The European market potential for pineapple juice

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In the long term, the European market for pineapple juice is expected to show slow growth. This growth is likely to be driven by changes in the consumption patterns of European consumers, including rising demand for healthier and tropical drink options and the use of pineapple juice in new drink products. The Netherlands, Spain, Italy, Germany, France and Germany offer the best opportunities for developing country suppliers.

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1. Product description

Pineapple juice is a popular tropical beverage. It is made from the pineapple fruit, which is native to South America. Pineapple is widely grown in Asia (Thailand, Philippines, Malaysia, China and India) and South America (Brazil and Costa Rica), with Brazil being the world's largest producer.

Pineapple juice is obtained by a mechanical process from the flesh or parts of ripe pineapple fruit (*Ananas comosus*). The main pineapple varieties used for juice are Smooth Cayenne, Abacaxi (Pemambuco or Perola) and Queen. Pineapple juice may contain finely split insoluble materials, but does not contain shell fragments, seeds, other coarse or hard substances or extra pulp. For practical reasons, juice for export is usually concentrated and later reconstituted with water. This lowers transportation costs, which would otherwise include costs for water and packaging. Juice from various sources can be mixed and canned as pineapple juice with or without added sugar. It can also be clarified, refined and condensed for canned pineapple syrup.

Vitamins and minerals can be added to the fruit juice under Regulation (EC) No 1925/2006, and additives in accordance with Regulation (EC) No 1333/2008. Other allowed ingredients are restored flavour, pulp and cells.

The quality of pineapple juice is defined by the following parameters:

- Colour: characteristic of the variety, most commonly golden yellow to amber.
- Flavour and odour: distinct pineapple flavour and odour, free from foreign flavours and odours.
- Pulp content: pulp content may vary and is normally between 6 and 18% in concentrated pineapple juice. Importers may require more pulp content as visible pulp in juices is becoming more popular among European consumers.
- Brix level: concentrated pineapple juice quality is mainly defined by 'Brix level' (sugar content of an aqueous solution), which directly affects product price. Under trade classifications, the highest category for pineapple juice is a Brix level higher than 67. However, in European industry practice, the most common concentrated

pineapple juices are around 60-61 Brix or 65 Brix. Under European Union Directive 2001/12/EU, the minimum Brix level for reconstituted pineapple juice is 12.8.
- Acid level: alongside Brix level, the level of citric acid is the main parameter determining product quality and price. Usually, acid levels for concentrated pineapple juice are 2-4% citric acid. Acid levels vary between pineapple varieties and producing countries. The most common variety of pineapple used for juice production in Asian countries is Smooth Cayenne, while in Costa Rica it is MD2 or Golden Pineapple. Another important quality parameter is the Brix-to-acid ratio. The higher this ratio, the higher the quality of the juice. Usually, juice made from Golden Pineapple has a 23:28 ratio, while Smooth Cayenne juice has a 15:20 ratio. However, the lower-ratio (and sweeter) juice from the MD2 variety is used to produce 'Not from Concentrate' juices (NFC).

Table 1: Products in the pineapple juice product group, with product codes

Combined Nomenclature Number	Product
200949	Pineapple juice, unfermented, Brix value > 20 at 20°C, with or without added sugar or other sweetener (excluding containing spirit)
200941	Pineapple juice, unfermented, Brix value ≤ 20 at 20°C, with or without added sugar or other sweetener (excluding containing spirit)

Source: Eurostat

2. What makes Europe an interesting market for pineapple juice?

Europe is the world's largest importer of pineapple juice and accounts for more than 45% of global imports. European imports of pineapple juice increased in volume by an average of 1.2% annually between 2017 and 2021 and decreased by 1.2% in value during the same time period. This indicates a decrease in pineapple juice import prices over the last five years. In 2021, Europe imported 374 thousand tonnes of pineapple juice, valued at €358 million. In Europe, 21% of pineapple juice imports came from developing countries, 37% from the rest of the world and 42% from intra-European trade, mainly re-exports, which may contain some value-added processing such as reconstituting the juice from a concentrate. Between 2017 and 2021, European pineapple juice imports from developing countries remained largely stable, increasing by only 2% altogether.

