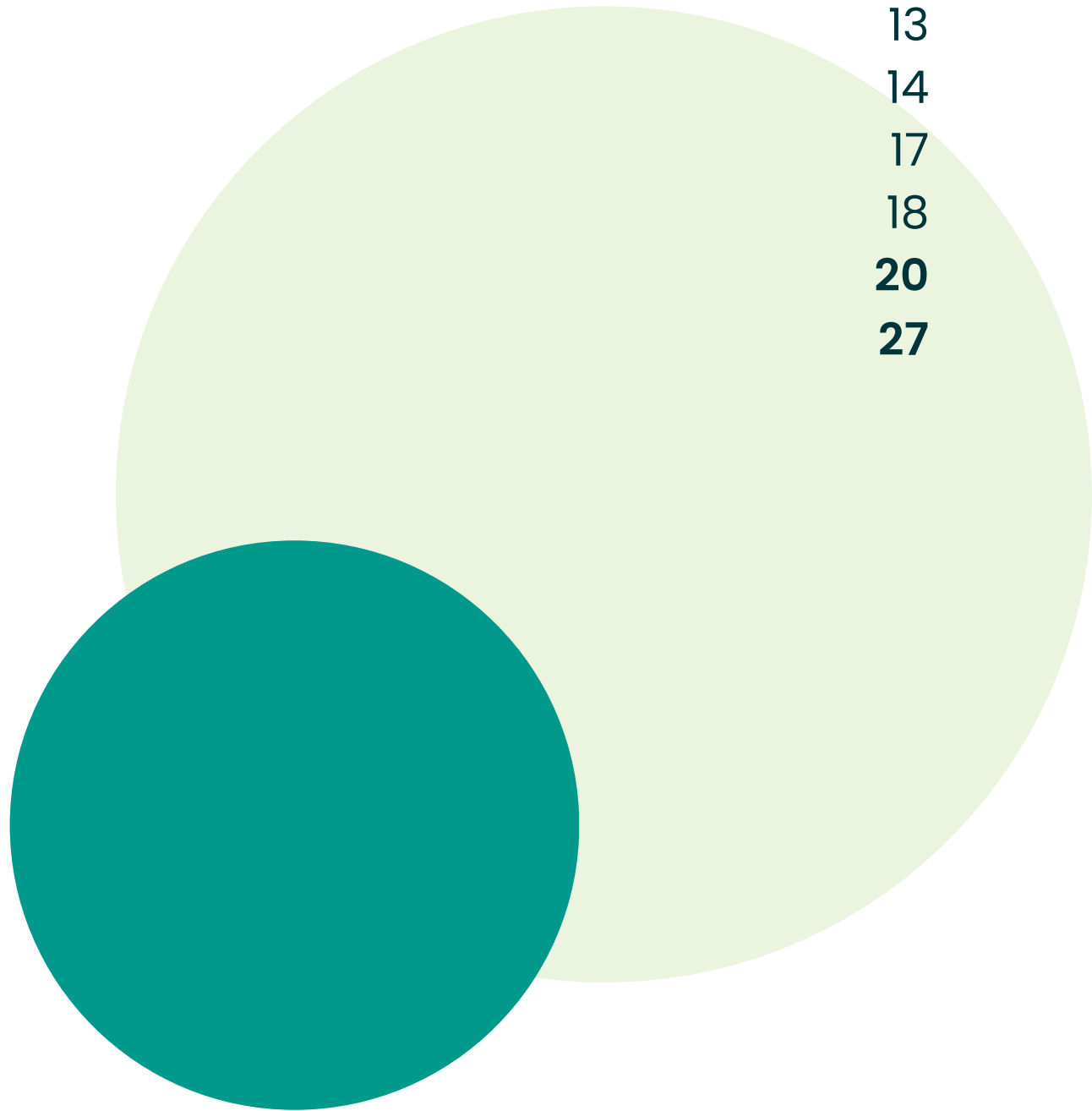


China Juice Market Report

Citrus Juice Market Development Officer, Olivia Tait
January 2024

APPENDIX

1. Market size and key statistics	2
1.1 Market size	2
1.2 Import market	4
1.3 Juice drinking culture in China	5
1.4 Health messaging being generated by medical entities	6
1.4.1 Improving physical health	6
1.4.2 Promote metabolism	6
1.4.3 Improve immunity	6
1.5 Fresh juice bars and shops	6
1.6 Drinks competing directly with juice	6
2. Market leaders	8
2.1 Huiyuan	9
2.2 Master Kong	10
2.3 Uni President	12
2.4 Minute Maid	13
2.5 Orchard Farmer	14
2.6 Pepsi Cola	17
2.7 BVI (Wei-Chuan)	18
3. Consumer survey	20
Acknowledgement	27



1. MARKET SIZE AND KEY STATISTICS

1.1 MARKET SIZE

In China, the juice market is divided into three categories. The first is low concentration fruit juice with a fruit juice content of 5–10%, such as Coca Cola's Qoo, Minute Maid's pulp juice and Master Kong's orange juice. In Australia, this category would be referred to as 'fruit drinks'.

