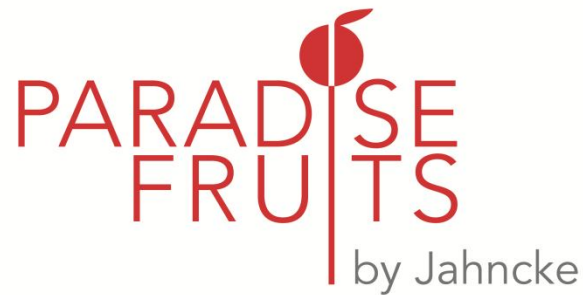


Fruit: A Surge in Applications



Sponsored by Paradise Fruits

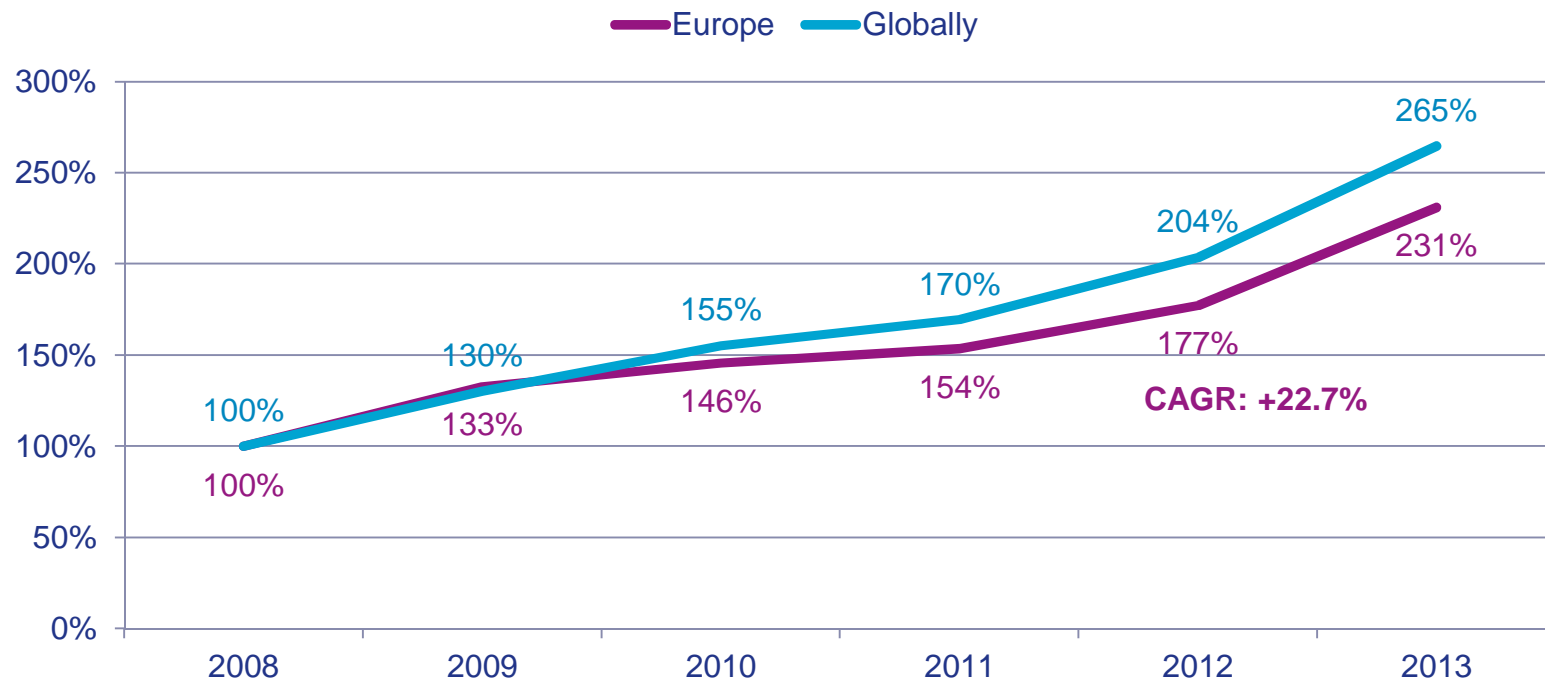
March 2014



Fruit ingredients remain popular

- Fruit ingredients in product launches tracked have shown a healthy growth rate in Europe, +22.0%.
- In 2013, the penetration* of fruit ingredients was 27%.

