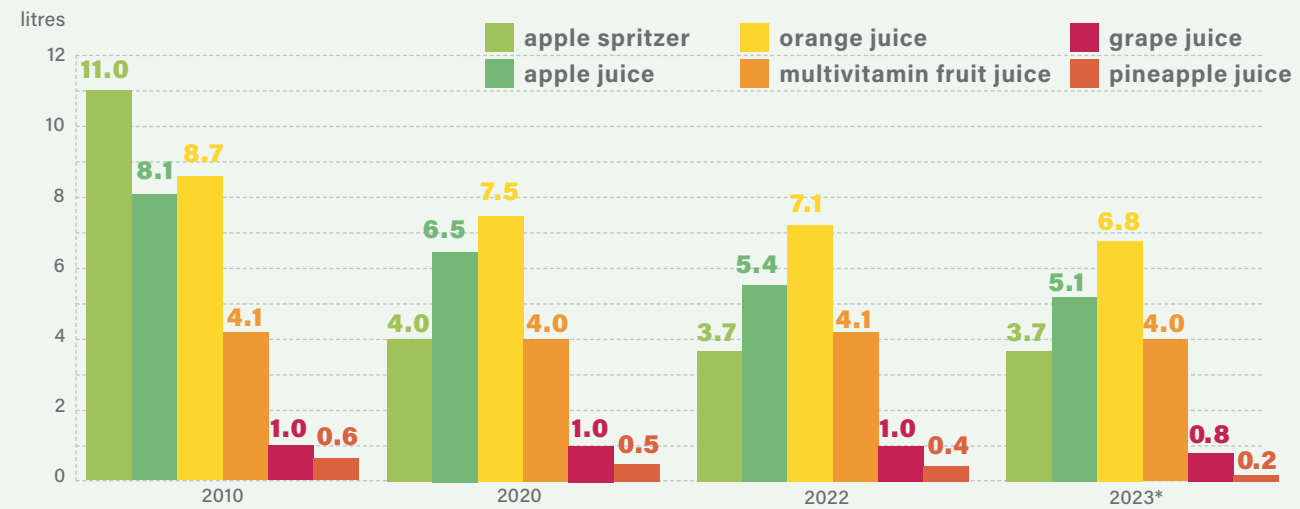


THE MOST POPULAR FRUIT JUICES AND APPLE SPRITZER/SCHORLE

Development of the per-capita-consumption in Germany (in litres)

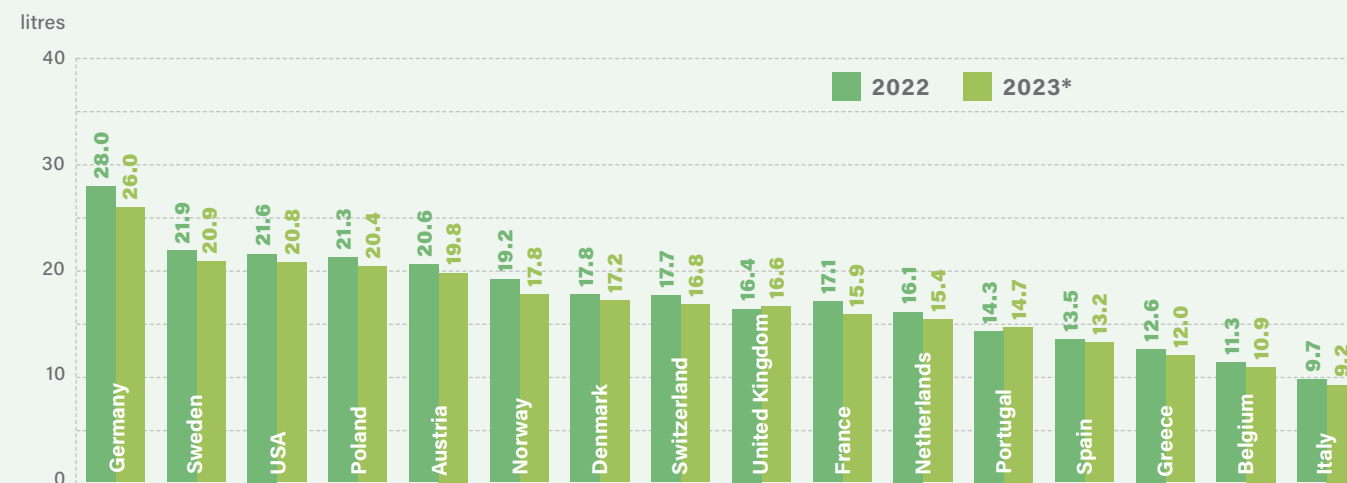


Source: Verband der deutschen Fruchtsaft-Industrie e. V. (VdF), Bonn

* provisional values

FRUIT JUICE CONSUMPTION IN A COUNTRY COMPARISON

Per-capita-consumption of fruit juices and nectars 2022/2023* in litres



Source: Verband der deutschen Fruchtsaft-Industrie e. V. (VdF), Bonn; GlobalData Plc, London