The second category is composite juice, made from various fruits and vegetables, with a concentration of about 30%, such as Watsons' Juice Mr.

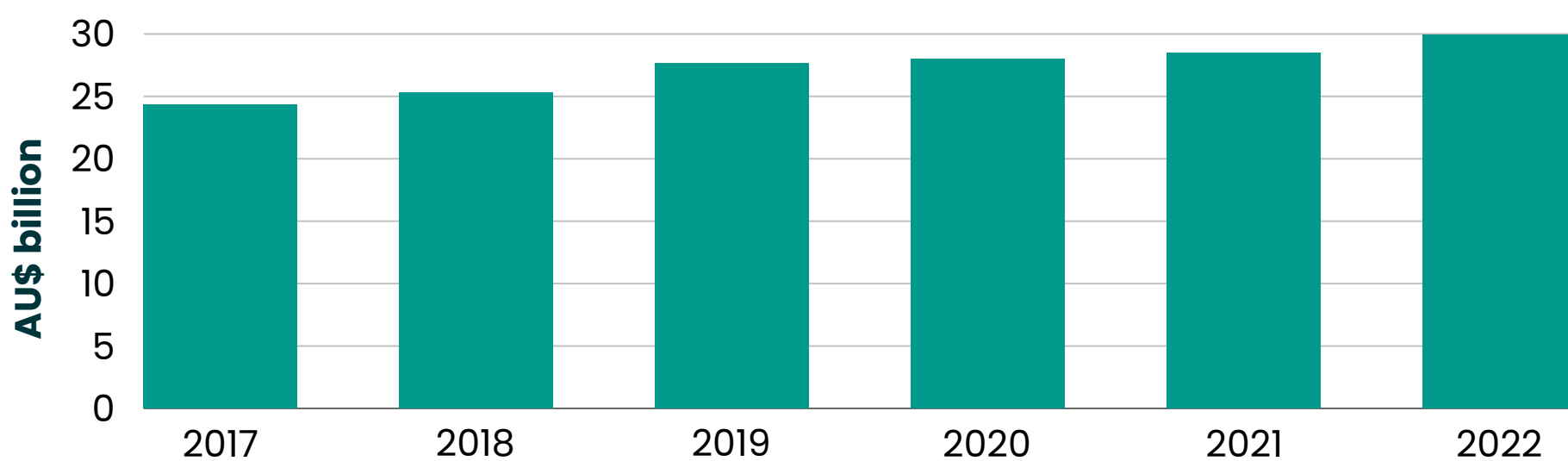
The third category is 100% fruit juice, which can be divided into 100% concentrated reduced fruit juice (FCOJ) and 100% non-concentrated fruit juice (NFC).

The very literal meaning of NFC in China refers to a fruit juice that is "directly filled after being squeezed from fresh fruits". It is considered to be natural with no additives, has a high nutritional value and tastes good. This fresh, unadulterated juice taps into the quality perception and the rising demand for products that are considered healthy.

Low concentration juice accounts for over 74% of the sales in China's juice industry, and the overall decline in sales in the juice market is mainly driven by the decline in low concentration juice sales. Emerging health trends such as low sugar, low calorie, and minimally processed, juices with a low concentration of fruit content are being abandoned by the main consumer group of beverages, young people, in favour of healthier, fresh tasting, and high appearance new drinks. The decline in juice consumption at the lower end, fruit drinks, is being off-set by an increase in demand of juice drinks made with a higher concentration of fruit juice and fresh juice – pure juice.

