



**Consumers worldwide overwhelmingly see 100% juice as healthy, natural and tasty, according to a new international survey commissioned by Tetra Pak for this report. Our research also shows that brands in both developed and emerging markets are finding creative ways to capitalise on these attributes, introducing innovative new products that are capturing the imagination of consumers and helping drive growth. Such innovations are growing the category too, which has expanded beyond its traditional fruit base to include new sources such as vegetables and exotic plants, notably coconut.**



Welcome to the latest issue of the Tetra Pak Index, which, for the first time in its eight-year history, is focused exclusively on 100% juice.

The 100% juice market today is more dynamic than ever. Mobilised by challenges and opportunities in equal measure, it is responding with ever-more new products and niche offerings. In a category that now stretches from the traditional fruit juices such as orange, apple and grapefruit, to a range of innovative vegetable blends, or the simple goodness of coconut water, the possibilities seem endless.

We see particularly strong growth of 100% juice in emerging markets, with consumption in countries such as China (see page 21) and Brazil (see page 23) rising at a fast pace, and promising even greater things for the future. Combined with other growth hotspots, such as Malaysia, India and Indonesia, we expect rising demand in these new 100% juice nations to more than offset declines in recession-hit established markets, returning the category to global growth going forward.

In North America and Europe, 100% juice's traditional heartlands, the market remains tough, prompting brand owners to explore new opportunities for growth, as we highlight in this report. Not-from-concentrate 100% juice is gaining share from its reconstituted namesake, reflecting a clear trend for natural products. The top end is performing particularly well, both in terms of volume and price, with consumers willing to pay more for products that offer what they are after, especially when it comes to health and wellness.

As our consumer survey shows, healthy and natural are the two standout characteristics associated with 100% juice, alongside tasty. Indeed, 100% juice is still widely cited in expert nutritional advice as a key contributor to a healthy diet, particularly as an easy and convenient way to secure one of the five daily portions of fruit and vegetables recommended by the World Health Organization – a target that the majority of adults and children are still failing to meet.

It is, therefore, no surprise to find that, while our survey shows wide awareness of the sugar debate, which has attracted much media interest and industry concern in some markets, few consumers doubt the goodness of 100% juice. That said, excessive sugar consumption is a public concern in many countries, and our survey does show that, in some cases, consumers have lowered their consumption of 100% juice as a result. It is quite clear that there is a good deal of confusion, spurred by alarmist media coverage, sometimes from less-than-rigorous sources.

On the plus side, it is worth noting that none of the existing regulatory actions to address sugar consumption target 100% juice, which has no added sugar. We strongly believe, therefore, that by working together to bring clarity to the debate, the sugar issue can be turned into an opportunity within the 100% juice category. Campaigns are now under way in Europe to do just that, such as the programmes driven by AIJN, the European Fruit Juice Association (see page 07).

As ever, the key to success is innovation: offering the right product at the right time to meet the modern consumer's needs – and, just as importantly, capturing their attention and making a connection. An excellent example of this is packaged coconut water, a formerly niche or loose product that has become a global phenomenon with extraordinary speed. Yes, the market is ever more crowded, complex and competitive; but look how exciting and rewarding it can be, too.

I hope you enjoy this report and find it both informative and inspiring.

**DENNIS JÖNSSON**  
PRESIDENT AND CEO, TETRA PAK