



Prognosfruit Hamburg 2016



Apple juice in Germany

Trends in production and processing

**Klaus Heitlinger, Association of the
German fruit juice industry**

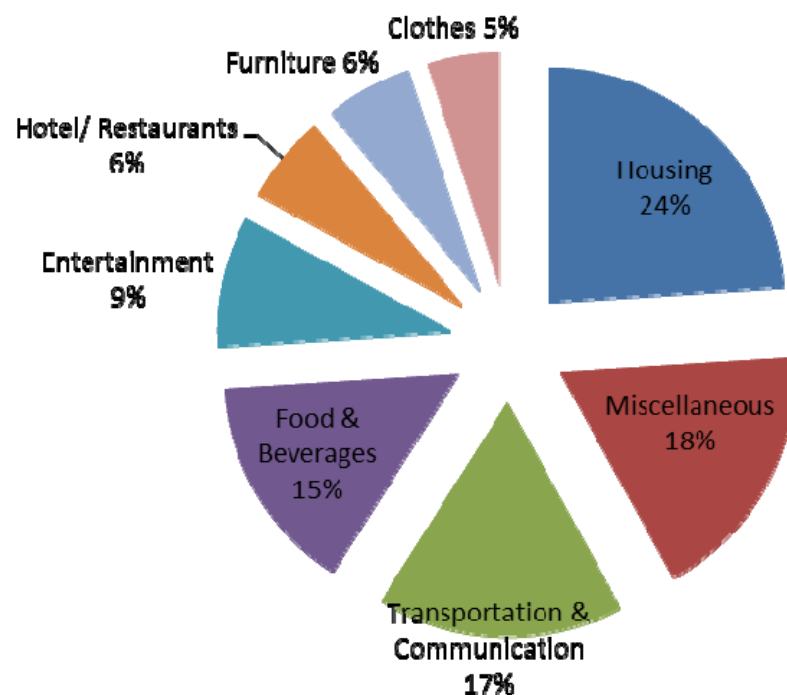
Facts about Germany I (2015)



- **population:** about 81,5 Mio. Habitants, Germany is the most populous member state in the European Union
- **average income:**
 - 32.000 EUR (Germany)
 - 11.500 EUR (Poland)
 - 71.000 EUR (Qatar)
- **gross national product:** 3.091,5 billion EUR
- **import:** 948 billion EUR
- **export:** 1196 billion EUR

Facts about Germany II

How Germans spend their money



Market size for fruit juices in Germany: 4 billion EUR

German priorities



Porsche

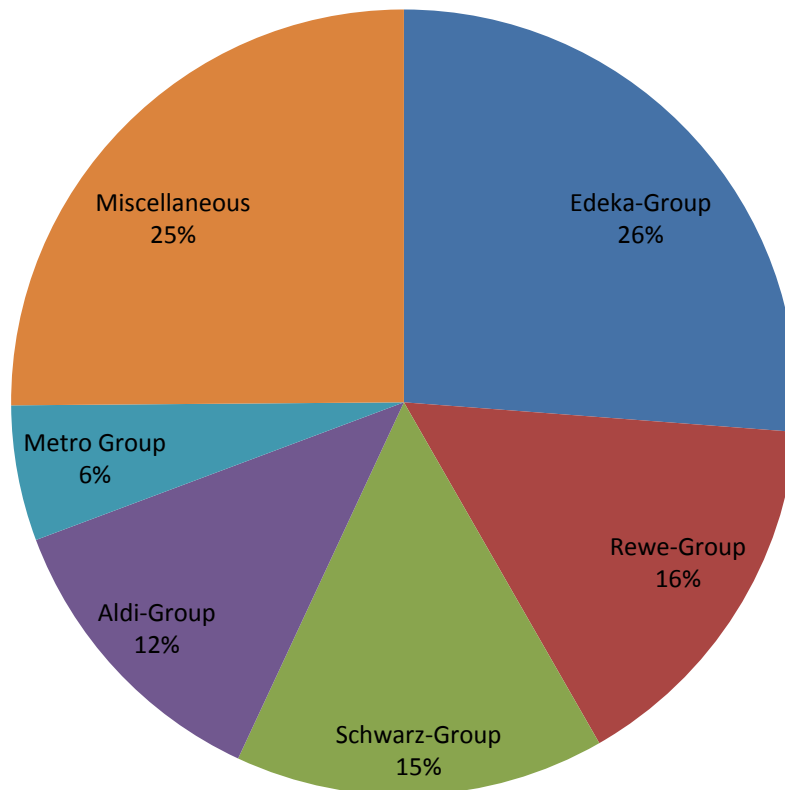
vs

Fridge



Volume of food sales 2015

Volume of Sales Food 2015 in %



Company	Volume of food sales 2015 in Euro
Edeka-Group	48.274.000,00
Rewe-Group	28.569.000,00
Schwarz-Group	28.048.000,00
Aldi-Group	22.794.000,00
Metro Group	10.270.000,00
Miscellaneous	46.289.000,00

2. If you want to deliver to German retail...



**Welcome in
the jungle!**

Retail know-how



- German retailers have own fruit juice companies (Edeka-ELRO) or own bottling facilities (Lidl-MEG)
- Former fruit juice sellers from the industry are now buyers in retail
- Raw material prices are very transparent
- Internet auction for apple juice without seeing the buyer is one possibility of purchase

What did Germans drink in the year 2015?



VdF
Verband der
deutschen
Fruchtsaft-Industrie e.V.

➤ Drinks without alcohol	300 l
- Water (with minerals, carbonized) 	148 l
- Carbonated soft drinks 	119 l
- Fruit juices & nectars 	33 l
➤ Alcoholic drinks	137 l
- Beer 	106 l
- Wine 	21 l
- Champagne 	4 l
- Spirits	5 l
- Fruit wine 	1 l
➤ House drinks	322 l
- Milk 	82 l
- coffee 	160 l
- Tea 	79 l
Total:	758 l

Membership structure VdF

Structure of the German fruit juice industry*

Turnover in million €				Number of companies		percent	Total turnover 2015 in million €* 2015 in million €*	percent
up to	0.26			59	(62)	34.7	5.9	0.2
from	0.26	bis	0.50	15	(11)	8.8	5.3	0.1
from	0.50	bis	1.00	17	(19)	10.0	12.6	0.3
from	1.00	bis	2.00	25	(25)	14.7	37.8	1.0
from	2.00	bis	5.00	14	(14)	8.2	38.6	1.0
from	5.00	bis	10.00	6	(6)	3.5	43.8	1.1
from	10.00	bis	25.00	12	(14)	7.1	195.8	5.1
from	25.00	bis	50.00	11	(11)	6.5	383.4	10.0
from	50.00	bis	100.00	3	(4)	1.8	232.3	6.1
from	100.00			8	(8)	4.7	2,868.5	75.0
				170	(174)	100.0	3,824.0	100.0

Members of the VdF as of 1st January 2016 – 12 affiliated companies are not included

Values as of 1st January 2015 in brackets.

