Flavour Trends in Juice/Juice Drinks & Iced/Rtd Tea Drinks

A Special Focus Report from Canadean

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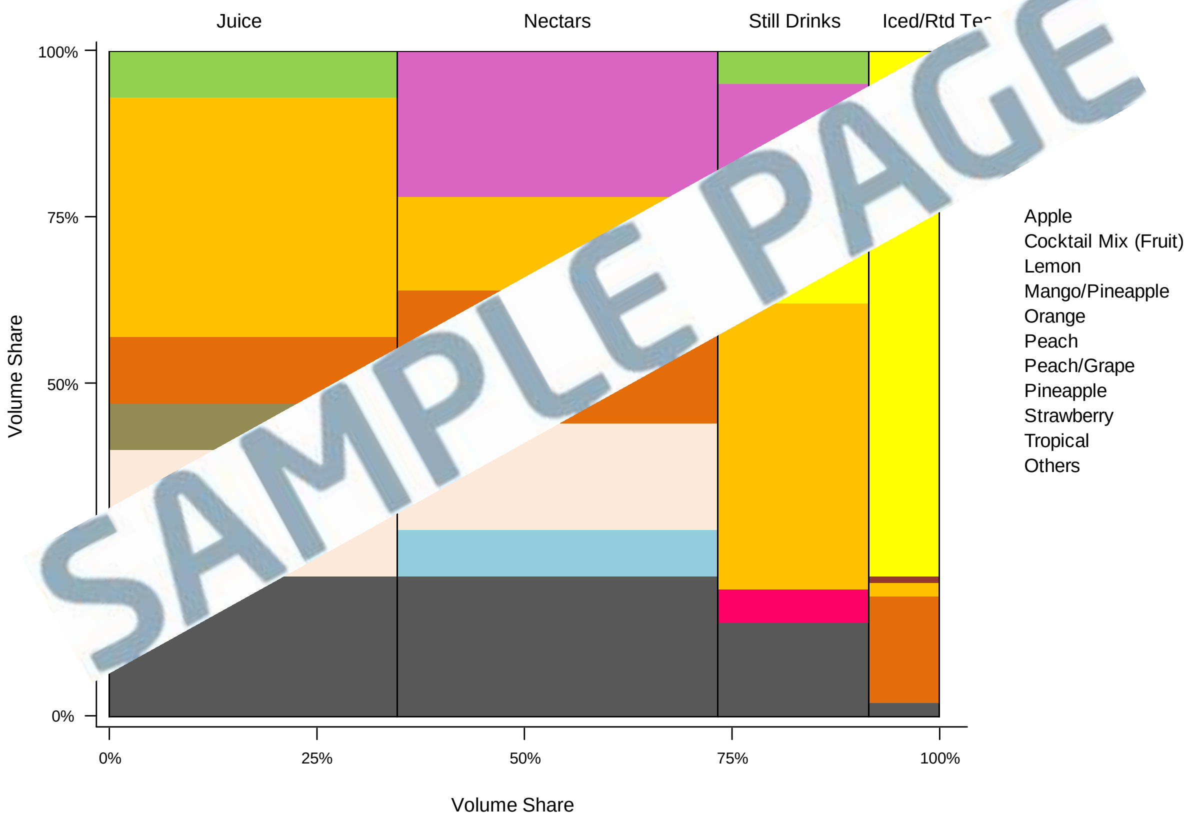
Contents

SPAIN

Spain Juice, Nectars, Still Drinks & Iced/Rtd Tea Drinks Top 5 flavours (volume), 2009



Source : Canadean

Spain Juice, Nectars, Still Drinks & Iced/Rtd Tea Drinks Top 10 Flavours (v[illegible]

	Volume M Litres					[illegible]				
	2005	2006	2007	2008	200[illegible]	[illegible]	[illegible]	2007	2008	2009
Juice/Juice Drinks & Iced/RTD Tea Drinks										
Orange										
Pineapple										
Peach										
Cocktail Mix (Fruit)										
Lemon										
Tropical										
Apple										
Peach/Grape										
Grape										
Orange M[illegible]										
Oth[illegible]										

Source[illegible]

Note: Fla[illegible] data is reported and discussed at the lowest available level. For example, single orange flavour is reported independently from mixed orange flavours such as orange/peach. Where no single flavour in a blend is perceived to be dominant these are categorised as for example cocktail mix (fruit), tropical, fruit punch, berries etc.