In the next five years, the European market for citrus and tropical juices is likely to grow at an annual rate of 1.0-1.5%. Wellness and health trends have increased consumer demand for juices. Manufacturers are redesigning product offerings to suit different diets, lifestyles and age groups. Product innovations using natural ingredients are driving expected growth of the juice market in Europe. Pineapple juice is used as a component in carbonated beverages, 'low-calorie' drinks, functional drinks, flavoured waters, energy drinks, smoothies, fruit preparations, confectionary and other goods.

European consumers are drinking less but better-quality juices, especially with 100% fruit content. Widespread information about the high sugar content of fruit drinks has led to concerns among European consumers and negatively impacted the pineapple juice market. In response, a number of promotional campaigns, including the European Fruit Juice Association's 'Fruit Juice Matters' campaign, have been launched to encourage fruit juice consumption. This is educating consumers about the difference between added sugar and natural fruit sugar. Pineapple ranks among the top five flavours in many European countries, including Spain, France, the UK, the Netherlands and Germany.

Note: The figure above represents apparent consumption (the difference between imports and exports). There is no exact data about consumption per country.

European consumption of pineapple juice was estimated at 145.9 thousand tonnes in 2021. Over the last five years, apparent consumption grew by an average annual rate of 7%. France, Germany, Spain, the UK, Belgium and Italy are the largest consumption markets.

3. Which European countries offer the most opportunities for pineapple juice?

As Europe’s main importer of pineapple juice, the Netherlands is an interesting focus market, important trade hub and significant re-exporter of imported pineapple juice. France also provides good opportunities for pineapple juice. Other European countries that are large net importers of pineapple juice are Germany, Spain, Belgium and the UK.

The Netherlands: the largest European importer and trade hub

The Netherlands is Europe’s largest importer of pineapple juice and a major re-export hub. It is home to some of the largest European traders. In 2021, the Netherlands accounted for 40% of total European imports by volume. In 2021, total Dutch imports came to 150.6 thousand tonnes, valued at €139.2 million. More than 90% of these imports were re-exported to other European countries, mainly Germany and France. Dutch consumption was only an estimated 10.9 thousand tonnes. However, domestic consumption has been increasing at an average annual rate of 11%. Dutch imports decreased by on average 3% in value while increasing 1% in volume annually between 2017 and 2021, amounting to a 2% average yearly decline in import price.

In 2021, 59% of Dutch pineapple juice imports by volume came from Costa Rica, followed by Thailand (10%), the Philippines (9%), Indonesia (5%), Brazil (4%), Kenya (3%) and South Africa (3%). The two main suppliers of pineapple juice to the Netherlands, Costa Rica and Thailand, have seen their market share decline, Costa Rica by on average 1% per year and Thailand by 13% per year. Suppliers that have been increasing their market share include Brazil (34% yearly growth) and Indonesia (17%), as well as the Philippines and Kenya.

Dutch consumption of pineapple juice has benefitted from consumer wellness and health trends, leading to interest in its health properties. Consumers are also increasingly demanding organic juices. Demand has been negatively affected by concerns over sugar content in fruit juices, as well as by competition from other novelty juices and juice mixes. However, pineapple juice is also increasingly being consumed as a healthy beverage and in instant drinks. Citrus and tropical juices are now also being used in low-calorie drinks such as flavoured waters (for example, SPA fruit lemonades). Tropical juices such as pineapple are popular with Dutch producers of mixed juices, which are usually labelled ‘Tropical’ (*Tropisch*), ‘Exotic’ (*Exotisch*) or ‘Multivitamin’ (*Multivitamine*).