Source: Verband der deutschen Fruchtsaft-Industrie e. V. (VdF)

*provisional values

Overview German fruit juice industry

The German fruit juice industry in figures

fiscal year 2015*

Fruit juice producers	approx. 345
Employees	approx. 7,500
Turnover	3.82 billion €
Industrial production (fruit and vegetable juices/fruit and vegetable nectars/ fruit juice drinks without CO ₂)	3.80 billion litres
Per-capita-consumption (fruit juice/fruit nectar/vegetable juice/ vegetable nectar)	33.0 litres
Per-capita-consumption Apple spritzer	7.8 litres
Fruit and vegetable processing	approx. 900,000 tons
Imports	1.40 billion €
Exports	1.14 billion €

Source: Verband der deutschen Fruchtsaft-Industrie e. V. (VdF)

*provisional values



Regional distribution of the fruit juice producers

Area	Number of companies ¹⁾		Turnover in mil. €	
	2015	2016*	2014	2015*
Verbandsgebiet				
Baden-Württemberg	37	35	349	336
Bavaria	15	14	52	53
Brandenburg/Berlin	12	12	54	55
Hesse	12	12	139	122
Mecklenburg-Western Pomerania	3	4	74	105
Nord	2	22	777	915
Rhineland-Westphalia	23	26	1,072	1,189
Rhineland-Palatinate/Saarland	24	24	1,022	993
Saxony	9	9	14	15
Saxony-Anhalt	9	9	40	39
Thuringia	4	3	4	2
Total	174	170	3,597	3,824

¹⁾ Members of the VdF as of 1st January – affiliated companies are not included

Source: Verband der deutschen Fruchtsaft-Industrie e. V. (VdF)

*provisional values

**We didn't win in France the
european tournament but:**

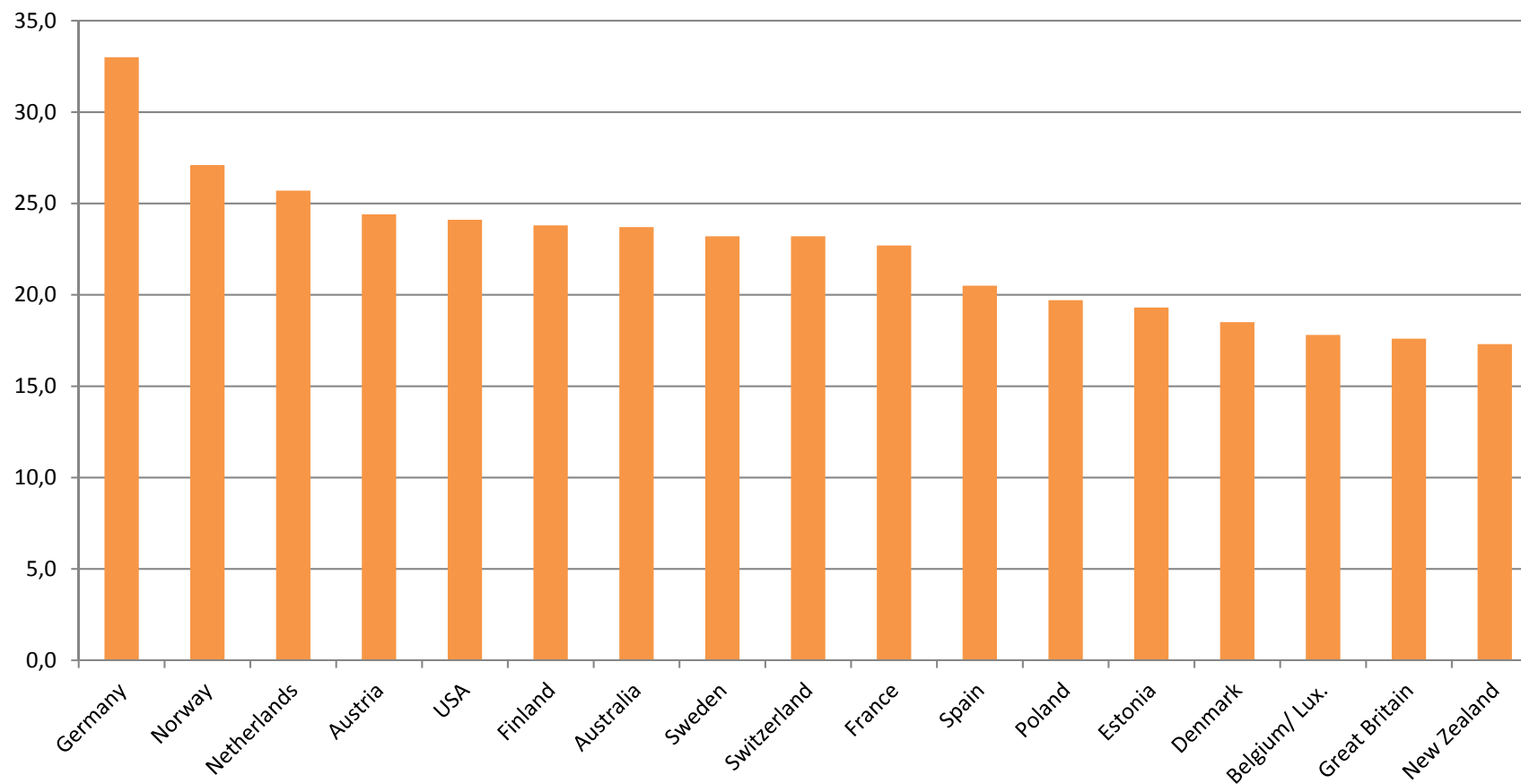
Germany is world champion in
fruit juice consumption