Development of fruit ingredient launches in Europe



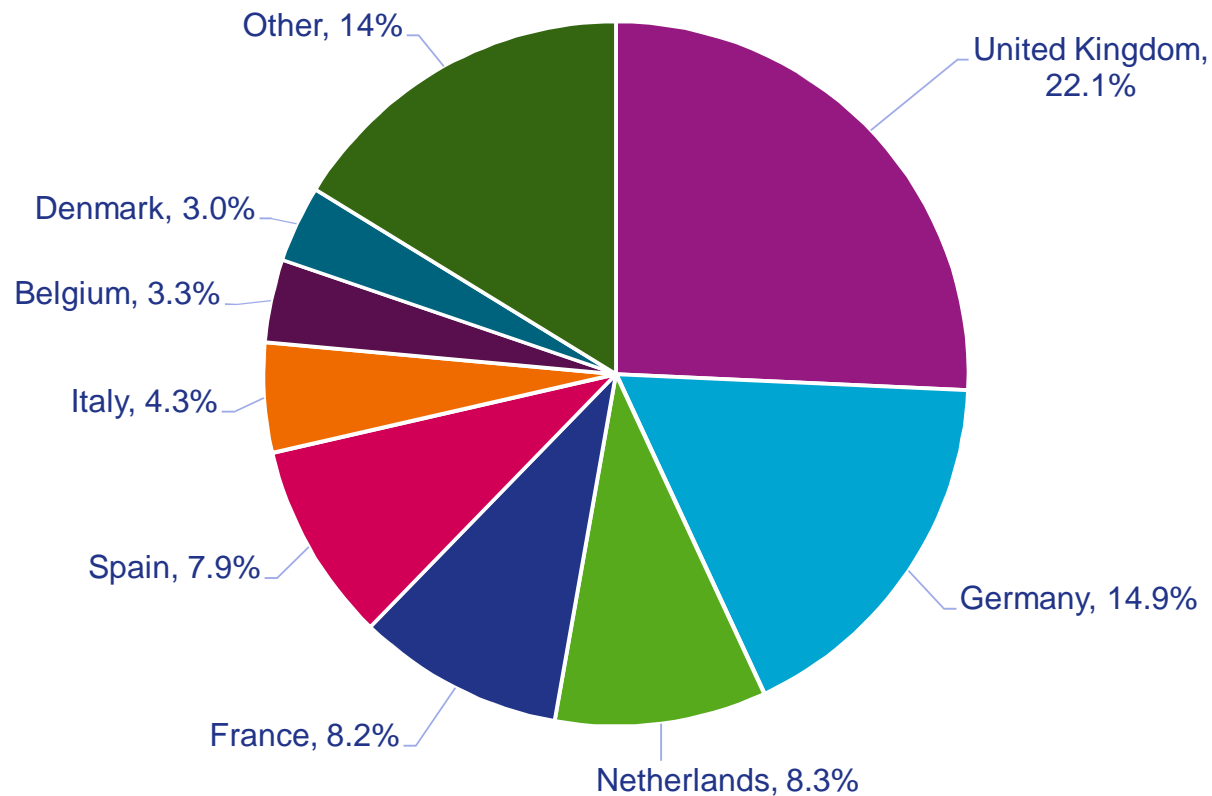
2008 = 100%

*percentage of new products with fruit ingredients among all product launches tracked.

Top regional distribution of fruit ingredients in Europe

- The United Kingdom (24.9%) sees almost a quarter of all new product launches tracked with fruit ingredients in Western Europe.