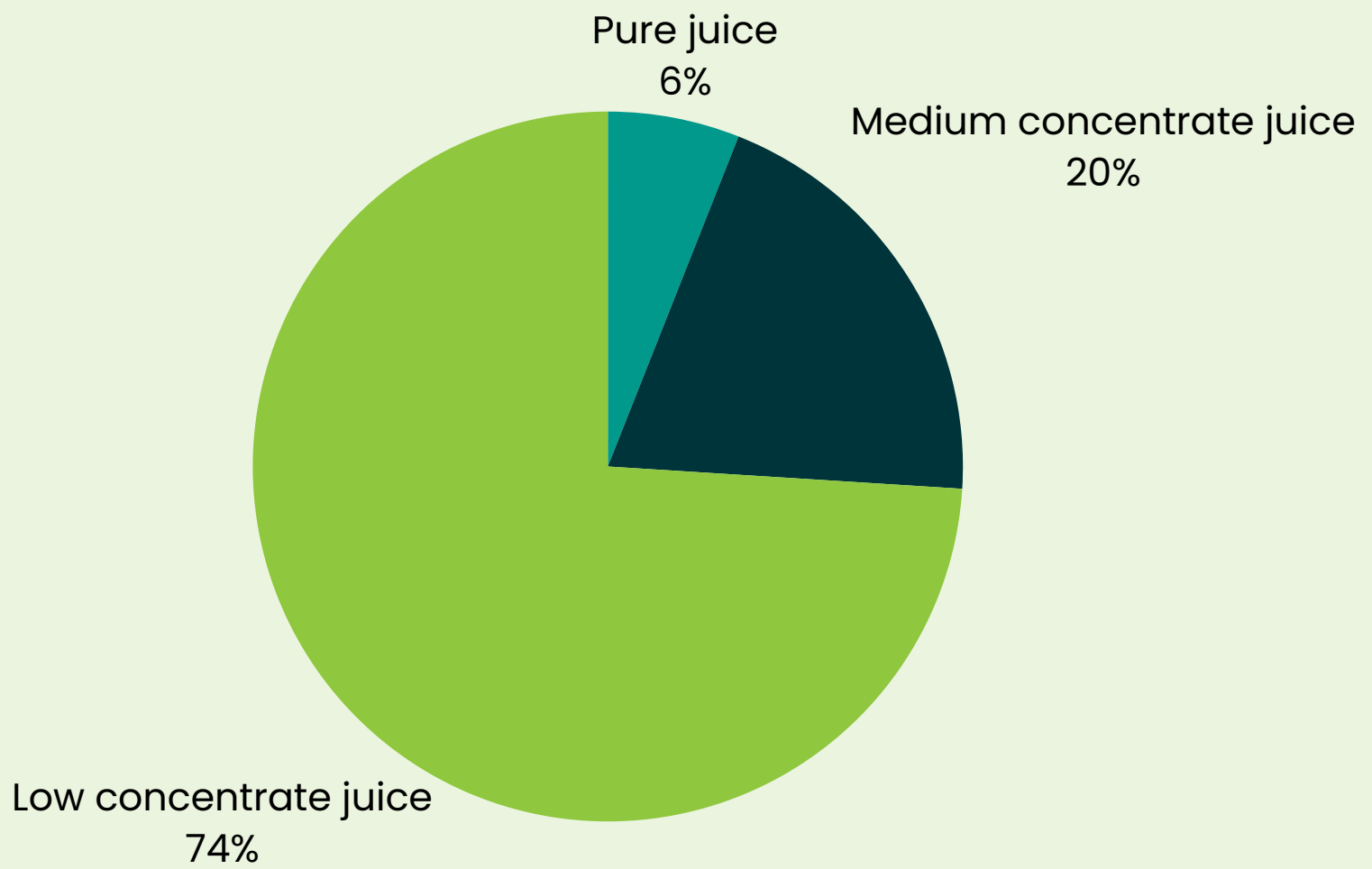
In 2022, China's total juice market was valued at AU\$29.91 billion, showing an increase of 5% from 2021.