Examples of Dutch tropical juice companies are SVZ, Prodalim, Verbruggen Juice Trading, Ariza (specialised in organic products) and Santos Enterprise Food. The leading European processor and trader, Döhler, also sells large quantities of juices through its Dutch subsidiary (Doehler Holland BV). Private labels of juices and nectars account for half of total retail sales. The leading retail chain, Albert Heijn (owned by Ahold Delhaize), sells juices under its own ‘AH’ label, which are packed by Refresco. The leading independent juice brands, Appelsientje and CoolBest, are produced by Riedel. Other juice, nectar and soft drink producers include Vrumona (part of the Heineken group), Infra, Mogumogu and Hoogesteger.

Tip:

Stay up to date on the fruit juice market in the Netherlands via the website of the Dutch Association for soft drinks, mineral waters and juices (in Dutch only).

France: a leading consumer

France is the second-largest importer of pineapple juice and leading consumer in Europe. It accounted for 15% of EU pineapple juice imports by volume in 2021, amounting to 54.3 thousand tonnes and €52.8 million in value. Domestic consumption was estimated at around 49.9 thousand tonnes in 2021, meaning about 4.4 thousand tonnes were re-exported to other countries. This is up from 39.8 thousand tonnes in 2017 and comes to an average consumption growth of 6% per year. Between 2017 and 2021, French imports of pineapple juice increased by on average 4.9% per year in volume and 2% in value.

In 2021, the leading suppliers of pineapple juice to France were transit countries: the Netherlands (38% volume share), Germany (23%), Costa Rica (13%) Spain (8%), Belgium (5%), Ivory Coast (3%) and Italy (3%). The Netherlands' import share has remained relatively unchanged in the past five years, as has Costa Rica's. However, imports from Germany have been growing at a rate of 10% per year, and some emerging countries, such as Ivory Coast and Togo, have been growing at much higher rates.

As elsewhere in Europe, consumer concerns about the high sugar content of juices have negatively impacted market growth in France. Demand for organic and low-calorie juices is strong in France. To meet this demand, French producers are innovating with the introduction of 'lighter' juices, such as Pressade's organic nectars with no added sugar. Other companies are mixing juices with coconut water (such as Joker) or with milk and water (Danao). In 2020, retail sales and at-home consumption were higher than out-of-home consumption due to COVID-19.

An estimated 45% of fruit juices and nectars on the French market are packed as private labels for retail chains. The leading retail chains include Carrefour (Carrefour, Carrefour Extra and Carrefour Bio labels), E.Leclerc (Jafaden and Bio Village labels), Intermarché (Paquito label), Auchan (Auchan and Auchan bio labels) and Super U (U label). Private labels are often packed by European bottlers such as Refresco. The leading independent juice brand in France is Tropicana, followed by Joker (Eckes Grannini).

Tips:

Find French juice processing, bottling and trading companies among members of the French Juice Association (UNIJUS).

If you are not from a French-speaking country, consider investing in French-speaking staff to more easily penetrate the French market with your pineapple juice.

Germany: the second-largest consumer and a major re-exporter

Germany is the third-largest importer of pineapple juice in Europe, accounting for 12% of total European imports. Between 2017 and 2021, its imports increased by on average 1% annually in volume while decreasing 2.5% in value. In 2021, German imports of pineapple juice reached 43.1 thousand tonnes, with a value of €37.8 million. Germany is one of the major trading hubs in Europe and re-exports almost 40% of its pineapple juice imports. However, it is still the second-largest consumer of pineapple juice in Europe, after France. In 2021, pineapple juice consumption in Germany came to 26 thousand tonnes, down from 29 thousand tonnes in 2017.

Germany sources almost all of its pineapple juice from other European countries, especially the Netherlands. In 2021, the Netherlands accounted for 93% of Germany's imports by volume, followed by Austria (4%) and Belgium (2%). These shares have remained largely stable over the past five years. After import, most tropical juices are diluted, processed and packed.