*provisional values

THE ASSOCIATION OF THE GERMAN FRUIT JUICE INDUSTRY (VdF)

The VdF is the federal association of fruit juice/nectar and vegetable juice/nectar producers in Germany. It represents the common interests of its members both nationally and internationally towards public authorities, institutions and associations. It informs its members in all technical and legal matters related to the fruit juice and beverage industry. The aim of VdF's work in the European Fruit Juice Association (AIJN) in Brussels and the International Federation of Fruit Juice Producers (IFU) in Paris is to ensure the high quality of fruit juices and fruit nectars – in the interest of the consumer and fair competition.

The members and the Executive Committee can trust on the professional competence and market knowledge of their expert committees for

- technology, environment and research
- legislation, competition and food science
- SME policy, business management and tax issues
- public relations

Through the work and reporting of these expert committees, a continuous exchange of views is given and a consumer-orientated development of the industry is ensured.

Foundation of the association:

17th January 1951

Members:

There are 305 fruit juice producers organised in the VdF. 183 direct members and 122 small companies are supported by 4 regional associations, which in turn belong to the VdF.

President:

Klaus-Jürgen Philipp

Managing Director:

Klaus Heitlinger (Master of Agricultural Science)

Imprint

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German Fruit Juice Industry

FACTS & FIGURES 2023



WHO'S WHO ON THE JUICE SHELVES?

Fruit juice

Fruit juice consists entirely of "liquid fruit". It basically contains neither colourings nor preservatives. There are direct juices and fruit juices made from fruit juice concentrate. Direct juice is filtered as it is obtained from the fruit and bottled or stored for later bottling. In order to obtain concentrated fruit juice, the water is extracted from the freshly squeezed juice under a vacuum. When reconstituted with water, the fruit juice is completely on a par with directly bottled fruit juice. It also contains 100 percent fruit.

Per-capita-consumption of fruit juices in Germany in 2023 was 18.2 litres (2022: 19.5 litres).

Fruit nectar

Some fruits, such as blackcurrants, sour cherries or bananas have so much fruit acid or pulp by nature that they cannot be offered as a fruit juice, but in the form of fruit nectar. Fruit nectar produced from these fruits has a prescribed minimum fruit content of between 25 and 50 percent, depending on the type of fruit. Fruit nectars are also free from colourings and preservatives.

Per-capita-consumption of fruit nectars in Germany in 2023 was 7.8 litres (2022: 8.5 litres).

Fruit juice drinks

In the case of fruit juice drinks, the fruits usually only provide the taste. The minimum fruit content is, depending on the type of fruit, around 6 to 30 percent. 'Fruchtsaftschorlen' enjoy a special status; they are made from fruit juice and mineral water. The initial product – fruit juice – is subject to the same regulations as 100 percent fruit juice. Apple spritzer, for example, has a fruit content of at least 50, but mostly 60 percent.

Per-capita-consumption of still fruit juice drinks in Germany in 2023 was approx. 8.3 litres (2022: 8.6 litres).

Per-capita-consumption of "Fruchtsaftschorlen" (carbonated fruit juice mixed with mineral water) in Germany in 2023 was approx. 3.7 litres (2022: 3.7 litres).

THE GERMAN FRUIT JUICE INDUSTRY IN FIGURES FISCAL YEAR 2023*

fruit juice producers

305



approx. **7,500** Employees

Turnover



Industrial production

fruit and vegetable juices
fruit and vegetable nectars
fruit juice drinks without CO₂ **2.85** billion litres

Per-capita-consumption

fruit juice
fruit nectar
vegetable juice
vegetable nectar



Per-capita-consumption
Apple spritzer



approx. **600,000** tons

Fruit and vegetable processing



Imports **1.64** billion EUR



Exports **1.33** billion EUR

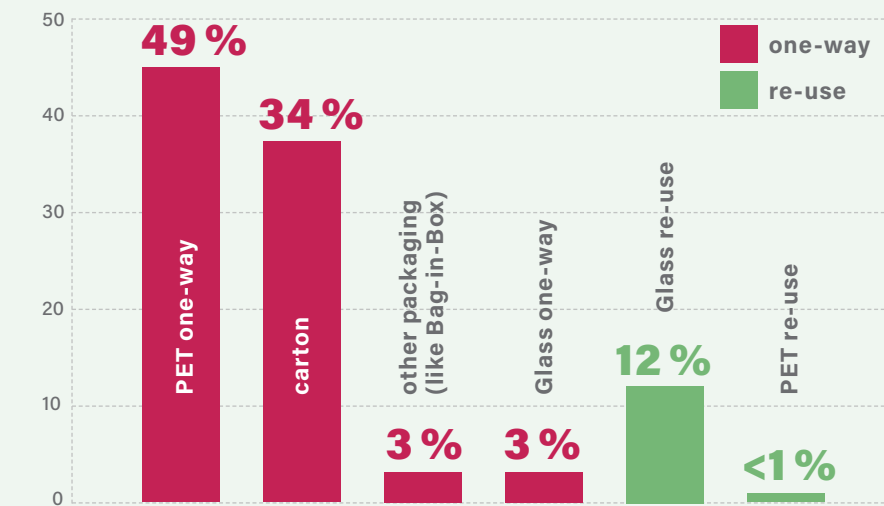
Source: Verband der deutschen Fruchtsaft-Industrie e. V. (VdF), Bonn
*provisional values