Figure 1: China juice market size by value



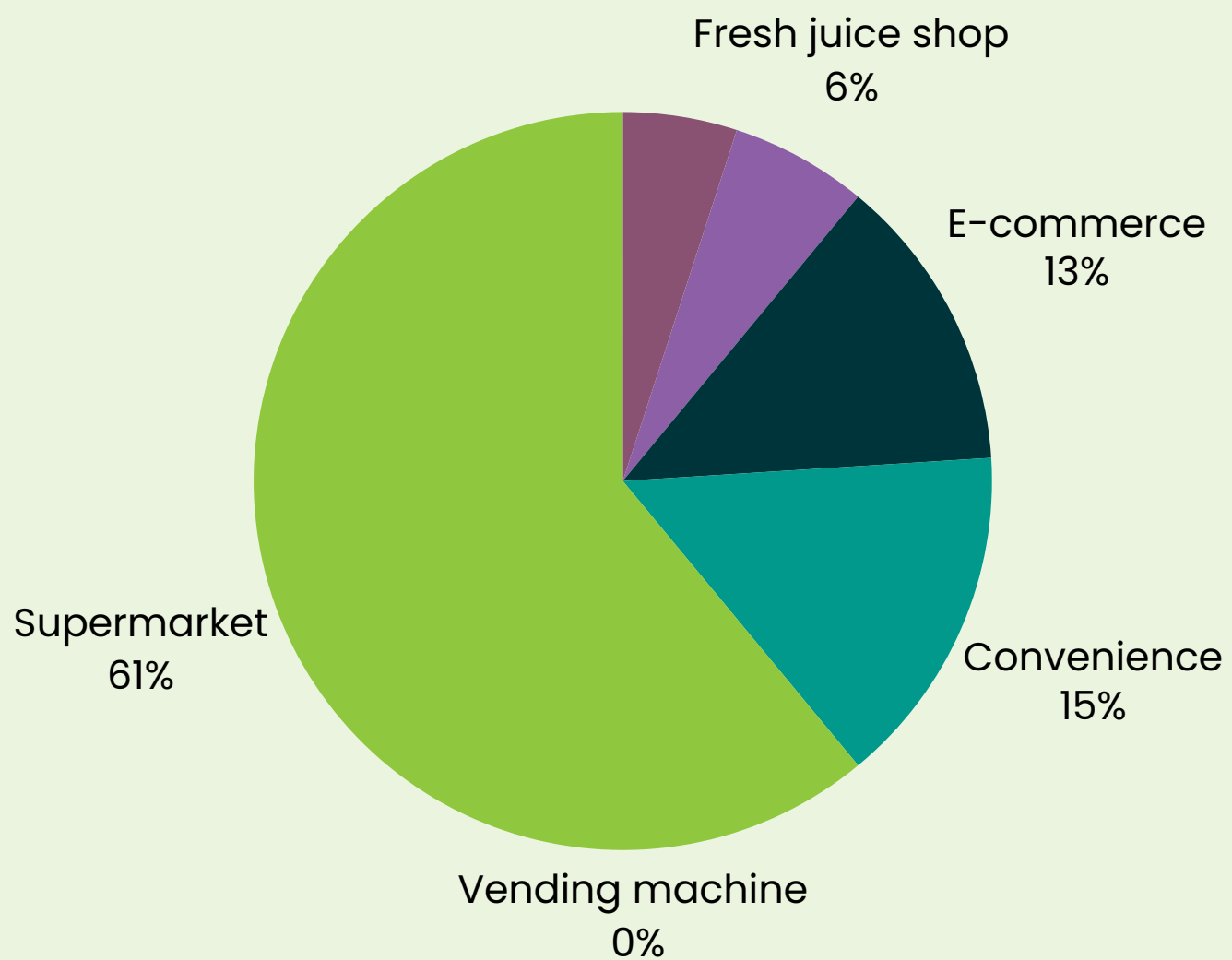
Low concentrate juice accounts for 74% of the total juice market.

Figure 2: Juice market breakdown



Supermarkets are the largest juice sales channel, accounting for a 61% share, followed by convenience stores (15%) and e-commerce (13%).

Figure 3: Juice sales channel



1.2 IMPORT MARKET

In 2022, China imported 350,313 tonnes of juice, with a value of US\$556 million. The average price was US\$1,587 per tonne.

Brazil (23%), Thailand (21%) and Vietnam (11%) are the top three juice exporters to the Chinese market, based on volume.

In 2022 Australia exported 484 tonnes of juice to China, with a value of US\$1.6 million.