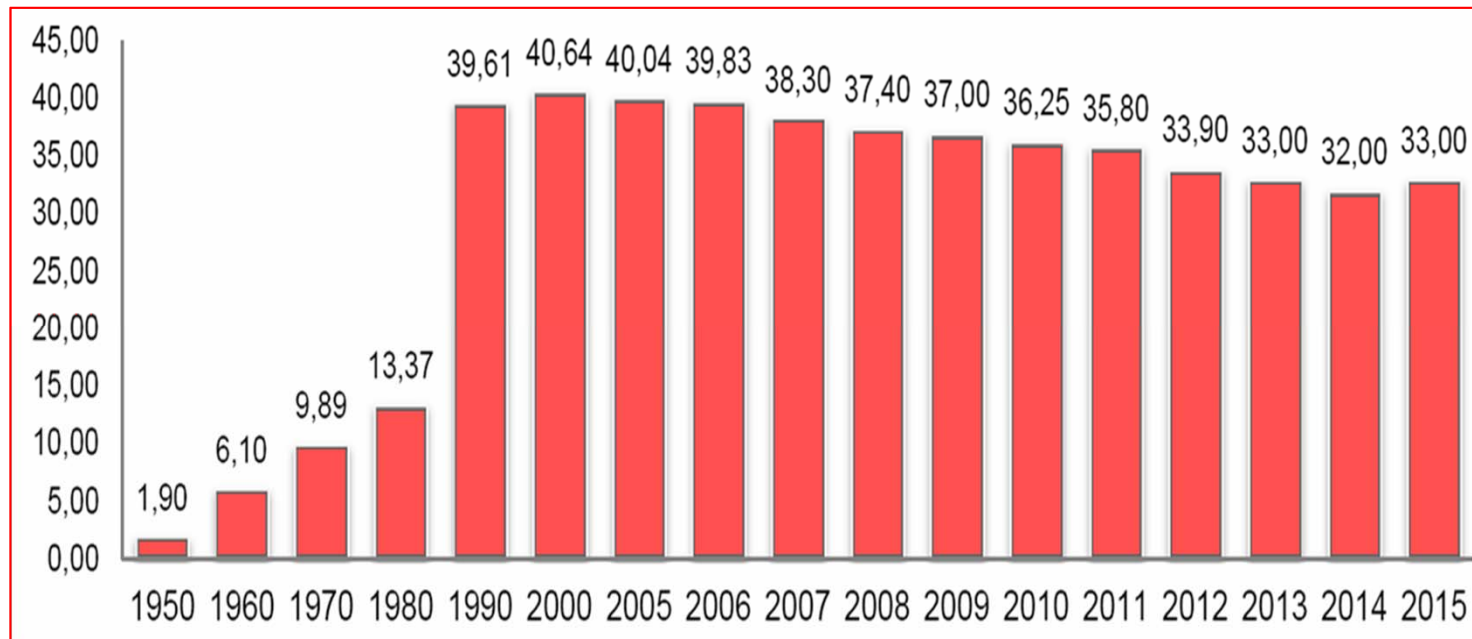
Per capita consumption by country



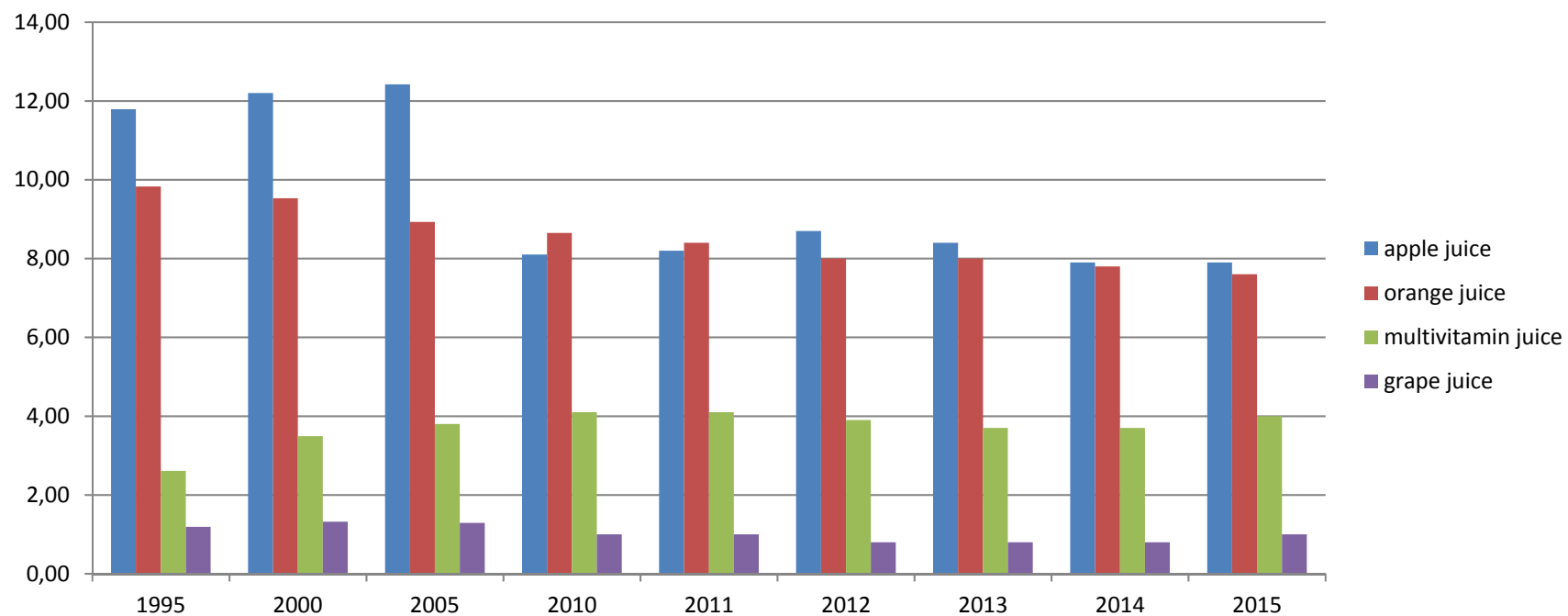
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Development of per-capita-consumption of fruit juices/ fruit nectars in Germany in l



per capita consumption by juice types



Energy drinks as In-beverage young consumers



Energy drinks – with fruit juice!



