lex/en/consleg/pdf/1979/en_1979L0112_index.html)

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Fruit Juices in Market Research Great Britain, Jan 1999, February 1999, Euromonitor, London, United Kingdom.

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The Fruit Juices and Fruit Nectars (Amendment) Regulations (Northern Ireland) 1995, (Statutory Instrument Number 377). The Stationery Office Limited, London.

The Food Labelling (Amendment) Regulations 1999, (Statutory Instrument (SI) No 747, 1999). The Stationery Office Limited, London
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PC-TAS – Personal Computer Trade Analysis System, 1995-1999. International Trade Centre, Geneva,

World Trade Atlas Import Export Trade Information System – United Kingdom 2000/1, 2000, Global Trade Information Services Inc, Columbia, SC, USA,

Appendix 1: UK Imports of Fruit and Vegetable Juices by Major Supplying Countr

(V – Value, US $000s ; Q – Quantity, Metric Ton

	1995			1996			1997			1998	
	V	Q	% Share	V	Q	% Share	V	Q	% Share	V	Q
World	**414 026**	**315 269**	**100.0**	**469 216**	**349 044**	**100.0**	**371 009**	**334 359**	**100.0**	**440 976**	**402 002**
Of which **Netherlands**	132 362	80 618	25.6	147 711	89 003	25.5	91 896	74 192	22.2	87 940	62 165
Germany	52 297	41 813	13.3	61 310	65 023	18.6	44 746	65 725	19.7	56 742	93 310
France	19 373	15 337	4.9	38 398	32 952	9.4	37 084	32 174	9.6	66 309	63 030
Belgium - Lux	44 069	33 814	10.7	35 378	26 211	7.5	35 452	33 606	10.1	44 526	35 196
Brazil	9 691	7 338	2.3	24 128	18 141	5.2	13 334	14 862	4.4	39 208	30 008
USA	31 066	31 727	10.1	21 819	17 413	5.0	23 295	16 855	5.0	28 424	17 848
Belgium	*	*	*	*	*	*	*	*	*	*	*
Austria	10 671	5 606	1.8	11 629	4 973	1.4	17 799	11 140	3.3	18 332	12 099
Italy	27 598	18 652	5.9	35 383	19 984	5.7	20 366	12 098	3.6	25 614	18 184
Ireland	15 008	25 657	8.1	13 142	19 925	5.7	14 916	20 836	6.2	8 109	18 907
Spain	7 864	5 347	1.7	9 467	5 283	1.5	14 522	9 798	2.9	20 658	15 611
Israel	22 403	14 121	4.5	17 750	10 704	3.1	12 827	8 378	2.5	10 937	7 442
Denmark	8 937	3 383	1.1	10 281	5 265	1.5	7 597	4 298	1.3	6 427	3 140
Portugal	1 542	946	0.3	3 499	1 845	0.5	6 588	3 569	1.1	2 460	1 590
Kenya	2 687	3 211	1.0	2 508	2 178	0.6	3 100	2 261	0.7	2 840	2 113
Cuba	1 063	716	0.2	3 728	2 493	0.7	3 107	3 094	0.9	2 175	1 722
Belize	7 995	9 055	2.9	8 802	5 382	1.5	1 827	1 516	0.5	2 577	2 981
Indonesia	134	135	0.0	1 345	935	0.3	1 958	1 371	0.4	1 172	951
S.Afr CusUn	5 174	5 679	1.8	4 830	5 439	1.6	6 566	7 396	2.2	4 056	4 977
Argentina	1 135	1 023	0.3	1 719	1 277	0.4	1 429	1 237	0.4	695	597
Philippines	362	352	0.1	268	272	0.1	392	434	0.1	185	195
Costa Rica	2 145	1 424	0.5	896	724	0.2	979	923	0.3	1 127	1 251
Chile	29	22	0.0	516	399	0.1	720	447	0.1	293	84
Turkey	580	732	0.2	1 109	1 005	0.3	201	375	0.1	295	606
Mexico	804	584	0.2	589	441	0.1	537	422	0.1	836	693

Source: *Comtrade Database, United Nations Statistical Division (UNSD), New York*

Appendix 2: Main Suppliers of UK Imports of Fruit & Vegetable Juices by Type of Ju