REGIONAL DISTRIBUTION OF THE FRUIT JUICE PRODUCERS

Area	Number of companies ¹		Turnover in m. €	
	2023*	2022	2023*	2022
Baden-Württemberg	43	43	421	407
Bavaria	17	17	160	159
Brandenburg/Berlin	13	13	60	50
Hesse	10	10	152	115
Mecklenburg-Western Pomerania	3	3	239	216
North	21	21	475	475
North Rhine-Westphalia	24	24	710	733
Rhineland-Palatinate/Saarland	21	22	1,092	1,066
Saxony	6	6	12	13
Saxony-Anhalt	5	5	23	20
Thuringia	2	3	3	3
Total	165	167	3,347	3,257

¹Members VdF without affiliated / foreign members and without the 122 members of the regional associations
Source: Verband der deutschen Fruchtsaft-Industrie e. V. (VdF), Bonn
*provisional values

PACKAGING STRUCTURE 2023* fruit juices/-nectars and vegetable juices/-nectars



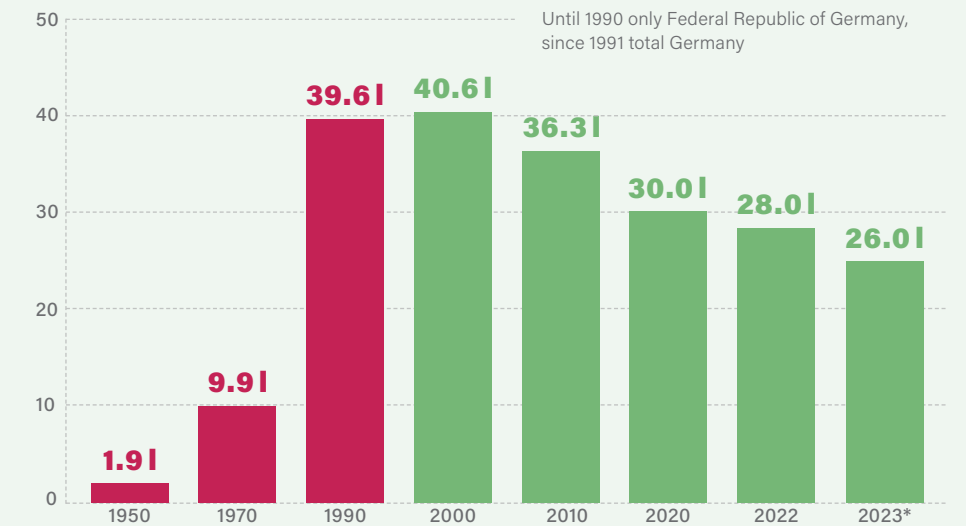
Source: Gesellschaft für Verpackungsmarktforschung (GVM)
*provisional values

STRUCTURE OF THE GERMAN FRUIT JUICE INDUSTRY

Turnover in m. €	Number of companies ¹ 2023 (2022)	percent	Total turnover 2023 in m. €* 2023	percent
up to 0.26	48 (54)	29.1%	4	0.1%
from 0.26 to 0.50	22 (19)	13.3%	8	0.2%
from 0.50 to 1.00	15 (15)	9.1%	11	0.3%
from 1.00 to 2.00	23 (21)	13.9%	36	1.1%
from 2.00 to 5.00	21 (23)	12.7%	60	1.8%
from 5.00 to 10.00	5 (4)	3.0%	32	1.0%
from 10.00 to 25.00	9 (9)	5.5%	142	4.3%
from 25.00 to 50.00	8 (8)	4.8%	297	8.9%
from 50.00 to 100.00	5 (7)	3.0%	302	9.0%
from 100.00	9 (7)	5.5%	2,455	73.4%
Total	165	100%	3,347	100%

¹Members VdF without affiliated / foreign members and without the 122 members of the regional associations
Source: Verband der deutschen Fruchtsaft-Industrie e. V. (VdF), Bonn
*provisional values

DEVELOPMENT OF PER-CAPITA-CONSUMPTION OF FRUIT JUICES/FRUIT NECTARS IN GERMANY



Source: Verband der deutschen Fruchtsaft-Industrie e. V. (VdF), Bonn
*provisional values