



Europe & World Trends in 100% Juice and Juice Drinks Consumption

Citrus Short Course, September, 17 , 2003



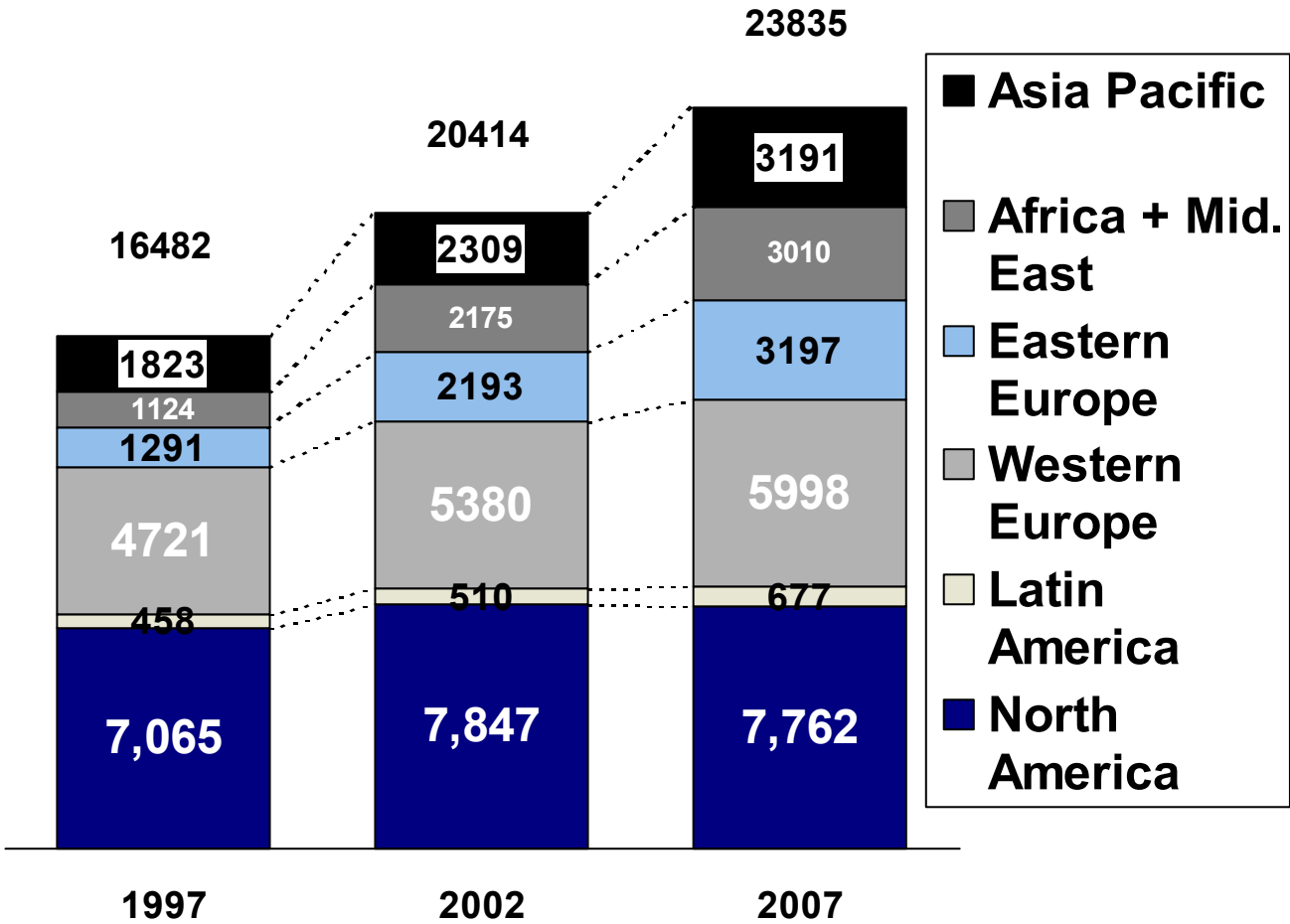
This Presentation focuses on.....