Figure 4: Juice import by origin, 2022

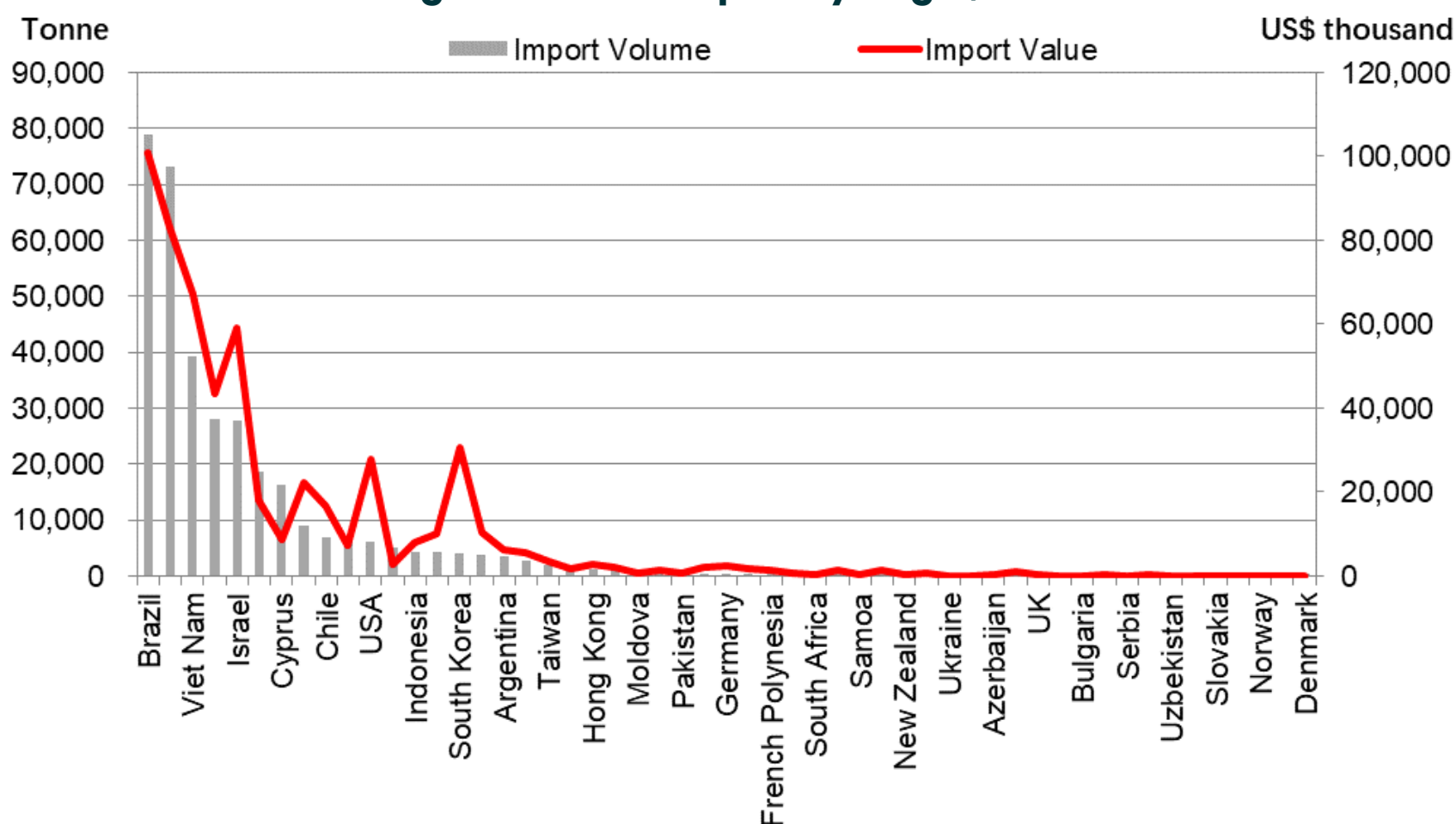


Table 1: China juice import 2013–2022

Year	Import volume (Tonne)	Import value (Million US\$)	Average Price (US\$/Tonne)
2013	107,128	229	2,142
2014	110,340	252	2,280
2015	106,829	209	1,953
2016	114,987	226	1,966
2017	140,569	283	2,013
2018	171,143	351	2,052
2019	198,295	365	1,841
2020	189,330	303	1,598
2021	303,369	495	1,633
2022	350,313	556	1,587

Ten exporting countries account for 87% of China’s total juice import market. Australia accounts for 0.1% of the total import market.