Juice

Orange remains by far the leading flavour and is the focus of increasing segment ... ut pulp, freshly squeezed, no added sugar - all aimed at building value. The with/witho ... added sugar orange segments continued to be very active with new entrants and pac ...

Flavours such as peach, tropical and mixed fruit are becoming more ...

Juice, particularly premium chilled NFC orange, is primari ... breakfast time. Increasingly juice, mainly FC mixed fruit, is becoming popular as ar ... ildren.

MOS (made on the spot) freshly squeezed or ... adily gaining presence in Horeca channels; some companies such as Zumex have f ... juice squeezing machines.

PepsiCo extended the Tropic ... the addition of melon/jasmine/pineapple, mixed fruit, orange/grape/mandarin, ar ... ant flavours.

El Corte Inglés i ... juice range under its PL of the same name. Juver launched Juver Squeezed C ... Pascual extended the Pascual range with a chilled, slightly sweetened orange juice

Nectars

Peach is the most popular single flavour, with some 21% share, followed by pineapple. Third placed orange lost volume despite the ‘no added sugar’ activities of Mercadona and Eroski.

Mixed flavours were popular among new product launches, although there were some single flav ... such as orange.

Still Drinks

Orange flavour increased its share of the chilled segment, th ... of Simon Life, and a decline in Sunny Delight lemon and strawberry flavours.

In the ambient segment, lemon gained share th ... e of Don Simon Limonada (Garcia Carrion) and Minute Maid Limón & Nada (Co ... tion.

Lemon and orange were both popul ... new product launches (particularly lemon). PepsiCo revamped the Radical range wi ... range, wild fruit seduction, kiwi fascination and red fruit.

Dairy-based still drink ... gh price positioning, while flavoured sweetened water share fell below 10%.

PL share incre ... some PL brands capitalised on the success of Minute Maid Limon & Nada with the rapid launc ... cloudy lemon products. PL is expected to continue to advance in 2010 in the poor economic climate

Iced/Rtd Tea Drinks

Original segmentation by flavour (lemon, peach, orange, mango) based on [illegible] was followed by segmentation by tea variety (green, red, white, rooibos) mainly featuring lemo[illegible] more recently, by a wider range of flavour/tea combinations such as white tea with melon.

Green tea variants have been adopted by major Private Lab[illegible] niche carved by Lipton (Unilever) and Fontvella Sensacion (Danone).

Segmentation is welcomed by retail chains as it [illegible]rest. Traditional on-premise channels generally stick to regular lemon or peach bla[illegible]oreca chains extend this basic range with low calorie variants; other tea varieties a[illegible] premise channels.

PRODUCT DEFINITIONS

Juice

100% pure fruit juice or vegetable juice with no added ingredients, except permitted minerals and vitamins for the purpose of fortification and permitted additives. Salt, spices and herbs may be added to tomato juice.

Sweetening agents with less than 2% moisture (sucrose, dextrose anhydrous, glucose and fructose) may be added; syrups (liquid sucrose, invert sugar solution/syrup, fructose syrup, liquid cane sugar, isoglucose and high fructose syrup) may only be added to juice from concentrate/concentrated fruit juice. If flavours or colouring from sources other than the reconstituted fruits are included the product cannot be categorised as a juice regardless of juice content. May contain pulp and cells from the same kind of fruit.

Includes products:

- **from concentrate** - the fruit/vegetable is squeezed and concentrated through evaporation of natural water content by evaporators, before being frozen and shipped to the country for use for packaging. The product is then reconstituted to its original strength by addition of the same amount of water
- **not from concentrate** - the fruit/vegetable is squeezed in the country of origin, lightly pasteurised and frozen or aseptically packed for shipment to where it will be sold
- **chilled** - relates to products that are distributed and sold via the chilled distribution chain. These products will be marketed and positioned as chilled products and will usually be perceived by consumers as requiring chilling (although this may or may not be technically necessary)
- **ambient** - relates to products that are distributed and marketed via an ambient distribution chain. Note, these products may be placed in chillers at the point of sale, eg in convenience stores because consumers prefer to purchase a chilled beverage, but would not usually be perceived as needing to be chilled
- **frozen concentrated juice** (expressed in ready to drink volume) - where the reconstituted product conforms to the definition of juice above

Excludes carbonated juice (included in carbonates).