- ✓ Worldwide demand 100% Juice
 - Current Consumption Volumes
 - Historic Volumes and Growth
 - Current Flavour profiles by Market
 - Brand vs Private label (P/L) per Market
 - Focus on NFC
- ✓ Juice Drinks
 - Consumption Volumes
 - Historic Volumes and Growth
 - Brand vs Private Label (P/L) per Market

World-Wide Consumption and Growth 100% Juice

100% Juice Sales by Region

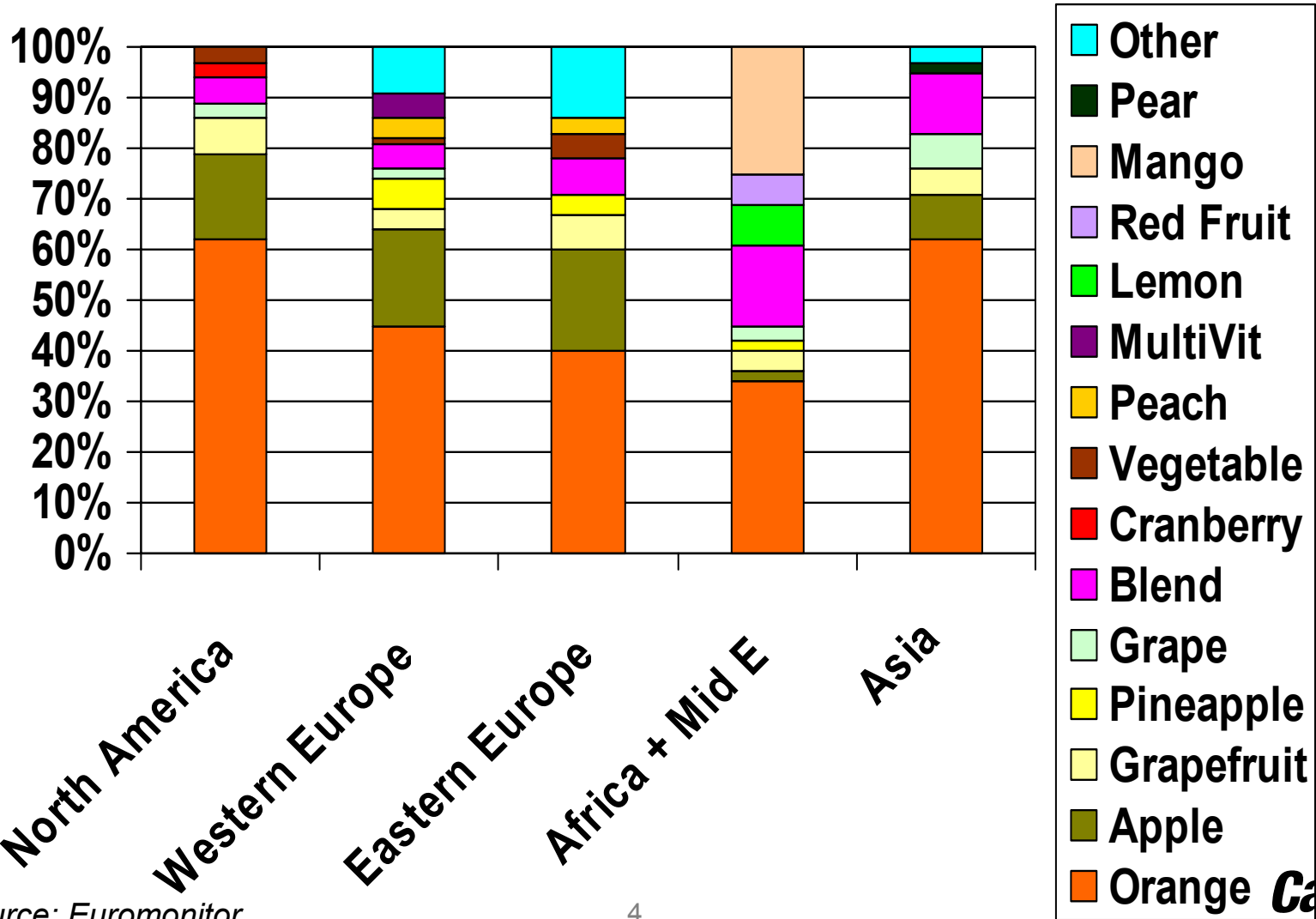
Volume (Millions of Litres) – Commercially Packaged



