

More juice in the tank

Off to new shores?

Sugar-free, low carb, fructose intolerance, gluten-free, self-optimisation - buzzwords of recent nutritional trends among millennials and Gen Z that do not speak for a comeback of juice! At the same time, regionality, homemade, "crafted", vitamin-rich, organic and vegetarian-vegan continue to gain traction - topics that are also relevant for juices. The effects of the Corona pandemic and the lockdowns with a maximisation of home consumption, home delivery, home something (...) had apparently also given juice beverages a brief interim high - permanently or temporarily?

Mith the invention of pasteurisation by Luis Pasteur around 1860, it was possible to produce

fruitjuice. The juice is not to be drunk immediately after it is pressed. Since that time, juice has had a firm place in Germany and has anchored itself as a cultural asset. Like milk, juice was the Germans' daily bread. The two world wars with their supply shortages interrupted this trend for a short time.

The golden era of juices

After the Second World War, German citizens reached the pre-war nutritional level in 1954. Southern fruits and fresh fruit played a significant role in this. Consumption in relation to the average had risen by 55 percent between 1935 and 1938. After the "intoxication of liberation", the Germans also opted for "softer" pleasures: Instead of beer and schnapps

wine and fruit juice were increasingly consumed. In the years around 1970, there was a last blossoming of an unrestrained eating and drinking culture of the wartime generation characterised by a need to catch up, before a stronger health consciousness developed in the 1980s alongside ecological awareness. An example of this was the first wave of fitness that spilled over from the USA to Germany with aerobics.

After the end of the war, juice had made snacking healthy again - as did the advertising promises of nimm2 sweets, which had jumped on the juice bandwagon in 1962 and propagated "fruit juice, vitamins and Na- schen" all in one. The fact that such claims as those made by Hohes C (Fig. 2) are no longer conceivable today is thanks to the Health Claims Regulation (HCVO). On the other hand, who doesn't think back with a smile to the advertising slogan "Milk makes tired men tired", with which the West German company "Milch macht müde Männer mun- ter".

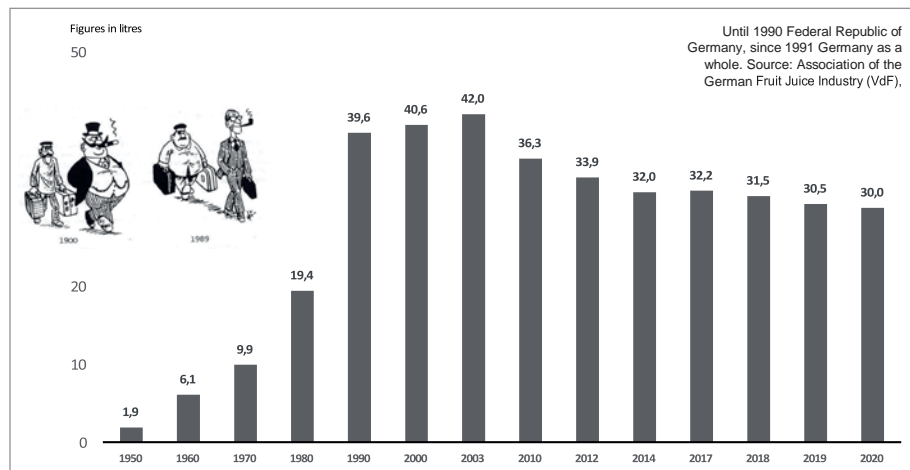
The milk industry used to beat the advertising drum for milk in the 1950s. Later, on behalf of the Centrale Marketing-Gesellschaft der deutschen Agrarwirtschaft (CMA), which was dissolved in 2009, it was shortened to: "It's the milk that does it".

During that time, juice consumption skyrocketed. The heyday of juice was in the 1990s / 2000s, when juice was seen as an easy way to get convenient vitamins. Advertising campaigns such as those of the brand Hohes C (born in 1958) certainly contributed to this, with statements such as "As much vitamin C as four pounds of oranges" and "If you care about your family's health", promoting the daily glass of juice as a "source of vitamin C for the whole family" and "A healthy diet".

"As important as daily bread" in the minds of consumers.

If we google "juice healthy" today, the first hits that appear are "Juice from fruits such as orange, pomegranate and chokeberry (Aronia) are considered to be healthy. But besides antioxidants and vitamins, fruit juice can contain as much sugar as cola" (query via Google 28 May 2021). Even though not all juices are the same, consumers are hopelessly overwhelmed when it comes to the different quality levels of juice and their consumption. Juice has clearly lost credibility and relevance as a "vitamin boost", which has contributed to significant declines in per capita consumption in the following years (Fig. 1). Despite declining consumption since the middle of the Millennial years, the Germans are still the "juice world champions" in per capita consumption with about 30 litres, followed by Norway in second place with 23.5 litres and the USA with 20.7 litres.