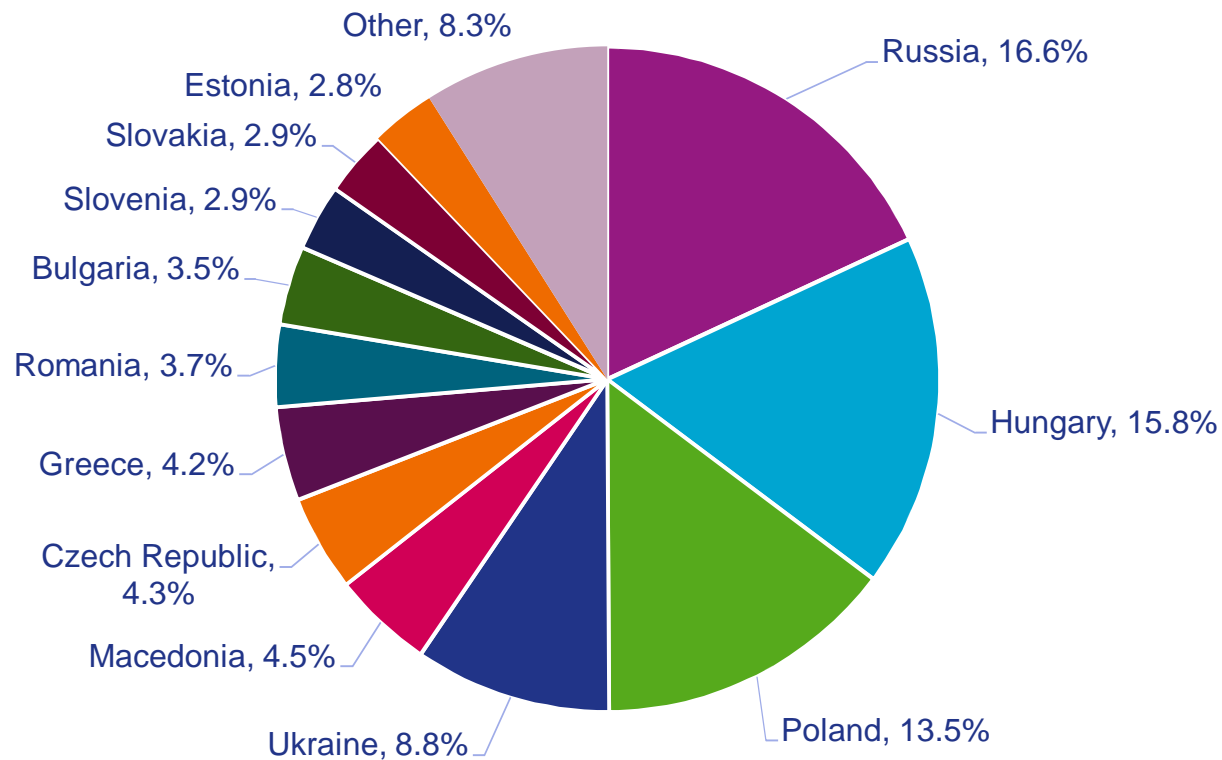
Product launch share of products tracked with fruit ingredients
- Western Europe (2013)