Source: Euromonitor



100% Juice Consumption by Flavour per Market

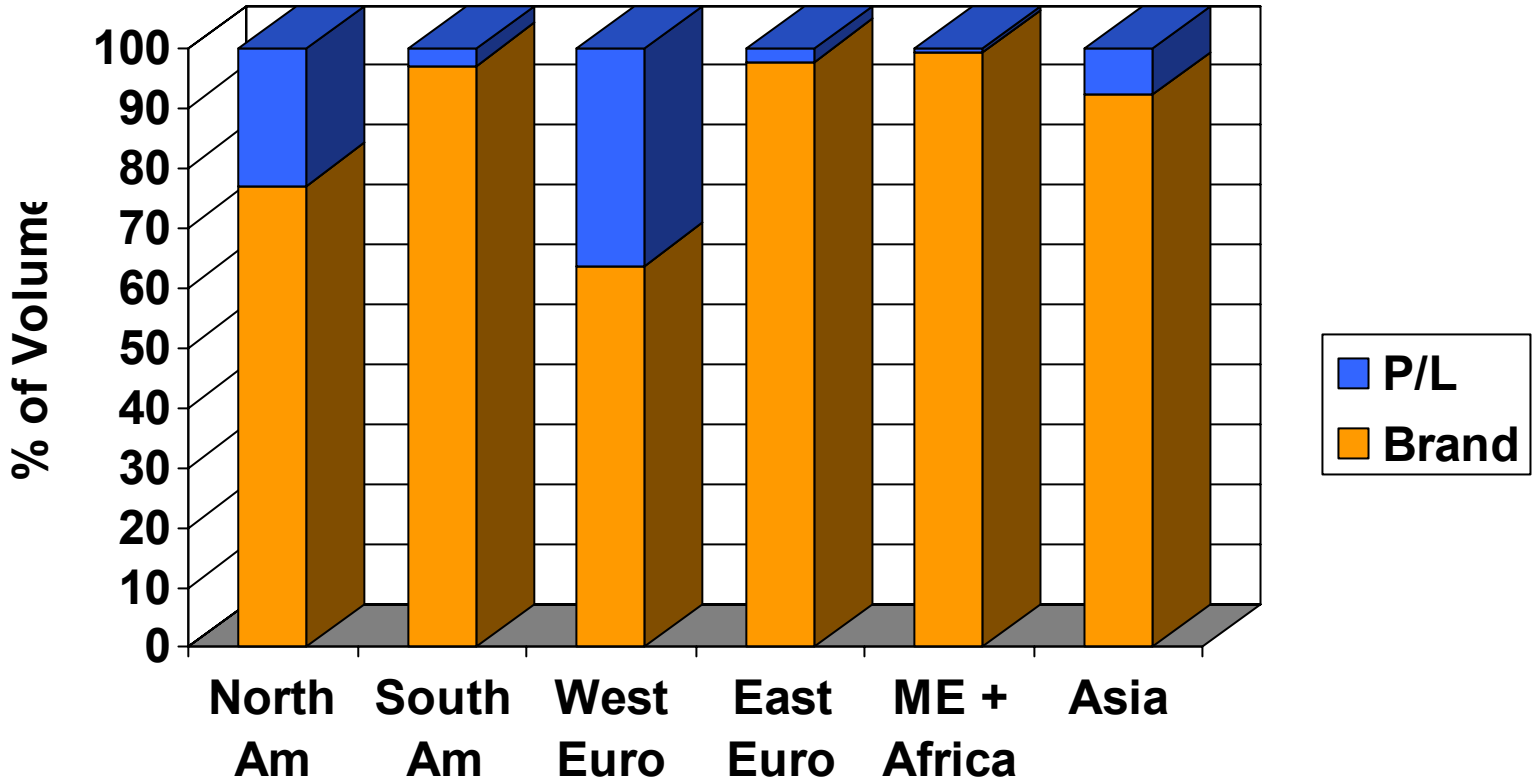


Source: Euromonitor

Main Highlights of World 100% Juice Consumption by Flavour

- ✓ Orange dominates in all geographies