Although domestic consumption of pineapple juice is decreasing in Germany, the market remains largely stable thanks to re-export trade. The drop in consumption is due to consumer concerns about the high sugar content of juices. The German Juice Association has responded with an educational campaign stressing that juices are 100% fruit and additives are not allowed. Pineapple juice is increasingly being used in juice mixes, with the addition of vitamins to make 'multivitamin juices'. It is also an ingredient in smoothies, functional drinks, flavoured waters and various juice cleanses and diets, such as the Pamela Pine mix by Kale and Me, which contains pineapple juice alongside apple, cucumber, lemon and mint. Germany is the second-largest consumer of smoothies and the largest organic market in Europe, making organic juices especially attractive.

Entering the German juice market is difficult as imports are dominated by a few large industrial suppliers that source from other European countries. Though there are more than 300 juice bottlers in the country, most do not import raw materials directly but are supplied through big traders such as Döhler and Austrian companies with facilities in Germany, such as Agrana and Grünewald (Ernteband Fruchtsaft). Other industry suppliers include Carriere, Johs.Thoms, Saprex and Juice Trade.

More than 40% of juices and nectars in Germany are sold as private labels by leading retail chains, including Solevita (by Lidl), Sooniger (Aldi Nord), rio d'oro (Aldi Süd), Rewe Beste Wahl and Ja (Rewe) and Edeka/Edeka Bio (Edeka). Most retail chains also offer organic or bio private labels, but most organic juices are sold through specialised organic retailers such as Denn's, Alnatura, Basic, Bio Company, ebl-Naturkost and Super Biomarkt. Leading bottlers of own brands in Germany are Valensina, Eckes Granini (Hohes C and Granini brands) and Pepsico (Punica soft drink brand). The leading smoothie brands in Germany are TrueFruits and Innocent.

Tips:

- Find German pineapple juice traders in the German company directory Wer Liefert Was.
- Stay up to date on the German fruit juice industry via the website of the Association of German Fruit Juice Industry (in German only).

Spain: an attractive market for tropical juices

Spain is the fourth-biggest importer of pineapple juice in Europe, accounting for 11% of total European imports by volume. Between 2017 and 2021, annual growth averaged 3.6% in volume and 2.2% in value. In 2021, Spanish pineapple juice imports came to 42.3 thousand tonnes, equal to €43.5 million. Spain is only slightly behind Germany in its volume of imports and ahead in import value, indicating a better import price. If current growth trends continue, Spain will overtake Germany in 2023 to become the third-largest European importer of pineapple juice.

Like Germany, Spain is a major re-exporter of pineapple juice, re-exporting 44% of its imports to other countries, mainly France, Morocco, the UK and Saudi Arabia. Spain is the third-largest consumer of pineapple juice in Europe, with consumption at 23.7 thousand tonnes in 2021. Over the past five years, pineapple juice consumption has been declining in Spain at an average annual rate of 4%.
In 2021, the leading supplier of pineapple juice to Spain was Costa Rica, with a 59% share of imports, followed

by transit country the Netherlands (15%), then Thailand (8%), Indonesia (4%), Brazil (3%), South Africa (3%), Kenya (3%) and the Philippines (2%). Imports from Costa Rica and the Netherland have both increased by 3% in the past five years, and from Brazil and South Africa by 2% each, while imports from Thailand declined by 8%.

Spain is an attractive market for tropical juices, including pineapple juice. Private labels account for around 40% of Spanish retail sales of tropical juices. The leading private labels in Spain include Hacendado (Mercadona), Carrefour/Carrefour BIO (Carrefour), Dia (Dia), Solevita (Lidl) and Eroski (Eroski). The two largest bottlers for private labels are J. Garcia Carrión and AMC. The main juice brands in Spain are Don Simon (J. Garcia Carrión) and Juver (Conserve Italia). Ingredient traders include Universal Iberland, Altex and Quirante Fruits.

Tip:

Learn more about the Spanish juice sector on the website of the Spanish Association of Juice Producers (AZOZUMOS) (in Spanish only).