Top regional distribution of fruit ingredients in Europe

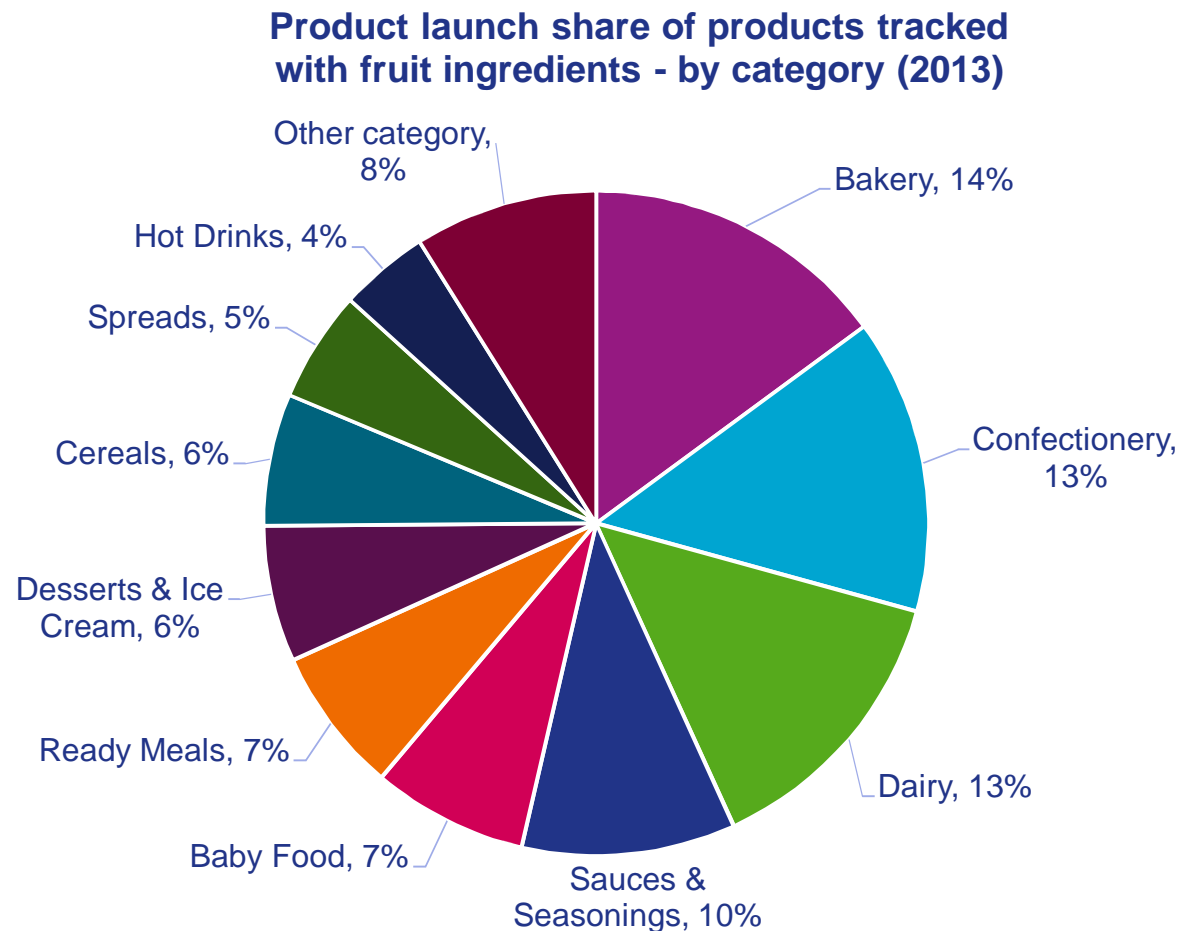
- Russia (16.6%), Hungary (15.8%) and Poland (13.5%) together see over half of all the product launches tracked with fruit ingredients in Eastern Europe.

Product launch share of products tracked with fruit ingredients
- Eastern Europe (2013)