The flavour that is deemed to be dominant decides which flavour category the flavour belongs to. The dominant flavour is the one that is perceived to be dominant either because it is the first listed in the product description or, because it is perceived to be the dominant flavour as marketed by the producer. **Mixes/blends** that contain dominant flavours that have their own flavour category in the global database are to all intents and purposes seen as 'single' flavours for the purposes of classification. Where no single flavour in a blend is perceived to be dominant eg in fruit-based combinations such as red berries, forest fruits or tropical mixes, these are categorised as **cocktail mix**.

Nectars

Diluted fruit/vegetable juice and pulp, to which sweetening agents (eg sugar, honey, syrups and/or sweeteners), permitted minerals and vitamins for the purpose of fortification and permitted additives may be added.

If flavours or colouring from sources other than the reconstituted fruits are included the product cannot be categorised as a nectar regardless of juice content. May contain pulp and cells from the same kind of fruit.

Whilst juice content is required to be equal to or in excess of 25% by volume, minimum juice content varies according to the fruit in question. Includes products from concentrate and not from concentrate (see definition under Juice), chilled and ambient products (see definition under Juice).

Excludes concentrates which when reconstituted conform to the definition of nectars above; these are included in squash/syrups.

Excludes carbonated products such as **Schorle**, **Mineralwasser Plus**, carbonated nectars and products such as **Gespritzte Fruchtsaefte** (included in carbonates).

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Still Drinks

Flavoured ready to drink, non-carbonated products, which may be fruit or non-fruit flavoured and have a juice content of 0-24.9%. Sugar, artificial flavouring and colouring may be added.

Excludes non-carbonated **tea-based** and **coffee-based products** (included in **iced/rtd tea drinks** and **iced/rtd coffee drinks** respectively) and non-carbonated **sports drinks** and **energy drinks**.

Includes sweetened non-carbonated water-based flavoured beverages (eg Coca-Cola's Glaceau Vitaminwater).

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Iced/Rtd Tea Drinks

Carbonated and non-carbonated ready to drink (rtd) packaged tea-based drinks and non-ready to drink (non-rtd) powders and liquid concentrates which dilute with water to make a product similar/identical to the ready to drink product. Includes products based on black, green, oolong, barley, rooibos, white and mate tea, as well as fruit, flower and herbal teas. Products can be cold or hot-filled and based on brewed tea or tea extract. They may contain additional flavourings, typically fruit, floral or herbal, fruit juice, sweeteners and other ingredients.

The category includes all products that have tea as their base flavour regardless of the percentage of milk or soymilk content (ie this may be more than 50%). **All powders and concentrates are expressed in ready to drink (rtd) volumes**.

The category also includes all products that have tea as their base flavour regardless of the percentage of juice content. Typically this is in the range of 5-30%, but premium products with higher juice content are also available in some markets such as the USA.

Includes tea and energy blends where tea is the base ingredient. **Excludes** tea and energy blends, where the base formulation of the product is an energy drink and tea is the flavour, products are categorised under energy drinks (see below).

Where product is made to order in chain coffee shops (such as Starbucks) from packaged ingredient, volume is recorded as packaged (eg carton, sachet, bag in box) but where product is not derived from a packaged input eg in independent restaurants and coffee shops, volume is recorded as 'unpackaged'.

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Smoothies

Smoothies comprise blended fruit puree and juice drinks with a thick, smooth texture, sometimes incorporating a dairy element (yogurt) and/or functional elements (eg aloe vera, gingko, ginseng):

Both chilled and ambient products can be found

Positioned as fresh and pure, most smoothies do not contain artificial flavours, additives or sweeteners

The definition includes packaged products and products made to order in on-premise outlets

Products with a 'smoothie' positioning can be found in the juice and nectars categories, depending on juice content and/or ingredients. Where there is some dairy content, this is highlighted using the Ingredients Base attribute (eg contains yogurt)

Includes smoothies containing less than 50% yogurt:

Excludes products containing more than 50% yogurt which are included in the drinking yogurt segment under Dairy Drinks