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Non-alcoholic wheat beer in competition with apple schorle

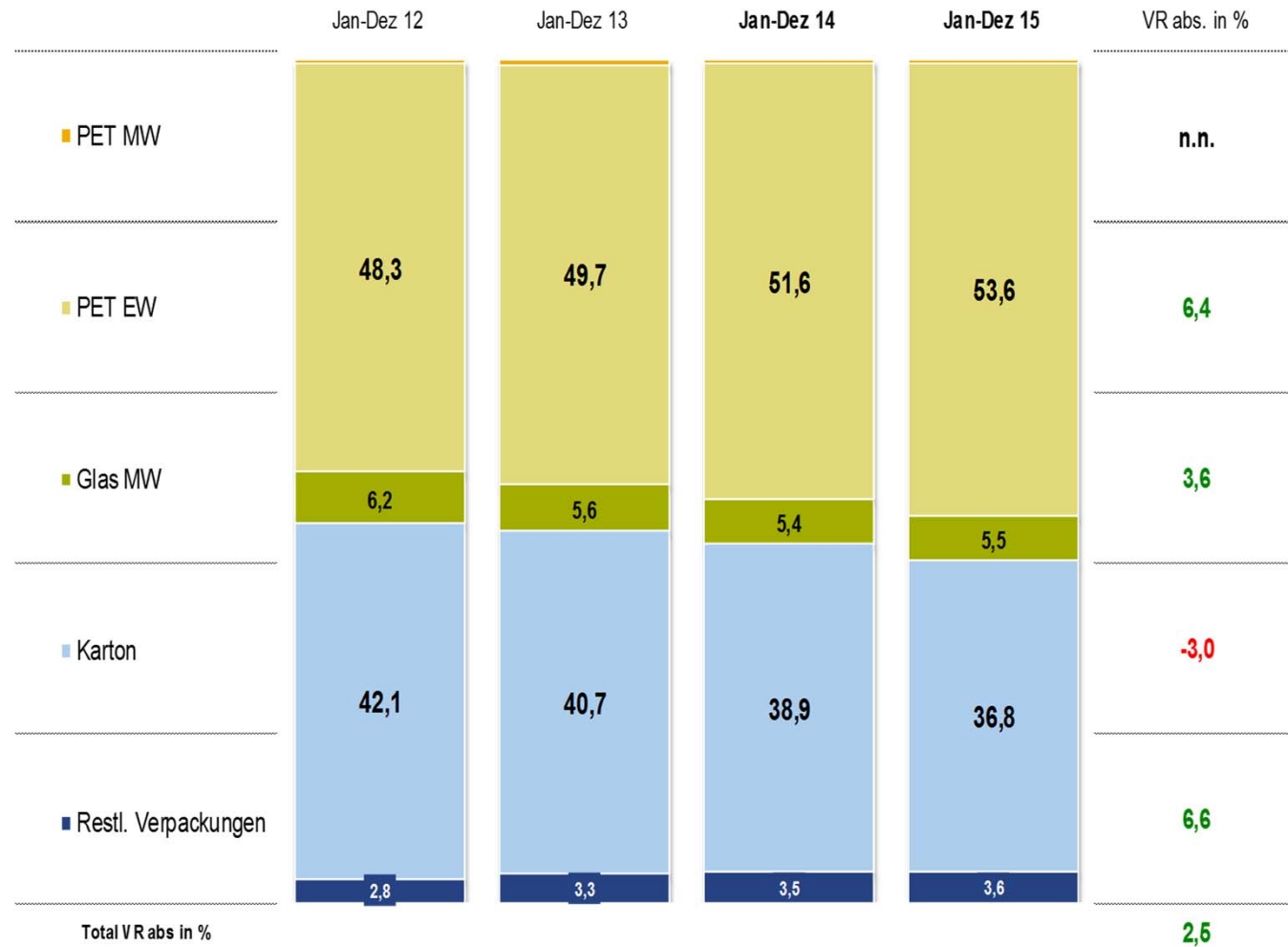


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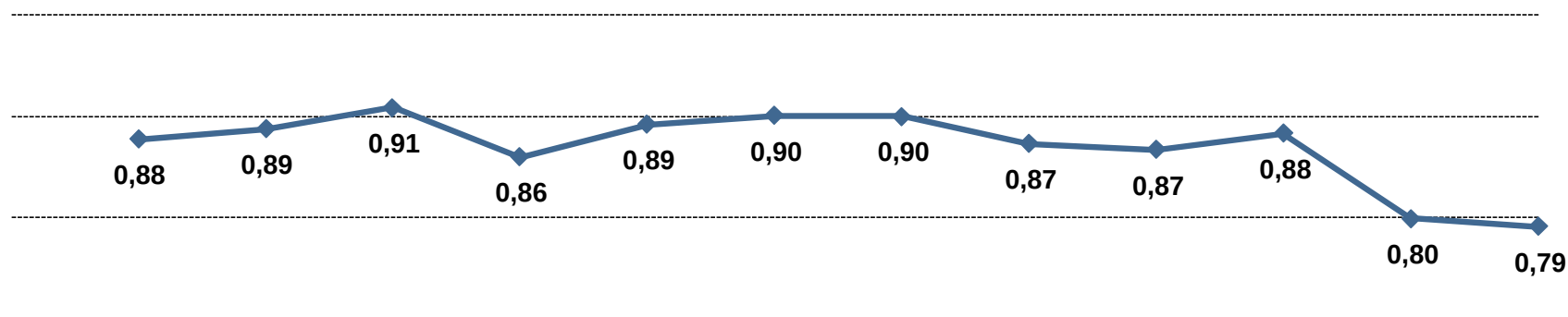
Carton packaging loses in brands and private label, while PET grows on promotions.