- ✓ Blends strong in developing markets
- ✓ Some Continents have a unique flavour
- ✓ Growth Anticipated in all flavour sectors as World Wide Demand increases

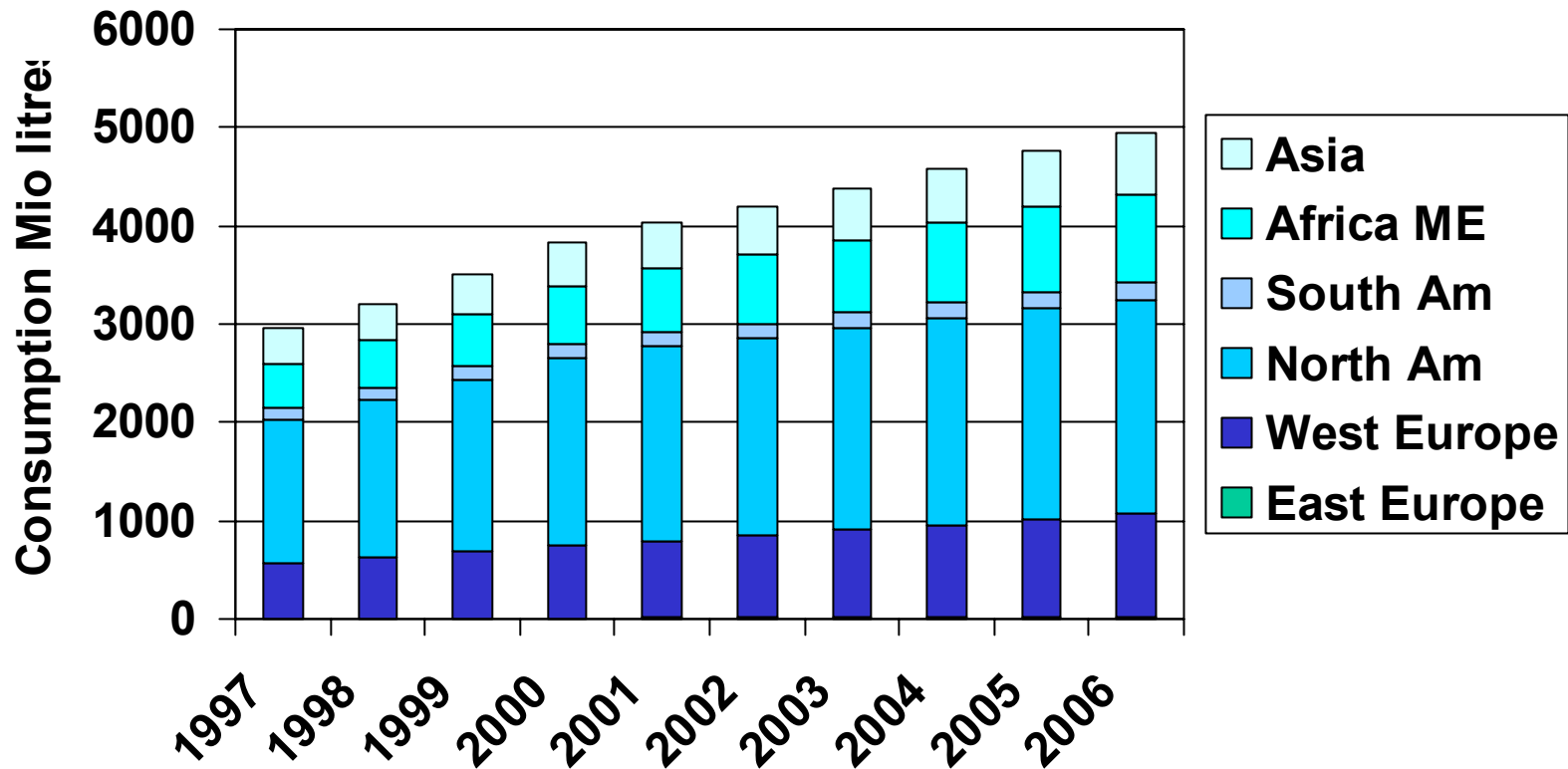
Brand vs Private Label 100% Juice per Market