Figure 5: China juice imports, 2013–2022

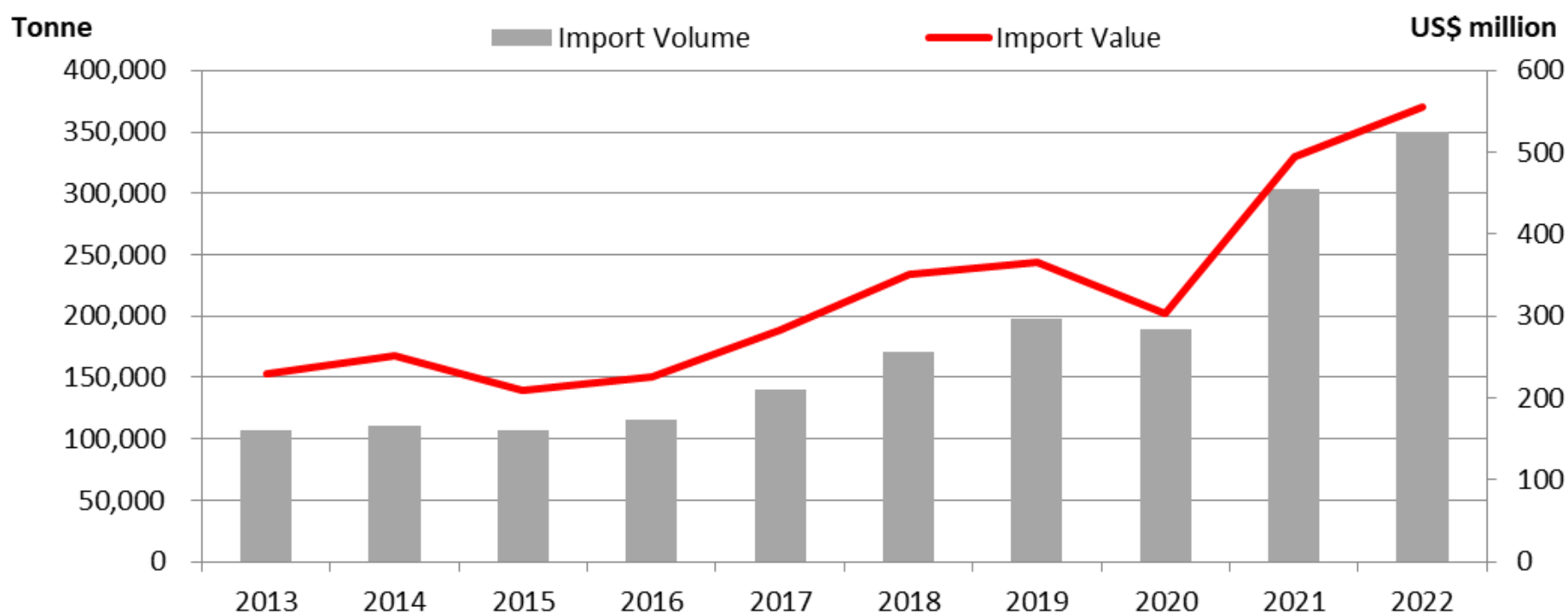


Table 2: Top ten juice exporter to China

Country	Import volume (Tonne)	Import value ('000 USD)	Share (%)
Brazil	78,849	100,792	23
Thailand	73,268	83,231	21
Viet Nam	39,276	67,250	11
Spain	28,136	43,559	8
Israel	27,771	59,118	8
Costa Rica	18,749	18,218	5
Cyprus	16,232	8,746	5
Philippines	9,037	22,269	3
Chile	6,929	16,721	2
Malaysia	6,299	7,118	2

1.3 JUICE DRINKING CULTURE IN CHINA

Chinese consumers rarely drink juice for breakfast. The occasion for drinking juice is more often during lunch or dinner, or as beverage between meals.

Traditional Chinese beverages include sour plum juice, sea-buckthorn juice and hawthorn juice. Sour plum juice is made from black plums, peaches, grapes and sugarcane, boiled with rock sugar. Rock sugar is believed to moisten the lungs, relieving coughing. Black plum and hawthorn are believed to reduce oil and fat, while strengthening the spleen.

1.4 HEALTH MESSAGING BEING GENERATED BY MEDICAL ENTITIES

From the perspective of traditional Chinese medicine, the belief is that drinking fruit juice has the following benefits for physical health:

1.4.1. Improving physical health

The commonly used ingredients in traditional Chinese medicine health juice include mulberry, goji berries and lotus seeds. These ingredients all have the effect of regulating the body. For example, it is believed mulberry can nourish the liver and kidneys, strengthen the spleen, and stimulate appetite; goji berries brightening the eyes and nourish the skin; lotus seeds nourish the spleen, benefit the stomach, clear the heart, and calm the mind. By combining these ingredients into a juice format, one can regulate their physical fitness and improve their health status.

1.4.2 Promote metabolism

Drinking more juice can increase the body's metabolic capacity, slow down aging and improve skin quality.

1.4.3 Improve immunity

Drinking more juice can supplement the body's essential Vitamin C, enhance the body's immune system, resist viruses, and reduce cold symptoms.