Packaging structure FHG

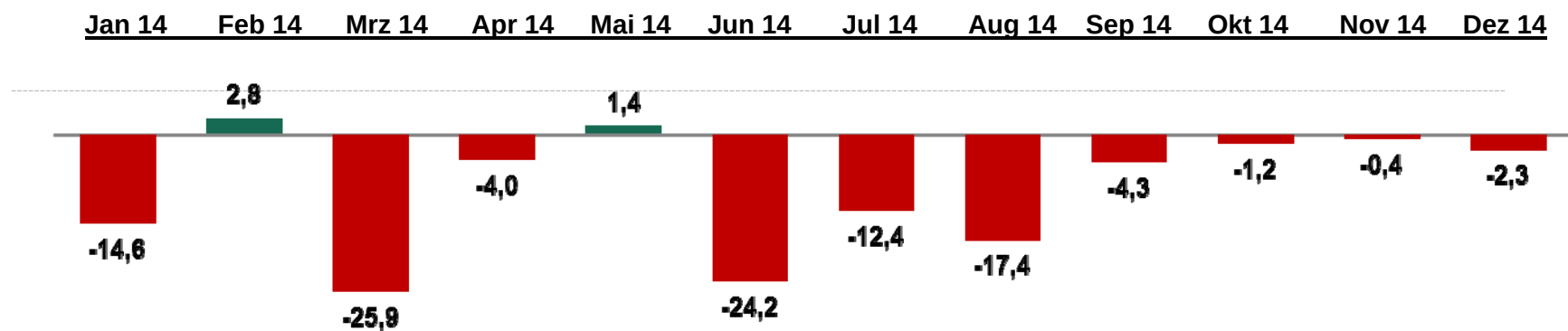


Average prices of apple juice – individual months in 2014

Ø - Preis je Einzelmonat



VR Rate - Menge je Einzelmonat Vorjahr



Juice turned cheaper in 2015 Turnover increased



Apple juice 2016



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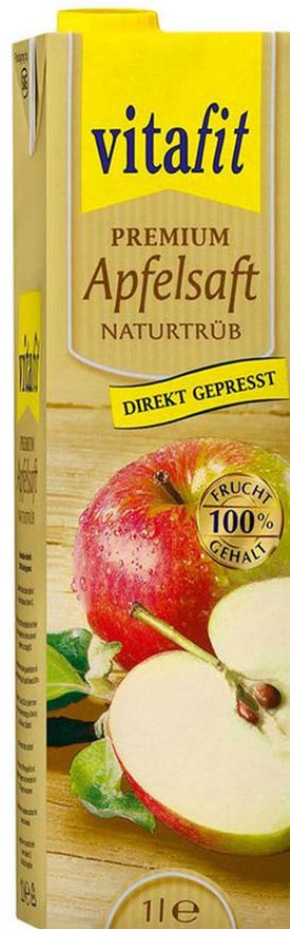
ALDI SÜD
Drachenburgstr. 3
53179 Bonn-Lannesdorf (Mehlem)

	EUR	
2797 Apfelsaft		0,69 B
S u m m e		0,69
1 Artikel		
B a r	EUR	0,69
Nettobetrag	MwSt B	0,58
MwSt	19,0%	0,11
*0294 035/042/002/106 18.04.16 09:44 A-00		

Cloudy apple juice 2016



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LÖDL				
Drachenburgstr. 7 53179 Bonn-Lannesdorf Mo-Sa 8-21 Uhr So geschlossen				
Apfelsaft 1l			EUR	0,89 B
zu zahlen				0,89
Bar				0,89
MWST%	MWST	+	Netto	= Brutto
B 19 %	0,14		0,75	0,89
Summe	0,14		0,75	0,89

Organic apple juice cloudy 2016



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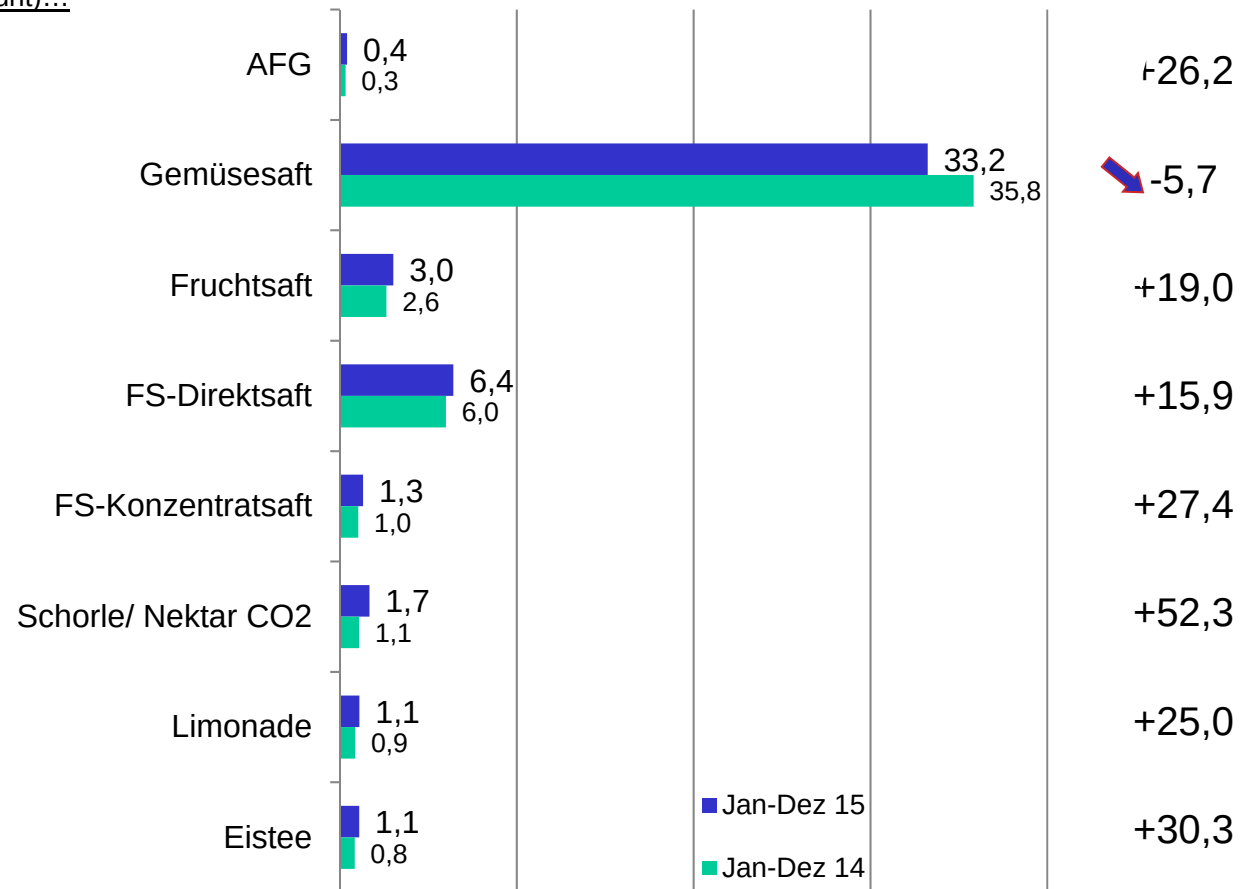
LIDL			
Drachenburgstr. 7 53179 Bonn-Lannesdorf Mo-Sa 8-21 Uhr So geschlossen			
		EUR	
Bio Apfelsaft 1l		1,39	B
zu zahlen		1,39	
Bar		2,00	
Rückgeld		-0,61	
MWST%	MWST	+	Netto = Brutto
B 19 %	0,22		1,17 1,39
Summe	0,22		1,17 1,39

Organic is a small but growing sector in the AFG-segments. In vegetable juices 1/3 of the amount are generated about Organic.