Top category distribution of fruit ingredients in Europe

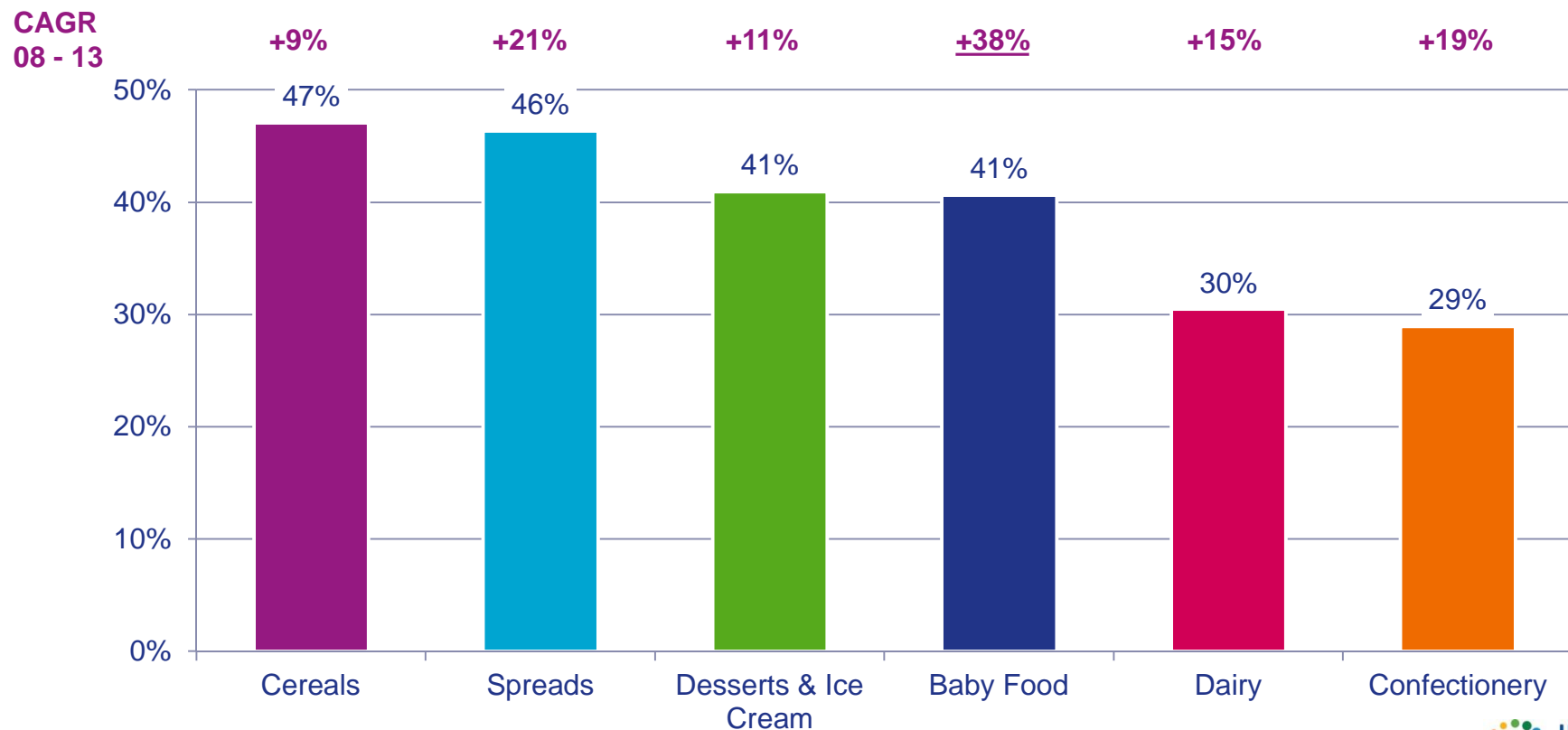
- The categories with the most product launches tracked with fruit ingredients in 2013 are dairy (13.2%), confectionery (12.7%) and bakery (12.1%).



Top categories of fruit ingredients based on 2013

- 47% of all cereal product launches tracked, contain fruit as an ingredient.
- The highest average annual growth rate (CAGR) from 2008 to 2013 is tracked for baby food: +38%.

Product launch share of products tracked with fruit ingredients - by category (2013)



Product examples with fruit ingredients in Europe

Fruit Snack for Babies



FruchtBar (Germany, Jan 2014)

Description: 100% organic fruit crispies featuring orange, carrots, apple and mango. The product provides an innovative vege+fruit+grains combination. The product is also organic and contains no added sugar.

Confectionery



Katjes Grün-Ohr Hase: Marshmallows with Fruit Gummies (Germany, Jul 2013)

Marshmallows with fruit gummies in a plastic bag.

Ingredients: Apple, elderberry

Bakery



Iglo Cocoa Germknödel with sour heart (Austria, Dec 2013)