Source: Euromonitor

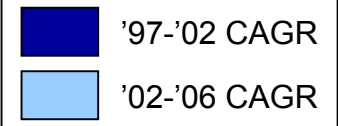
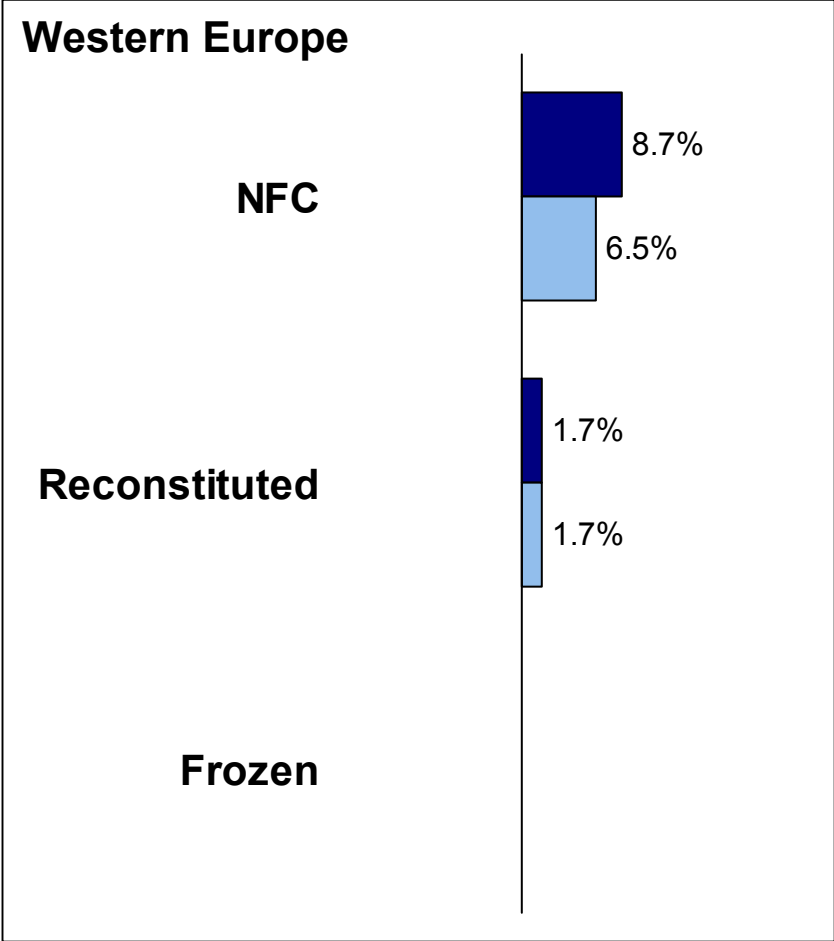
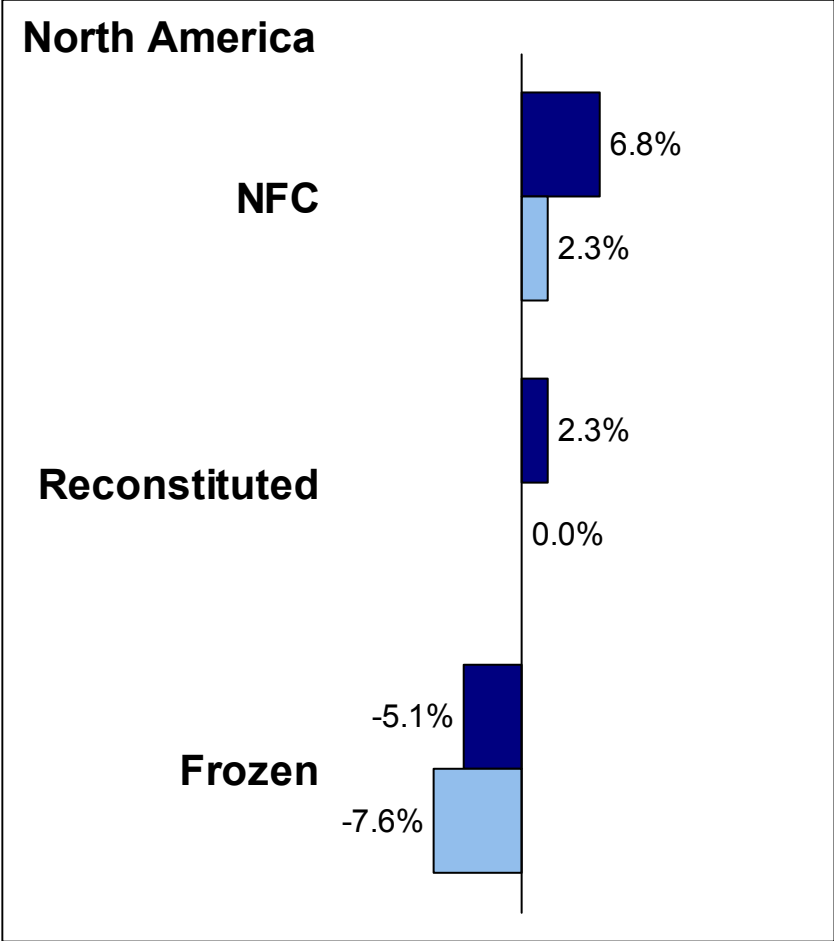