Bio-proportion within relevant AFG-segments

VR abs. in %

Bio-proportion (amount)...



Smoothies strong increase



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Drachenburgstr. 3
53179 Bonn-Lannesdorf (Mehlem)

EUR

43463 Happy Smoothie	0,89 B
S u m m e	0,89
1 Artikel	
B a r	EUR 0,89
Nettobetrag	MwSt B 0,75
MwSt	19,0% 0,14
*0296 035/042/002/106 18.04.16 09:45 A-00	

Apple juice market in Germany



- 8 Liters apple juice per capita equals 650 Mio. Liters
- 50% NFC equals 320 Mio. Liters
- Apple juice from concentrate 320 Mio. Liters or approx. 60.000 tons of apple juice concentrate mainly from Poland and Austria
- import from AJC 2015 total 200.000 tons also for use in other products like e.g. multivitamin juice

Multivitamin juice



Zutatenliste: 46% Apfelsaft*, 24% Orangensaft*, 6,5% Ananassaft*, 5% Apfelmark, Mangomark, Bananenmark, Pfirsichmark, 2,5% Karottensaft aus Karottensaftkonzentrat mit Pulpe, 1,5% Passionsfruchtsaft*, Kiwimark, Vitamin C, Niacin, Vitamin E, Pantothensäure, Vitamin B6, Vitamin B1 (Thiamin), Biotin, Vitamin B12. *aus Fruchtsaftkonzentrat



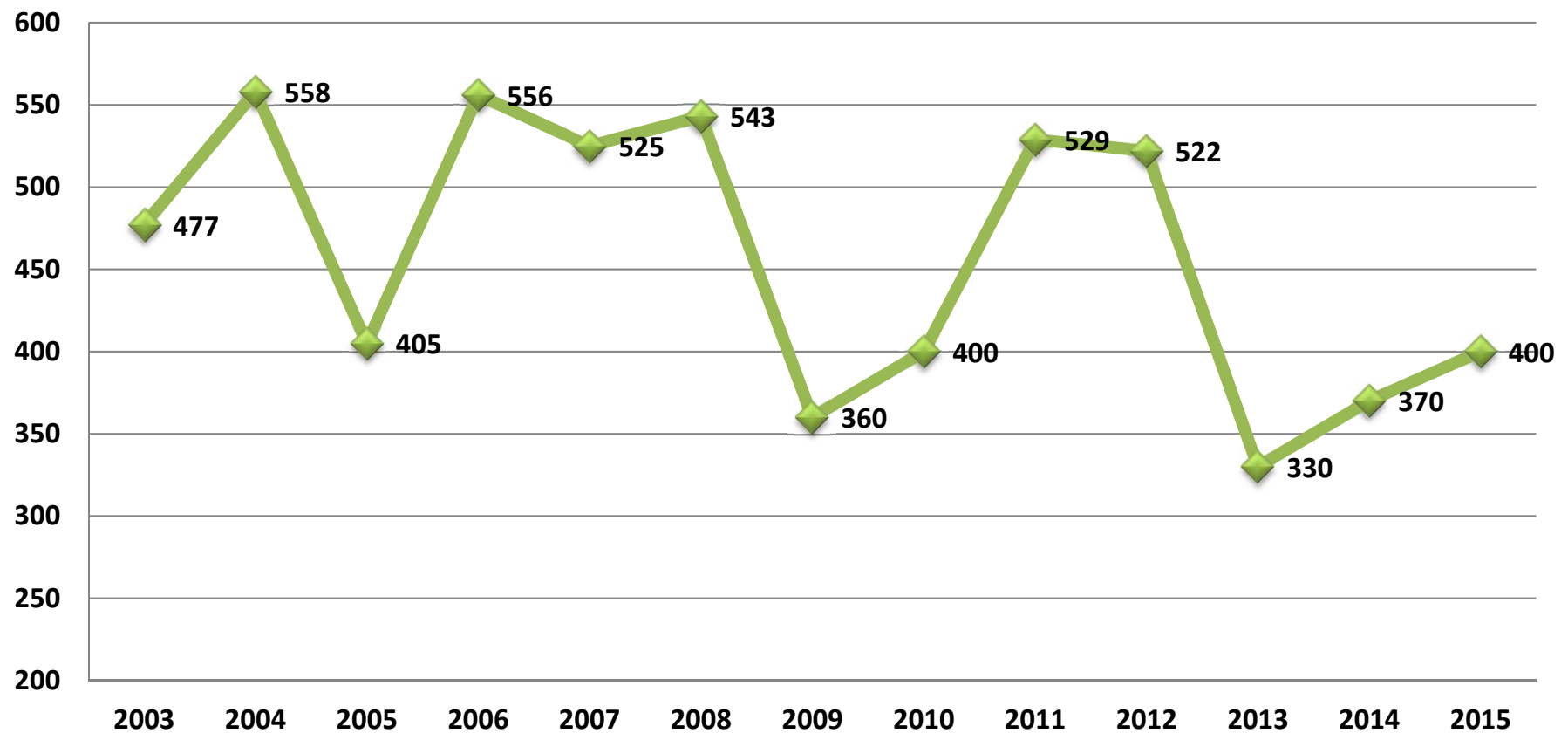
Import D apple juice concentrate

2015 ¹⁾		
Lieferland	Menge in t	Anteil in %
Polen	104.936,6	53,8
Österreich	30.027,8	15,4
Moldau	8.570,9	4,4
Italien	8.371,8	4,3
China	7.214,8	3,7
Türkei	6.200,2	3,2
Ungarn	3.759,0	1,9
Georgien	3.747,9	1,9
Litauen	3.391,9	1,7
Iran	3.259,7	1,7