Fig. 1: Development of per capita consumption of fruit juices/fruit nectars in Germany in the years 1950 to 2020



The age of millennials and self-optimisers

The 2000s marked the beginning of the age of the new consumers from Millennials (Gen Y) and Gen Z: Compared to Gen X and baby boomers, disposable and plastic bottles became the "new normal" and reusable and glass were initially pushed aside. In addition to less lugging around, the self-optimisers of Gen YZ also saw a trend away from "heavy" juice drinks towards lighter, more health-conscious and sugar-reduced variants - without necessarily having to give up the pleasure of juice. This trend was already underway at the turn of the 2000s, when the familiar juice-water mixture (especially apple juice) was already available as ready-mixed spritzers.

conquer the German beverage trade ten. The "German Schorle" is once again a typical German phenomenon which, according to Wikipedia, has its origins in the 18th century and, according to a popular theory, derives from the Lower Bavarian "Schurlemurle" as the name for a mixed drink made from wine and mineral water.

The consumption of spritzers is medium

(-16.6 per cent in food retailing last year according to Nielsen, see Fig. 3). This cannot be explained solely by the corona-related omission of consumption situations in gastronomy,

but also about the demographically The decline in the number of young refreshment beverage lover and is subject to too much diversity. of drinking alternatives.

Nevertheless, individual branded products such as fritz-spritz in spritzers or segments such as non-carbonated fruit juice drinks with 6 to 30 per cent fruit content (+5.7 per cent in 2020 in food retailing according to Nielsen) as well as the "light" variants in general (calorie-reduced lemonades and fruit juice drinks with low calorie content) are benefiting. The segment of "healthy" (less sweet) soft drinks plays a central role in this context. Contrary to the general trend, these are even on the rise. With Bionade as the founder of the category, the triumphal procession of this segment has continued with other brands at the latest since the summer fairy tale of the 2006 World Cup in Germany. Even Bionade, after an interim period of thirst and finding its way around, has been able to participate again in this trend.

participate in the trend, since the young people The trend in soft drinks continues to move towards less sugar and more enjoyment, which brands like fritz, Proviant, Lemonaid



Fig. 2: Earlier advertising for juice and milk

Sources: Old Re-clame from 1966 - HIGH C - The Nature's gift of vitamins, available via www.ebay.de (3w3209/ Old advertisement from 1966 - HIGH C - The Vitamine gift of nature. eBay) Gemeinschaftswerbung Milch 1953, retrieved via BrandHistory.com (<https://brand-history.com/index.php/cma-centrale-marketing-gesellschaft-der-deutschen-agrar->

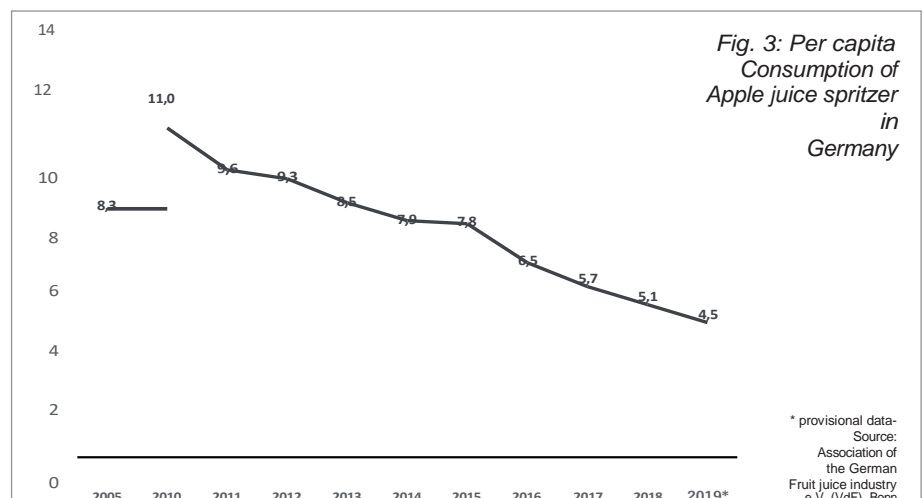


Fig. 3: Per capita Consumption of Apple juice spritzer in Germany

and organic lemonades such as Now, Happy, Ände & Co as a new generation of natural juice lemonades. These claim attributes such as 100 per cent natural ingredients, low sugar content and regional (organic) origin and are family-friendly alternatives to conventional category heroes such as "Die Limo" from Granini. In addition, these "light" products are also in line with the fitness and health urge of Gen Z, who pay increased attention to appearances and follow influencers like Pamala Reif and Sophia Thiel on Instagram & Co. Sweet sugar bombs like juice no longer fit into the worldview of this generation.