(V – Value, US$'000s ;Q –Quantity, Metric T

	1995			1996			1997			1998	
Orange Juice, Frozen (HS 200911)	**V**	**Q**	**% Share**	**V**	**Q**	**% Share**	**V**	**Q**	**% Share**	**V**	**Q**
World	170 241	110 890	100,0	190 866	125 785	100,0	125 036	115 152	100,0	158 103	125 679
of which											
Netherlands	99 368	62 508	56,4	111 095	70 728	56,2	63 458	56 370	49,0	60 965	46 176
Belgium-Lux	31 568	17 326	15,6	24 958	16 153	12,8	26 829	25 211	21,9	39 679	32 344
Brazil	9 121	6 750	6,1	23 139	17 427	13,9	12 443	14 194	12,3	38 642	29 486
Belgium	*	*	*	*	*	*	*	*	*	*	*
Germany	4 581	2 683	2,4	6 001	3 490	2,8	4 054	3 085	2,7	2 464	2 740
Cuba	144	115	0,1	2 675	1 799	1,4	2 492	2 474	2,1	1 663	1 483
Venezuela	*	*	*	935	549	0,4	1 001	869	0,8	*	*
Israel	5 522	3 327	3,0	4 287	2 571	2,0	3 693	2 240	1,9	2 610	1 586
USA	5 693	4 600	4,1	6 776	5 949	4,7	7 077	6 627	5,8	4 175	4 923
Belize	5 666	7 551	6,8	5 641	3 286	2,6	305	265	0,2	1 614	2 001
Uruguay	41	36	0,0	*	*	*	*	*	*	530	496

HS 200919	1995			1996			1997			1998	
Orange Juice, Not Frozen	**V**	**Q**	**% Share**	**V**	**Q**	**% Share**	**V**	**Q**	**% Share**	**V**	**Q**
World	**60 698**	**79 766**	**100,0**	**76 308**	**95 220**	**100,0**	**58 601**	**89 743**	**100,0**	**96 415**	**138 548**
of which											
Germany	8 236	14 485	18,2	16 569	36 003	37,8	9 808	37 552	41,8	24 111	59 629
France	1 657	1 357	1,7	21 488	20 010	21,0	19 797	18 409	20,5	43 208	44 231
Ireland	10 668	20 066	25,2	8 702	14 478	15,2	7 860	13 624	15,2	5 136	13 097
Spain	1 610	1 271	1,6	2 972	1 976	2,1	2 052	1 624	1,8	6 983	6 115
Israel	10 133	6 362	8,0	8 058	4 361	4,6	5 340	3 332	3,7	5 743	3 608
Netherlands	4 096	3 076	3,9	8 646	5 196	5,5	5 455	3 997	4,5	3 490	3 100
Italy	987	673	0,8	1 334	737	0,8	1 065	562	0,6	672	434
USA	15 216	20 444	25,6	3 865	5 628	5,9	4 800	6 135	6,8	5 889	6 858
Belgium	*	*	*	*	*	*	*	*	*	*	*
Belgium-Lux	6 272	10 307	12,9	3 336	5 420	5,7	1 581	3 734	4,2	329	618
Denmark	159	226	0,3	418	593	0,6	185	119	0,1	334	324

Grapefruit Juice (HS200920)	1995			1996			1997			1998	
	V	Q	% Share	V	Q	% Share	V	Q	% Share	V	Q
World	15 328	11 014	100,0	14 322	11 595	100,0	11 886	9 841	100,0	12 063	12 087
of which France	99	57	0,5	1 213	1 444	12,5	1 249	1 321	13,4	4 072	4 093
Netherlands	2 837	1 568	14,2	1 604	1 318	11,4	1 723	1 378	14,0	1 068	1 077
Germany	180	210	1,9	361	652	5,6	1 233	674	6,8	659	943
Belize	1 904	1 122	10,2	3 111	2 018	17,4	1 469	1 206	12,3	963	979
Israel	5 420	3 284	29,8	4 040	2 535	21,9	2 360	1 703	17,3	1 575	1 431
USA	2 172	2 331	21,2	1 888	1 700	14,7	1 889	1 664	16,9	2 795	2 707
Ireland	521	548	5,0	316	352	3,0	319	269	2,7	159	334
Cuba	919	601	5,5	1 052	693	6,0	615	620	6,3	513	239
Australia	76	50	0,5	*	*	*	*	*	*	*	*
Dominican Rp	93	56	0,5	22	19	0,2	63	56	0,6	*	*
Indonesia	*	*	*	*	*	*	52	39	0,4	*	*