Total approx. 200.000 tons

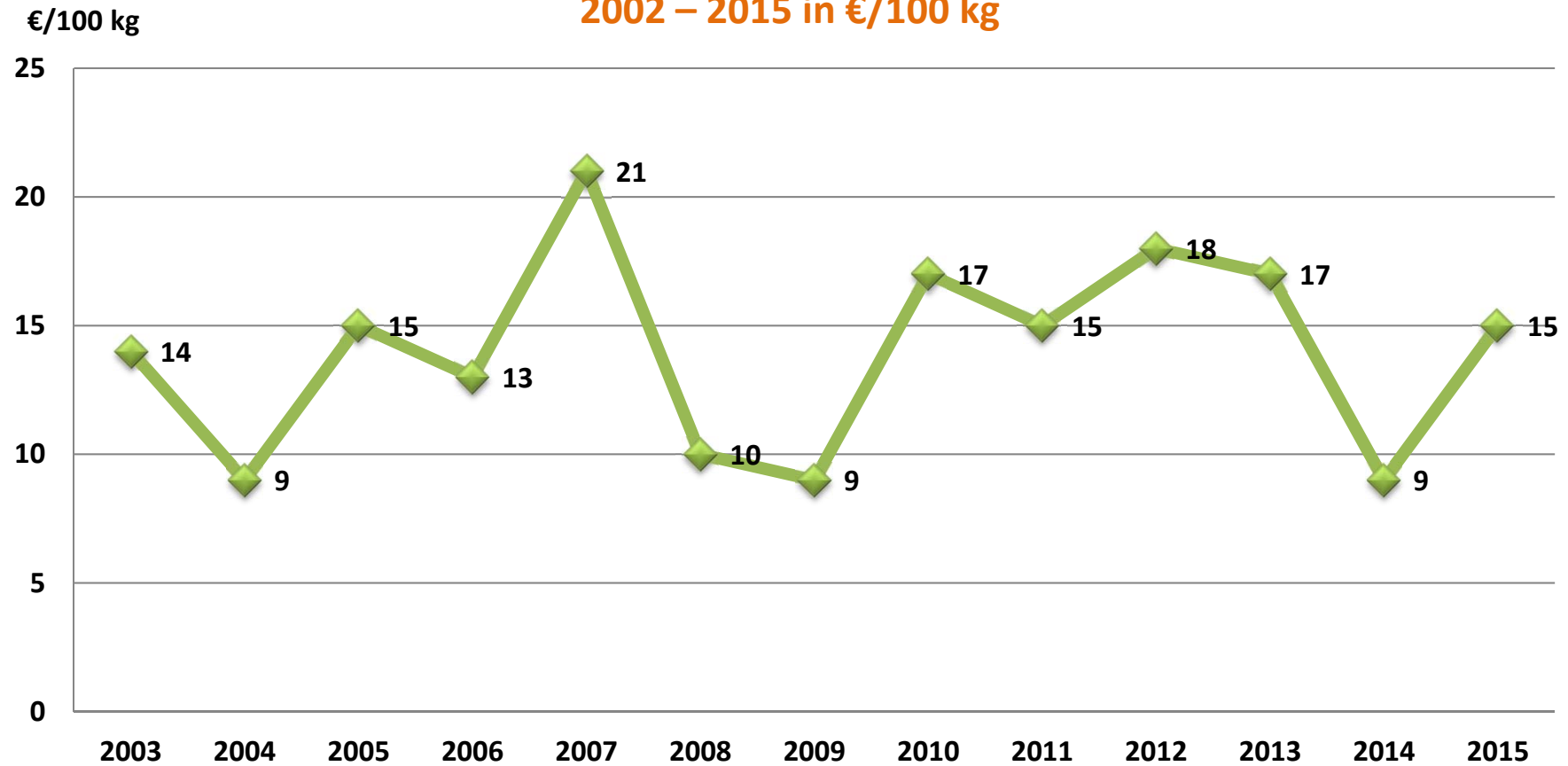
Apple juice production Germany

Apfelsaftproduktion in D 2002 - 2015 in Mio. l



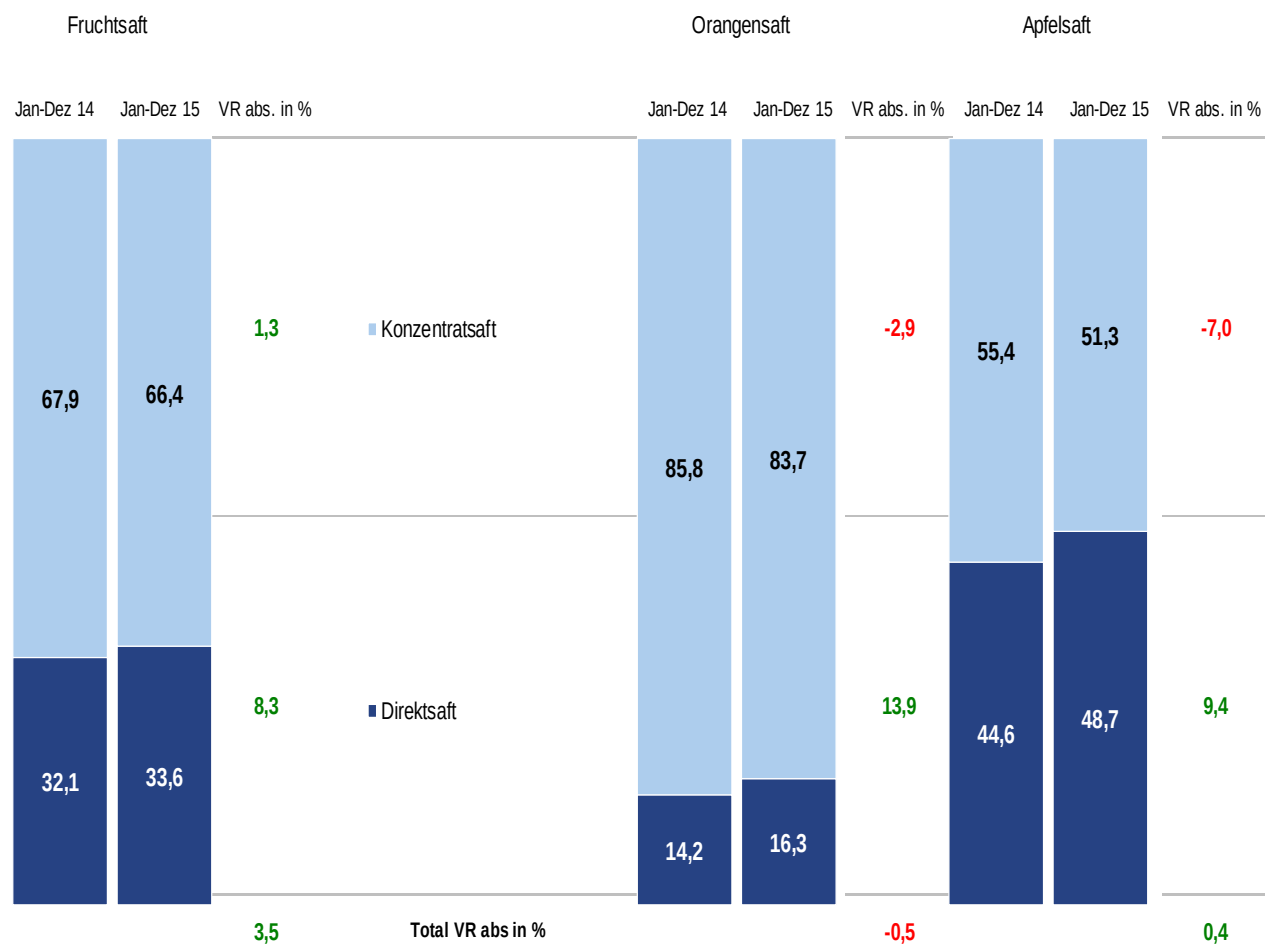
Apple prices in Germany free factory

Frei Silopreise für Äpfel in Deutschland 2002 – 2015 in €/100 kg



Growth of NFC orange and apple. For concentrate the classic varieties apple and orange loses

Direkt-/Konzentratsaft-Anteil innerhalb der Fruchtsaftsorten



Wild apples have a good image in Germany



Wild apples in good condition



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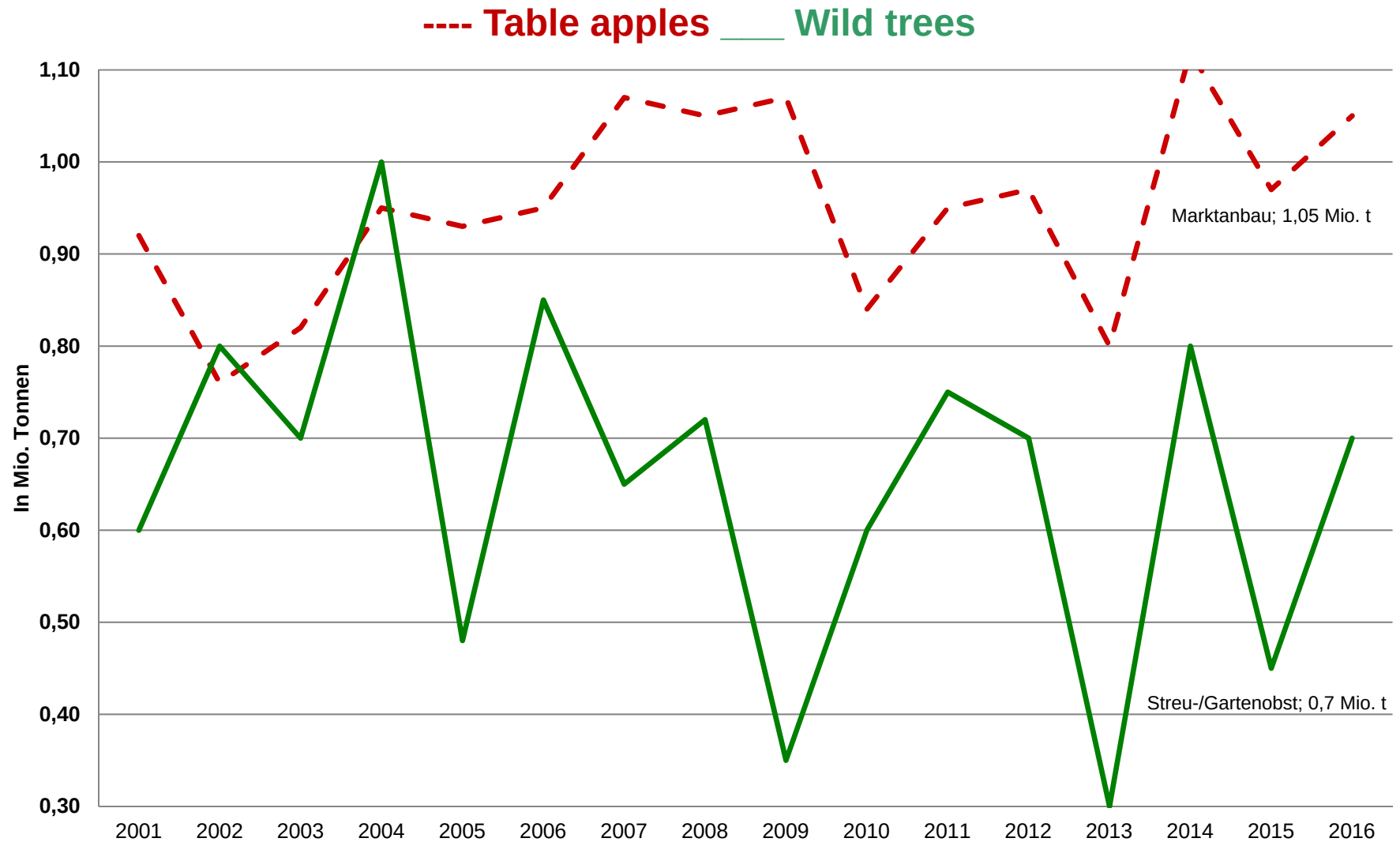


Crop estimation on wild apple trees

700.000 tons in 2016



Crop estimation 2016



Wild apple tree ruins



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Yield per hectare	100 trees x 100 kg	= 10.000 kg
		≙ 10 t
		≙ 100 dt
Producer price per dt	€ 5,00 - € 10,00	
per ha	€ 500,00 - € 1.000,00	
50 % due to alternate bearing	€ 250,00 – € 500,00	

Klaus Heitlinger VdF Prognosfruit Hamburg 2016

Future trend: Industry plantations for acid apple





- Thank you very much for your attention!
- Please come back!
- Don't leave the EU!
- Auf Wiedersehen!