NFC 100% Juice Share and Growth by Continent



Source: Euromonitor

Sector Trends in 100% Juice



Source: Euromonitor



World-Wide NFC Juice Highlights

- ✓ West Europe success: France and UK grow >10%
- ✓ Raw Material cost of Packed NFC greater than 'from concentrate'
- ✓ As standard of living rises so should NFC consumption

Fruit Juice Drinks - Definition

- ✓ 1-99% Juice by composition
- ✓ Still only
- ✓ Carbonates are not included

Fruit Juice Drinks – Why Successful?

- ✓ Showing rapid world-wide volume growth
- ✓ Opportunity for innovation (next slide)
- ✓ Are refreshing for consumers
- ✓ Versatile - consumption is possible at any part of the day
- ✓ Viewed by the consumer as more healthy than ‘non juice’ containing carbonated soft drinks

Fruit Juice Drinks – Why Successful?

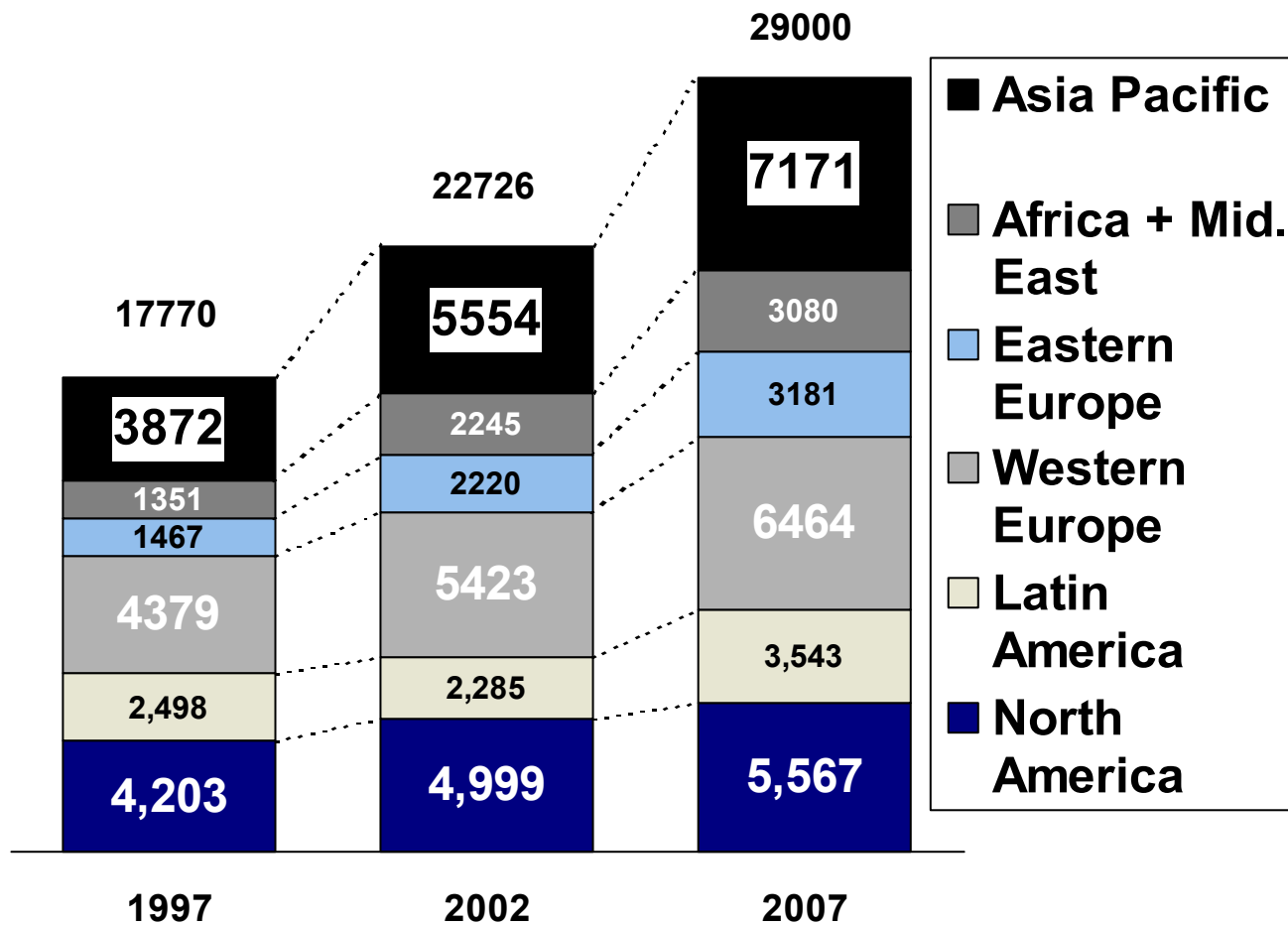
✓ Pushing the Boundary of Innovation

- Combination with other beverage products e.g. milk, cream, water
- Functional Ingredients – Vitamins, Fibres, Calcium
- Kids sector
- Re-hydration mechanism after sport
- Exotics
- Healthy alternative to alcohol