	1995			1996			1997			1998	
Other Citrus Juice (HS200930)	V	Q	% Share	V	Q	% Share	V	Q	% Share	V	Q
World	13 498	8 998	100,0	17 071	11 514	100,0	17 304	9 936	100,0	16 135	9 739
of which Italy	4 498	3 908	43,4	8 868	6 063	52,7	7 429	4 281	43,1	6 216	4 340
Belgium	2 055	1 243	13,8	1 424	693	6,0	2 406	1 073	10,8	2 678	1 200
Belgium-Lux	*	*	*	*	*	*	*	*	*	*	*
Spain	473	385	4,3	1 272	689	6,0	1 667	949	9,6	1 308	627
Mexico	804	584	6,5	589	441	3,8	537	422	4,2	815	674
Peru	881	637	7,1	1 047	741	6,4	838	592	6,0	639	445
Argentina	234	194	2,2	795	470	4,1	320	199	2,0	263	238
Germany	478	162	1,8	87	17	0,2	126	25	0,2	865	362
Netherlands	1 759	854	9,5	1 363	625	5,4	1 833	1 381	13,9	1 986	953
Ireland	1 300	263	2,9	161	5	0,0	1 082	373	3,7	413	122
Brazil	100	55	0,6	353	181	1,6	465	252	2,5	274	216

Pineapple Juice (HS200940)	1995			1996			1997			1998	
	V	Q	% Share	V	Q	% Share	V	Q	% Share	V	Q
World	11 447	10 446	100,0	13 247	9 476	100,0	15 411	10 505	100,0	14 502	10 07
of which Kenya	2 687	3 211	30,7	2 486	2 174	22,9	3 034	2 193	20,9	2 840	2 11
Netherlands	4 493	2 912	27,9	5 454	2 791	29,5	4 515	2 468	23,5	5 835	3 06
Indonesia	134	135	1,3	1 279	929	9,8	1 906	1 332	12,7	1 166	9 47
Costa Rica	805	616	5,9	728	639	6,7	939	890	8,5	927	1 179
Ireland	491	796	7,6	555	650	6,9	989	638	6,1	576	46
Philippines	357	347	3,3	224	225	2,4	390	433	4,1	67	10
Spain	*	*	*	25	23	0,2	*	*	*	627	52
Israel	421	305	2,9	512	261	2,8	724	360	3,4	529	28
Thailand	443	482	4,6	651	512	5,4	811	572	5,4	688	46
S.Afr Cus Un	639	660	6,3	455	411	4,3	792	585	5,6	358	31

Tomato Juice (HS200950)	1995			1996			1997			1998	
	V	Q	% Share	V	Q	% Share	V	Q	% Share	V	Q
World	1 693	2 469	100,0	2 378	3 189	100,0	1 952	3 095	100,0	1 920	3 087
of which Greece	147	360	14,6	471	1 174	36,8	335	998	32,2	396	1 134
Spain	9	16	0,6	1	0	0,0	194	311	10,0	300	486
Italy	308	656	26,6	677	462	14,5	340	377	12,2	174	198
Netherlands	453	366	14,8	393	359	11,3	354	345	11,2	423	503
USA	165	163	6,6	109	98	3,1	146	143	4,6	164	155
Israel	395	533	21,6	474	758	23,8	381	539	17,4	290	405
Belgium	175	360	14,6	165	323	10,1	163	350	11,3	49	108
Canada	30	8	0,3	17	4	0,1	8	1	0,0	29	20
Kenya	*	*	*	*	*	*	12	16	0,5	*	*
Germany	7	1	0,0	6	2	0,1	3	2	0,1	75	66

Grape Juice not fermented (HS200960)	1995			1996			1997			1998	
	V	Q	% Share	V	Q	% Share	V	Q	% Share	V	Q
World	13998	15 233	100,0	15 842	15 300	100,0	17 112	15 704	100,0	15 332	13 919
of which France	3 213	5 808	38,1	3 335	5 371	35,1	3 466	5 769	36,7	2 744	4 848
Italy	2 145	1 957	12,8	2 184	1 572	10,3	3 332	2 170	13,8	2 886	2 045
Spain	1 197	598	3,9	2 188	1 029	6,7	5 289	3 489	22,2	6 554	4 540
Argentina	812	768	5,0	819	725	4,7	1 101	1 025	6,5	375	323
Cyprus	3 266	3 520	23,1	4 512	4 538	29,7	1 820	1 595	10,2	788	801
Germany	1 310	934	6,1	1 307	838	5,5	523	410	2,6	410	333
Denmark	445	199	1,3	380	164	1,1	392	184	1,2	554	348
USA	184	131	0,9	183	97	0,6	248	137	0,9	288	153
Chile	*	*	*	311	311	2,0	258	261	1,7	*	*
Portugal	161	24	0,2	*	*	*	*	*	*	*	*