1.5 FRESH JUICE BARS AND SHOPS

At present, there are no large-scale chain fresh juice stores in the Chinese market. However, many beverage stores offer juice drinks, fruit smoothies, fresh juice, concentrated juice drinks and concentrated juice tea drinks.

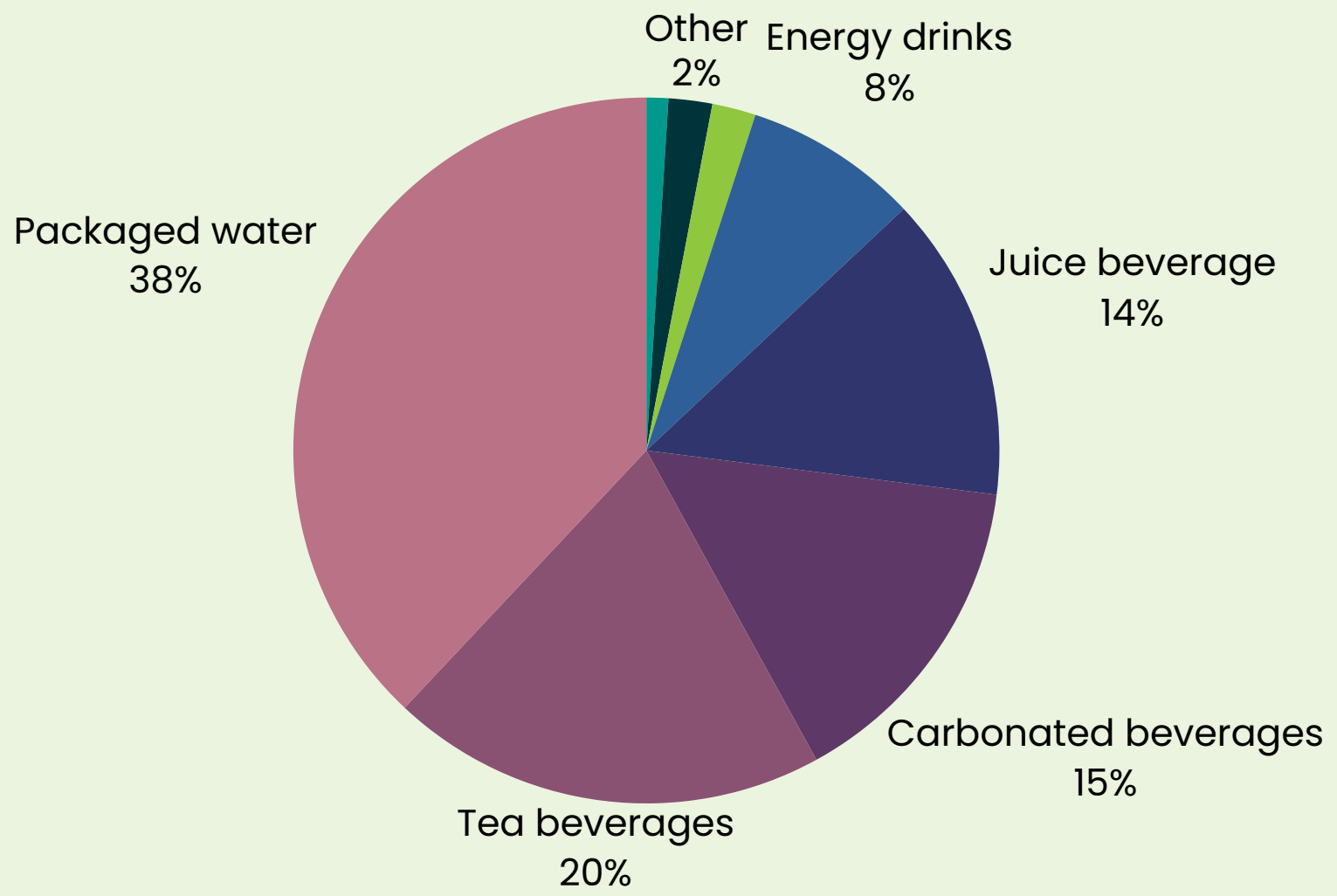
The most popular beverage stores in the Chinese market are tea beverage shops, with most of them offering fruit tea and juice-based blends made with concentrated juice.

The value of trade through tea beverage shops in 2022 was estimated at AU\$22.6 billion, and it is expected to reach AU\$32.6 billion in 2023. Trade is expected to reach AU\$43.8 billion per annum by 2025.