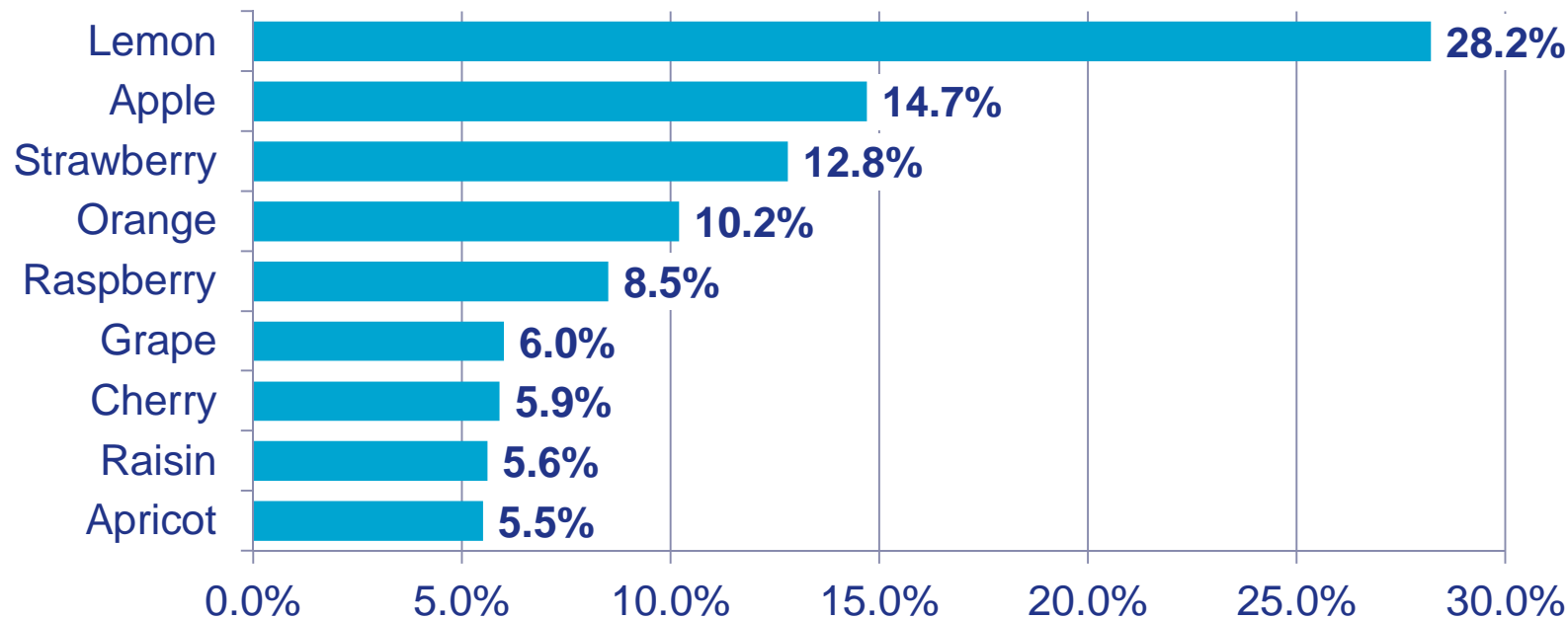
cocoa yeast dough with a fruity-fresh Vistula heart and crispy cocoa crumbs

Ingredients: Apricot

Top fruit types used as ingredients in Europe

- For European product launches tracked with fruit ingredients, lemon is present in 27.4%. This means 1 out of 4 products with fruit as ingredient contains lemon.
- Apple is in a distant second place compared to lemon: +14.7%.
- Grape shows the highest average annual growth rate from 2008 to 2013: +24%, compared to other fruit ingredients in the top 10.

Top fruit ingredients in European product launches tracked (2013)



Product examples with fruit ingredients in Europe

Lemon



Bas Bas Dezert na Bazi Zita sa Sljivom i Limunom: Wheat Dessert Bar with Plum & Lemon (Serbia, Sep 2013)

Wheat based dessert bar with plum and lemon

Ingredients: lemon peel, natural-identical lemon flavor

Apple



Frootz Apple High Fruit Buttons (United Kingdom, Sep 2013)

Description: Five sachets of high fruit apple sweetened buttons made with apple juice, packed in a cardboard box.

Ingredients: Reconstituted fruit juice from concentrate (76%) (apple, lemon)