Juice brings "natural variety" and enjoyment!

The image of juice seems to have improved somewhat in the meantime. Despite a continuous decline, segments such as high-quality direct juices/premium juices are continuously gaining in importance. According to the VdF, chilled direct juices achieved an increase of 11.4 percent in 2020 and non-chilled of 5.3 percent. Here, the market with chilled direct juices from Valensina & Co. or premium juice suppliers such as Van Nahmen has also continued to develop. In the tradition of Hohes C, Germany's favourite is still orange juice (34.5 per cent).



Fig. 4:
Modern new
juice creations
that trigger
desire in Gen Z.

percent share of the total market) followed by apple juice with 27.8 percent and mul-tivitamin with 14.2 percent.

The growth in the last year points less to a renaissance of juice as a natural source of vitamins to strengthen the immune system than to the changes in lifestyle and eating habits brought about by Covid-19. In times of home offices and school closures, breakfast is being shifted back to the home and the smoothie-to-go breakfast is being replaced by a glass of healthy direct juice to accompany it at the breakfast table or in front of the computer.

In order to charge the category of juice in a sustainable way, various anchors can be used. We know from numerous psychodrama studies, for example, that regionality serves consumers as an easily decodable signal for taste, quality and sustainability, as well as for "psychological proximity" far beyond geographical relationships. The topic of regionality drives Gen YZ not only because of a psychological "Robin Hood syndrome" (desire to support regional, "small" producers), but also because of a concrete anchoring of origin and the ideal of avoiding long transport routes. Regional becomes a synonym for "originating from a certain region" and makes a product like z. For example, a Spanish Fair Trade orange juice from an agricultural cooperative is morally superior to "industrial goods". Organic certification reinforces this "reason to believe".

The "sommelier idea" has already been successfully used in other beverage categories. Varietally pure juices (as is already the case with Becker's Bester or Gerolsteiner with its varietally pure apple spritzers) offer new starting points for a more enjoyment-oriented presentation of the juice category. Juice sommeliers as ambassadors and multipliers for good taste and authentic quality can contribute to strengthening the generally positive perception of juice.

The country needs new contexts

For more juice in the (consumer) tank, new occasions and occasions are needed to make juice consumption an automatic solution. Just like back in the 1960s with the daily sip of vitamins. For Gen Z (born after 1995), however, unlike their parents' generations, access to juice is not "socialised" and thus not automatic. Rather, juices have to work out their ways to the new consumers anew: In an "Instagram generation", real and virtual worlds have merged into a self-evident unity, which presupposes the necessity of a (re)staging of products suitable for social media for products that have fallen into oblivion.

Exotic fruit mixes, for example, enrich the escapist experience. It is therefore hardly surprising that high-quality and varied juice blends and non-alcoholic cocktail pre-mixes, such as those from Granini or Voelkel, showed a plus last year. Exciting juice creations could also cause astonishment in the rather "rational" segment of vegetable juices. Ultimately, there are many possibilities for "boring" or less inviting vegetables such as sauerkraut to be transformed into innovative juice creations made from fruit and vegetables, beyond the discussion about sugar. Curiosity is definitely present in Gen Z.

Through self-optimisation and "more charm for the gut", the detox sector is also on the rise. In addition to tea, juice cures have long been popular as a home remedy. Last year's best sellers, however, were not products with the stepmotherly name "juice cure", but vitamin-rich shots based on ginger and turmeric for daily well-being and the "extra vitamin and energy boost". This is where the small start-up Kloster Kitchen (Fig. 4)

from the Hersbrucker Land region as German Innovation Award '21 Winner. Advertising slogans such as "Boost your morning routine" intuitively give consumers the context of use for the shots, and the "valuable knowledge about a traditional recipe from the toilet kitchen" is successful storytelling.

Contextual concepts, such as those used by von Beckers Bester (Fig. 4) and the Rot-bäckchen brand - two of the success stories of the juice industry in recent years. Of course, the eye is always part of the drink: no successful juice without an appealing container! Long-time PET followers Valensina added returnable glass containers last year, and many other brand manufacturers are expanding their range in this direction. Smaller, convenient containers or cans are also interesting for younger, experience-hungry consumers as a stylish projection surface for party-ready, sparkling light juice enjoyment at home or on the go.

The challenge for branding in the fruit juice industry ultimately lies in placing brands with strong and distinctive branding in the everyday lives of consumers in an attractive context. Possible positioning anchors can still be found in regionality and sustainability, whereby storytelling is decisive. Social media-suitable stagings are now must-haves for lively brand-human relationships and an indispensable component for drawing attention to new creations and trends in the context of influencer marketing.

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