World-Wide Consumption and Growth Juice Drinks

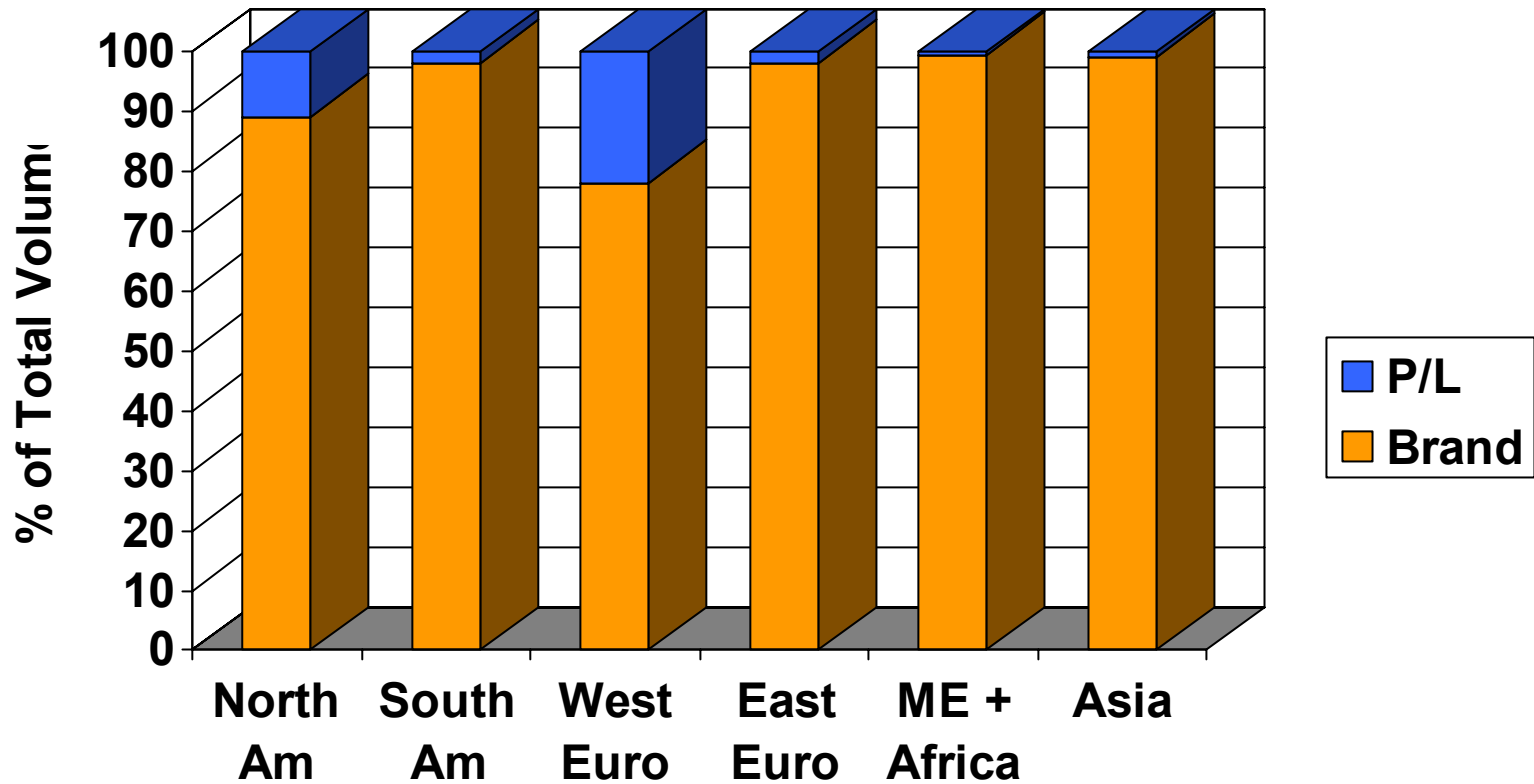
Juice Drink Sales by Region

Volume (Millions of Litres) – Commercially Packaged



Source: Euromonitor

Fruit Juice Drinks - Brand vs Private Label Juice per Continent



Juice Drink Highlights

- ✓ Good growth in all Continents
- ✓ More industrialised nations have high consumption figures
- ✓ Opportunities for innovation
- ✓ Eastern Europe, Middle East and Africa growth > 10%
- ✓ Demand for complexity depends on geography