Apple Juice (HS200970)	1995			1996			1997			1998	
	V	Q	% Share	V	Q	% Share	V	Q	% Share	V	Q
World	73 449	50 313	100,0	76 636	44 511	100,0	63 037	47 222	100,0	65 336	56 979
of which Germany	26 832	18 247	36,3	26 875	17 050	38,3	20 169	17 877	37,9	20 204	22 531
Austria	6 663	4 341	8,6	7 722	3 926	8,8	14 304	10 103	21,4	15 235	11 412
France	8 620	5 203	10,3	7 784	4 052	9,1	7 499	4 294	9,1	6 658	4 505
Portugal	1 289	780	1,5	3 465	1 806	4,1	6 299	3 410	7,2	2 460	1 590
Italy	15 363	8 998	17,9	16 649	8 747	19,7	5 195	3 174	6,7	12 808	9 180
Spain	3 120	2 118	4,2	2 212	1 115	2,5	3 109	2 074	4,4	3 622	2 446
Netherlands	5 078	3 070	6,1	5 408	2 691	6,0	2 067	1 905	4,0	1 888	1 554
Ireland	1 294	2 473	4,9	1 209	1 780	4,0	641	960	2,0	396	1 945
Denmark	2 074	1 216	2,4	1 620	765	1,7	1 914	1 713	3,6	1 269	933
SACU	293	319	0,6	56	64	0,1	1	2	0,0	102	254

Other Juice, Not Mixed (HS200980)	1995			1996			1997			1998	
	V	Q	% Share	V	Q	% Share	V	Q	% Share	V	Q
World	34 819	14 832	100,0	38 944	17 038	100,0	35 232	14 035	100,0	37 348	14 151
of which USA	4 693	1 361	9,2	6 270	1 738	10,2	7 375	1 486	10,6	14 040	2 526
Germany	6 665	2 477	16,7	5 879	3 006	17,6	4 952	1 642	11,7	4 125	1 775
Ireland	410	688	4,6	974	1 596	9,4	1 543	2 625	18,7	581	1 858
Netherlands	5 265	1 439	9,7	5 459	1 595	9,4	4 062	1 364	9,7	4 212	1 854
Austria	3 932	1 229	8,3	3 897	1 046	6,1	2 864	713	5,1	2 958	607
Italy	3 826	2 160	14,6	5 067	2 118	12,4	2 354	1 092	7,8	2 284	1 299
Denmark	3 468	708	4,8	5 013	1 850	10,9	3 545	1 393	9,9	2 692	778
Chile	*	*	*	204	88	0,5	462	186	1,3	293	84
Belgium	*	*	*	*	*	*	*	*	*	*	*
Belgium-Lux	978	361	2,4	1 925	650	3,8	1 264	391	2,8	1 005	305
France	1 415	328	2,2	1 149	324	1,9	1 274	511	3,6	2 527	1 286

Mixtures of Juices (HS200990)	1995			1996			1997			1998	
	V	Q	% Share	V	Q	% Share	V	Q	% Share	V	Q
World	18 857	11 308	100,0	23 601	15 417	100,0	25 439	19 126	100,0	23 821	17 741
of which Germany	3 809	2 493	22,0	4 112	3 891	25,2	3 459	4 230	22,1	3 407	4 719
Netherlands	9 012	4 825	42,7	8 260	3 690	23,9	8 377	4 948	25,9	8 044	3 870
France	220	168	1,5	2 907	1 463	9,5	3 317	1 594	8,3	6 563	3 795
Italy	167	30	0,3	163	53	0,3	451	300	1,6	210	249
SACU	189	263	2,3	2 060	2 433	15,8	4 717	5 607	29,3	2 768	3 761
Denmark	2 686	992	8,8	2 459	1 388	9,0	1 559	888	4,6	1 279	493
USA	1 879	1 732	15,3	1 559	1 358	8,8	1 030	298	1,6	761	279
Belgium-Lux	*	*	*	*	*	*	*	*	*	*	*
Belgium	133	147	1,3	1 232	581	3,8	965	493	2,6	255	127
Austria	8	2	0,0	*	*	*	632	324	1,7	*	*
Finland	*	*	*	*	*	*	113	27	0,1	*	*

Source: *Comtrade Database, United Nations Statistical Division (UNSD), New York*