Strawberry



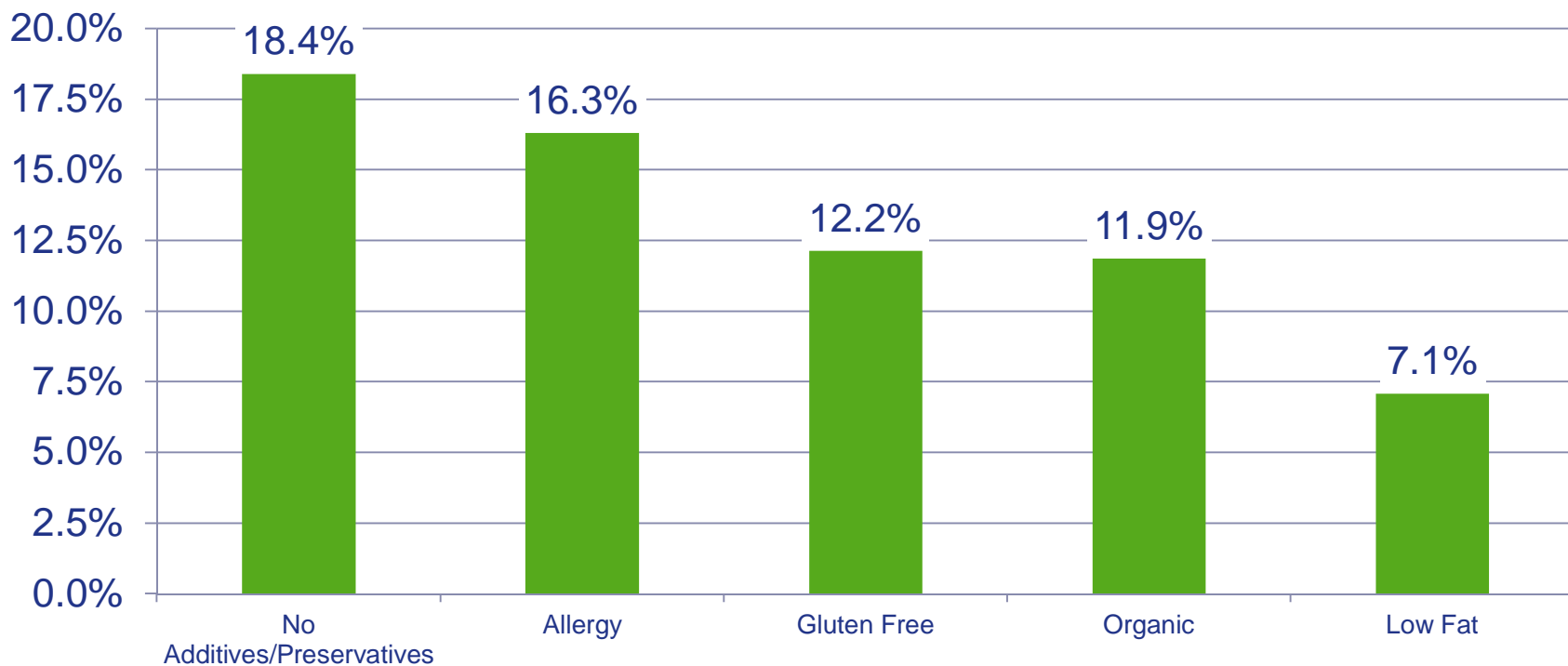
Organix Baby Food: Strawberry & Banana Porridge (United Kingdom, Mar 2014)

Ingredients: Rice flour 55%, maize flour 36%, banana flakes 6%, freeze dried strawberry powder 3%,

Top health claims

- 18.4% of products with a fruit ingredient carry a no additives/preservatives claim.
- Clean label claims (no additives/preservatives and organic) and free from claims (allergy and gluten free) dominate the top 5 passive health claims.

Top 5 passive health claims on product launched tracked with fruit ingredients in Europe (2013)



Health claims product examples in Europe

No Additives/ Preservatives



Kiddylicious Apple Crisps (Spain, Mar 2014)

Description: Four yummy bags of bite sized crunchy slices of real apple.

Claims/Features: No additives or salt. Whole portion of fruit inside each bag. 1 of your 5 a day.

Gluten/ Allergy free



Beauty Sweeties Fruit Confection: Finest Fruit Confection with 81% Fruit Content, Coenzyme Q10, Aloe Vera, Biotin (Germany, Jan 2014)

Claims/Features: 81% fruit content, coenzyme Q10, Aloe Vera and Biotin make these fruit confections unique. Gluten-free. Lactose-free. No gelatine.

Organic



Landgarten Schoko Beeren-Mix In Dreierlei Schokolade: Chocolate Berry Mix (Austria, Dec 2013)

Claims/Features: Certified organic.
Ingredients: organic blueberries 3%, organic raspberries 3%, organic strawberries 3%,



Thank you for viewing



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