Belgium: a growing market

Belgium is the fifth-biggest importer of pineapple juice in Europe, accounting for 10% of total European pineapple juice imports by volume. Between 2017 and 2021, Belgian imports increased by on average 6.3% per year in volume and 1% in value, indicating a declining import price. In 2021, the volume of pineapple juice imports was 36.6 thousand tonnes, with a value of €23.1 million. Belgium is a major re-exporter of pineapple juice, with an export value of 21.7 thousand tonnes in 2021. Its main re-export destinations are the Netherlands, the UK and France

Belgium is the fourth-largest consumer of pineapple juice in Europe. In 2021, its pineapple juice consumption was 14.8 thousand tonnes, up from 4.4 thousand tonnes in 2017, making Belgium the fastest-growing consumer of pineapple juice in Europe (36% average annual growth in the 2017-2021 period). The leading pineapple juice suppliers to Belgium include Costa Rica, with a 40% share, followed by transit countries Italy (27%), the Netherlands (24%), Germany (5%) and France (4%). Over the past five years, Italy grew from a 1% import share to 27%, while Costa Rica’s import shared declined by 29%.

Tip:

Learn more about the Belgian juice sector on the website of the Belgian Association of Manufacturers, Bottlers and Importers of Fruit Juices, Vegetable Juices and Nectars (AJUNEC).

The United Kingdom: an innovative market

The United Kingdom (UK) is the sixth-largest importer of pineapple juice in Europe, with an import volume of 22.2 thousand tonnes and import value of €25.4 million in 2021. Between 2017 and 2021, UK pineapple juice imports increased by on average 0.4% per year in value and 1.1% in volume, indicating declining import prices. In 2020, the UK’s apparent consumption of pineapple juice was 28 thousand tonnes, up from 19.4 thousand tonnes in 2017. This represents a yearly average growth of 13%. Data for 2021 consumption is not available.

The leading suppliers to the UK in 2021 were transit countries: the Netherlands (39% share), Ireland (13%), Spain (10%), Belgium (6%), Germany (2%) and France (1%). Together, these transit countries accounted for over 70% of pineapple juice exports to the UK. Producing countries that imported to the UK include Costa Rica

(19% share), Thailand (5%), Indonesia (4%) and the Philippines (1%). In the past five years, the import shares of both transit countries and producer countries have remained largely unchanged.

Due to consumer concerns about sugar, UK consumption of pineapple juice and juices in general decreased between 2018 and 2019, but increased again in 2020, possibly as a result of COVID-19 stay-at-home measures. Opportunities for emerging suppliers include selling pineapple juice as an ingredient to beverage manufacturers. British beverage producers are very innovative, experimenting with new and healthy options in smoothies, juice shots, functional drinks (with vitamins, amino acids, kombucha, aloe and cannabidiol). Fairtrade-certified juices provide another opportunity on the British market. The UK is the largest fair-trade and smoothie market in Europe.

In the UK, private labels hold more than 50% of the juice market. The leading UK retailers are Tesco, Sainsbury's, Morrison, ASDA and Aldi. The leading independent brands are Tropicana and Innocent. Refresco is a major direct juice importer and has six bottling and blending factories in the country. It bottles the vast majority of juices, nectars and soft drinks for private labels in the UK, as well as brands such as Innocent, Ocean Spray, Del Monte and Um Bongo. Leading suppliers of tropical juices as ingredients include Symrise, Kenegrade and Gerald McDonald & Company.

Tip:

- Learn more about the fruit juice market in the United Kingdom on the website of the British Soft Drink Association.

4. Which trends offer opportunities on the pineapple juice market?

Top trends influencing the processed fruit juice business in Europe in recent years were sustainability, especially in terms of waste reduction, changing consumer preference for more individualised and better diets, food safety, transparency and convenience. Exporters from developing countries will have more opportunities if they invest in sustainable production and partner with European clients to develop and promote healthy and sustainable products.

Pineapple is one of the top five flavours in many European countries, including Spain, France, the United Kingdom, Malta, the Netherlands, Germany and Cyprus, where demand for organic pineapple juice is increasing. Cold-pressed juice is another growing trend in the global juice business. Cold-pressing is a unique processing method believed to preserve both flavour and micronutrients such as vitamins and minerals.