Appendix 3: European Union Customs Tariff for Fruit Juices as from 1

TARIC (Integrated tariff of the European Communities) as from 1 Ju

Product	Taric code	Rate of duty	GSP (generalized system of preference			
			SPGA	SPGE	SPGL	Exceptions
Acerola purée 6-8 brix, frozen	0811.90.95.75	14.4%	0%	0%	5%	CL,MX,TH : 1
Acerola juice concentrate 20-30 brix	2009.80.79.90	16.8%	0%	0%	16.8%	
Avocado purée, frozen	0811.90.95.75	14.4%	0%	0%	5%	CL,MX,TH : 1
Banana purée and banana purée concentrate, 20-24 brix, aseptic	2008.99.49.19	17.6%	0%	0%	6.1%	AR,BR,TH : 1
Carambola (starfruit) purée, 5-7 brix, frozen	0811.90.85.10	9%	0%	0%	3.1%	CL,MX,TH : 9
Cashew purée, 13-14 brix, frozen	0811.90.85.10	9%	0%	0%	3.1%	CL,MX,TH : 9
Coconut milk, 8-10 brix	2009.80.79.90	16.8%	0%	0%	16.8%	
Grapefruit juice and grapefruit juice concentrate	2009.20.99.00	12%	0%	0%	10.2%	AR,BR,TH : 1

TARIC (Integrated tariff of the European Communities) as from 1 Ju

Product	Taric code	Rate of duty	GSP (generalized system of preference			
			SPGA	SPGE	SPGL	Exceptions
Guanabana (soursop, corossol) purée, frozen	0811.90.95.75	14.4%	0%	0%	5%	CL,MX,TH :1
Guaraná extract	1302.19.99.00	0%	0%	0%	0%	
Guava purée concentrate frozen and aseptic	2008.99.46.00	11%	0%	0%	9.3%	AR,BR,TH : 1
Guava purée, 8-10 brix frozen	0811.90.85.10	9%	0%	0%	3.1%	CL,MX,TH : 9
Lemon juice concentrate	2009.30.31.10	14.4%	0%	0%	12.2%	AR,BR,TH : 1
Lime juice, concentrate	2009.30.31.90	14.4%	0%	0%	12.2%	AR,BR,TH : 1
Mango purée, aseptic. Mango purée concentrate, aseptic or frozen.	2008.99.47.00	11%	0%	0%	3.8%	AR,BR,TH : 1
Mango purée, frozen	0811.90.85.10	9%	0%	0%	3.1%	CL,TH : 9% MX: 7.2%
Orange juice concentrate, less than 67 brix, frozen	2009.11.99.99	15.2%	0%	0%	12.9%	AR,BR,TH : 1

TARIC (Integrated tariff of the European Communities) as from 1 Ju

Product	Taric code	Rate of duty	GSP (generalized system of preference			
			SPGA	SPGE	SPGL	Exceptions
Orange juice concentrate, less than an 67 brix, aseptic	2009.19.99.90	12.2%	0%	0%	8.5%	AR,BR,TH : 1
Passion fruit juice, concentrate, 50 brix	2009.80.73.00	10.5%	0%	0%	8.9%	AR,BR,TH : 1
Papaya purée, frozen	0811.90.85.10	9%	0%	0%	3.1%	CL,MX,TH : 9
Papaya purée, concentrate frozen and aseptic	2008.99.47.00	11%	0%	0%	3.8%	AR,BR,TH : 1
Pineapple juice, concentrate less than an 67 brix	2009.40.30.00	15.2%	0%	0%	12.9%	AR,BR,TH : 1
Pineapple purée, aseptic	2008.20.91.00	18.4%	0%	0%	15.6%	AR,BR,TH : 1
Pineapple purée, frozen	0811.90.95.90	14.4%	0%	0%	5%	CL,TH : 14.4 MX: 9.3%
Pomegranate juice, 65 brix, concentrate	2009.80.79.90	16.8%	0%	0%	16.8%	
Tuna (cactus pear) juice, 50 brix, concentrate	2009.80.79.90	16.8%	0%	0%	16.8%	
Umbu purée, 10 brix, frozen	0811.90.95.75	14.4%	0%	0%	5%	CL,MX,TH : 1

Sources::

1) Klaus Böcker GmbH, Bahnhofstrasse 26, Buxtehude 21614, Germany. Tel + 49-4161-55550, Fax: + 49-4161-3536
2) The Official Journal of the European Communities, Integrated Tariff of the European Communities (Taric), C115 & C11