REPORT OVERVIEW

The South African Fruit Juice Landscape Report (126 pages) provides a dynamic synthesis of industry research, examining the local and global Fruit Juice industry from a uniquely holistic perspective, with detailed insights into the entire value chain – from manufacturing, retailing and pricing to consumption trends.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Fruit Juice Industry Section:
- What are the current market dynamics of the Global Fruit Juice industry?
- What are the Global Fruit Juice industry trends, drivers, and restraints?

For the South African Fruit Juice Industry Section:
- What are the current market dynamics (leading governing body, production, exports) of the SA Fruit Juice industry?
- Who are the key manufacturing players in the SA Fruit Juice industry?
- What are the South African industry trends, drivers and challenges?

For the South African Retail and Pricing Analysis Section:
- Who are the key retail players (retail outlets, independents and supermarkets) in the SA Fruit Juice industry?
- What are the prices of Fruit Juices (concentrates and ready-to-drink) across SA retail outlets?

In terms of South African Consumer Insights and Trends:
- What are the statistical consumption trends of Fruit Juice concentrates and ready-to-drink Fruit/Vegetable Juice in South Africa (2012-2015) and forecasts (2016-2019)?
- What are the statistics regarding gender, age, life stages, LSM, home language, province and population profile for Fruit Juice concentrates and ready-to-drink Fruit/Vegetable Juice household purchasers?
SCRENSHOTS FROM REPORT

126 page report filled with detailed charts, graphs, tables and insights
Fruit Juices and their flavours are popular and highly favoured in virtually every region of the world. Fruit concentrates have applications across various industries and products.

- Fruit Juice is produced from liquid concentrate, powder concentrate, puree concentrate, clear concentrate and frozen concentrate. Among all these segments, the liquid concentrate comprises of the major market share, followed by the powder concentrate.

- The liquid concentrate is also called Juice concentrate with its most prominent application being in the beverage industry in reconstituted Fruit Juice.

- The clear concentrate is expected to show a significant growth during the forecast period leading up to 2020.

The graph below illustrates the current and projected revenue on the global Fruit Juice market with current revenue from 2010-2016 and projections for 2018 and 2020.

**CURRENT AND PROJECTED REVENUE IN THE GLOBAL FRUIT JUICE SEGMENT (2010-2020)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Orange Juice</th>
<th>Apple Juice</th>
<th>Grape Juice</th>
<th>Grapefruit Juice</th>
<th>Pineapple Juice</th>
<th>Other Juices</th>
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<td>2014</td>
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<td>2016</td>
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<td>4,592</td>
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<td>5,181</td>
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<td>2018*</td>
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Note: The asterisk (*) shows the forecasts for 2018 and 2020.

Source: Mordor Intelligence

Image source: Freepik; Pexels
The Fruit Juice market in South Africa is impacted by a number of potential trends (including health trends) that are similar to what is proving popular and/or successful on a global scale.

- **Growing middle class**: The middle class continues to grow and the focus is on health and wellness products to assist in a better quality of life. Consumers worldwide overwhelmingly see 100% Juice as healthy, natural and tasty and the shift to all natural Juice products is most pronounced in several emerging markets, including Africa.

- **Premiumisation and “All natural” as a rising trend**: The strongest growth in the Fruit Juice category is at the highest end. Consumers are particularly prepared to pay more for natural products that promote good health. There is a clear shift towards products that the consumer sees as natural, evident in NFC 100% Juice gaining share over reconstituted despite its higher price.

- **Vegetable nutrition**: As a result of the sugar tax threatening the Fruit Juice industry and beverage industry as a whole, vegetable drinks are becoming increasingly popular. Vegetable drinks are blended with Juice to lower the natural sugar content and add health benefits. This could be a potential solution to the sugar tax threat.

- **Increased need for on-the-go consumption**: Changing lifestyles are challenging traditional consumption occasions, notably breakfast: Demand for on-the-go consumption, snacking and social Juice occasions all create alternative opportunities for consumption out of home such as healthy fruit beverages which promise your “5-a-day”.

Source: Tetrapak

Image Source: Pixabay
Clover was named as one of South Africa’s favourite brands during the 2016 Sunday Times Top Brands Awards.

- Clover also claimed top spot in the Reputation Institute’s study of the most reputable companies in South Africa in 2016.

- During the 2016 Innovation Awards, Tropika Long Life won, for the first time, a “Product of the Year” award.

- 2016 was a good year for Clover in other ways as well: headline earnings increased by 11.7% or R37.3 million to R356.6 million. Headline earnings per share improved by 8.9% (15.3 cents), or 2.8% less than headline earnings due to equity share appreciation rights settled during the year.

- The contribution to overall margin on material (MOM) of non-alcoholic beverages, fermented products and desserts, and other value-add products, increased from 35% in the 2014/15 financial year to 40% during 2016.

- In 2016, Clover spent R30.6 million or 13% less on advertising, marketing, research and development costs compared to 2015, by leveraging synergies through a “mother brand” approach.

- Administrative expenses were consequently reduced by 2.8% or R8.5 million in 2016.

Source: Clover Integrated Annual Report 2016
## SAMPLE FROM REPORT:
**PRICING ANALYSIS: READY-TO-DRINK**

<table>
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<th>250ml</th>
<th>5L</th>
<th>200ml</th>
<th>1L</th>
<th>5L</th>
<th>275ml</th>
<th>330ml</th>
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This pricing analysis was conducted at retail stores and supermarkets during w/c 10 April 2017
In 2015, 27% of people that consumed Fruit Juice Concentrates in the past 7 days were aged from 15-24, compared to 23% that were 50 years and older.

In relative terms, a higher percentage of people aged 15-24 and 25-34 have drunk Fruit Juice Concentrates or Ready-to-Drink Fruit Vegetable Juices than people aged 35+ years.

Source: AMPS 2015
Sample Size: 14,158 (Fruit Juice Concentrates); 11,423 (Ready-to-Drink Fruit/Vegetable Juice)
Based on weighted numbers
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✓ Customer interviews
✓ Company website analysis
✓ Governmental held records
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