Sustainability to shape the future of the European market

Environmental threats have made sustainability one of the most critical issues around the globe. To accelerate the green energy transition, the European Union has set up schemes such as the European Green Deal, which includes the Farm to Fork Strategy and Biodiversity Strategy, to make it the first climate-neutral continent by 2050. The European Union plans to help developing countries shift to more sustainable food systems and a sustainability section will be incorporated in all EU bilateral trade agreements.

One of the strongest trends in the food and beverage sector, including in the juice sector, is sustainable packaging. The European Farm to Fork Strategy strives to achieve sustainable food distribution through expanded use of sustainable food-contact materials. Beverage cartons, steel, aluminium, glass and bioplastic packaging are among the new packaging categories offered in European juice markets. Several European laws have been enacted to ban the use of non-recyclable materials, including plastics, with the following provisions:

- From July 2021, polystyrene has been banned from the EU market as a material for food and beverage packaging.
- From April 2022, a new tax applies in the UK to plastic packaging not made from at least 30% recycled plastic.
- By 2024, all beverage bottles under three litres must be closed by tethered caps. Tethered caps are caps that remain connected to the bottle after opening.
- By 2025, PET beverage bottles must contain at least 25% recycled plastic.
- By 2030, all bottles in the EU must contain at least 30% recycled material.

Many juice processors in Europe have set their own sustainability goals, including making operations more sustainable by putting pressure on raw material suppliers. Examples include prioritising suppliers that use bioethanol and bioplastics over those that use fossil fuels.

Emergence of low-calorie and functional drinks

Young European consumers, in particular, want functional advantages from juice. Young consumers are concerned about losing weight, boosting energy and improving skin condition. Functional claims about bone, muscle and heart health are important to both physically active and elderly consumers. Seniors are one of the fastest-growing adult populations and an especially strong market for adult-focused juice flavours.

Consolidation in the juice industry

Mergers and acquisitions, as well as production centralisation and expansion, are changing the European fruit and tropical juice industry. Some examples are:

- Expansion of product lines: Del Monte® expanded its presence in Iceland supermarkets in October 2021 with a new and extensive range of Not From Concentrate (NFC) juices. Del Monte® Juices was available in all Iceland Foods and The Food Warehouse shops by the end of October 2021. This followed the success of the Del Monte® Frozen Fruits collection, a chilled juice line that debuted in May 2021 with Pure Orange Juice, Pressed Pineapple Juice and Pressed Apple & Mango Juice. This replaced Iceland's own existing label of chilled juice products.
- In 2021, PepsiCo announced an agreement to sell Tropicana, Naked and other North American juice brands to PAI, a French private equity group. Under the agreement, PAI also has a permanent option to buy specific Pepsi juice companies in Europe.

Decline in import volume likely to raise prices

- According to Zenith Global's globaldrinks.com database, while overall demand for healthy beverages increased over the past five years, the total volume of fruit juice sales has steadily declined in both North America and Western Europe. However, price increases are still propping up revenue figures.
- Due to bad weather in Florida, Brazil, Indonesia and Thailand, European imports of oranges and pineapples are projected to decrease. Harsh weather and a weak euro have caused the price of some fruit juice concentrates to rise. This may open up prospects for new suppliers from developing countries to enter the market at a competitive price.
- Thailand is Europe's second-largest supplier of pineapple juice. Due to the low price of fresh pineapples, many Thai farmers have shifted to other crops and neglected their pineapple plantations, resulting in a 38% decline in Thai imports in the past five years. At the moment, there is a global pineapple shortage, so pineapple juice prices are projected to rise.

Tips:

To learn more about the European market for fruit juices, read the CBI study about Trends for processed fruit and vegetables.

New product segments that use fruit juices as components, such as smoothies, juice diets and juice shots, present opportunities for emerging producers.

Consider selling organic, fairtrade and NFC juices to gain an advantage in the market.

This study was carried out on behalf of CBI by M-Brain.

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