1.6 DRINKS COMPETING DIRECTLY WITH JUICE

Packaged water, tea beverages, carbonated beverages and energy drinks are all competitors to juice in the Chinese market.

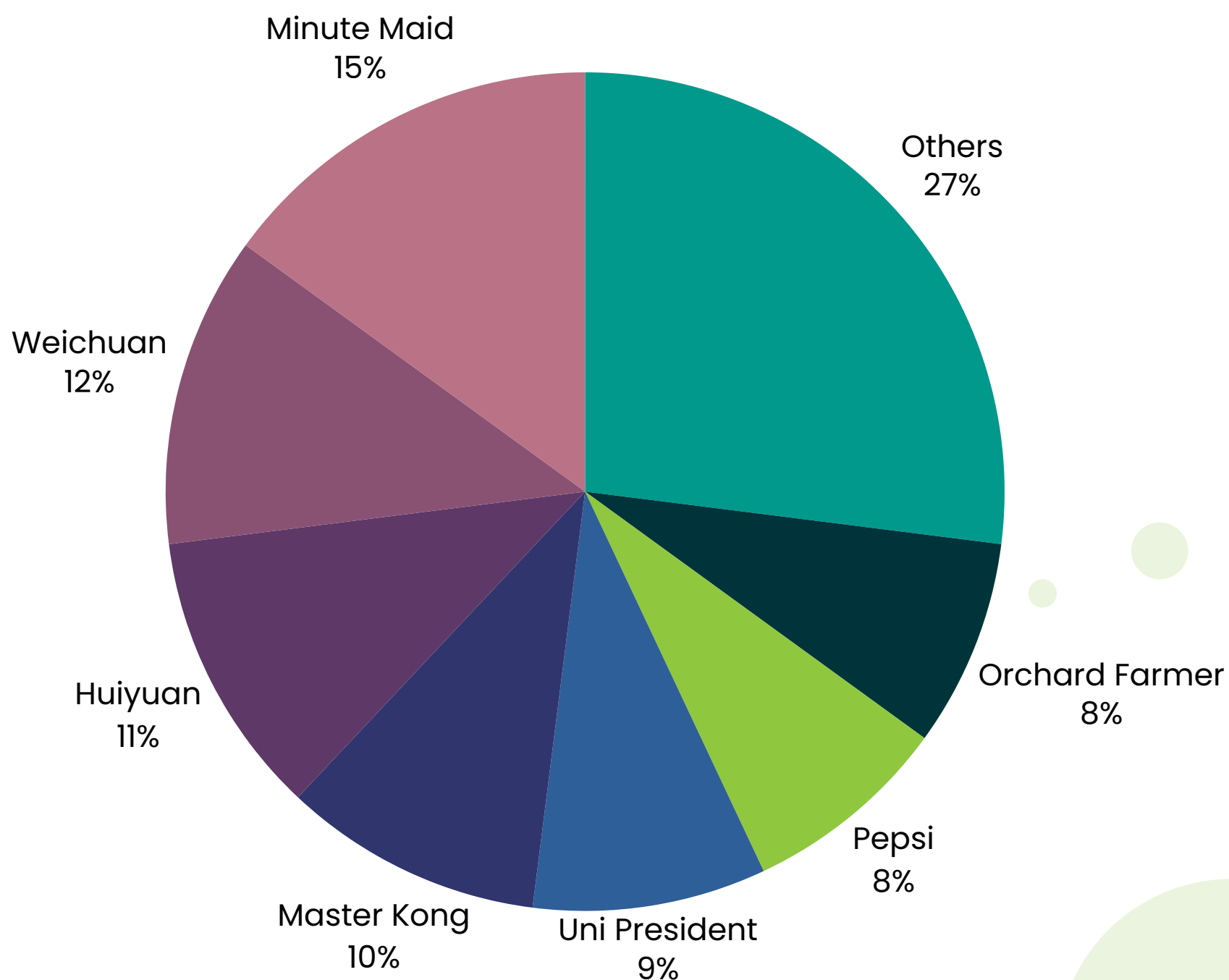
Figure 7: China soft beverage breakdown 2020



2. MARKET LEADERS

Minute Maid, Weichuan and Huiyuan, Master Kong, Uni President, Pepsi and Orchard Farmer are the top juice brands in the Chinese market. The top seven players hold 73% of the total market share. All prices quoted are retail or online selling prices.

Figure 8: Top juice players 2021



康師傅控股



2.1 HUIYUAN

- HQ: Beijing
- Private company
- Established in 1992
- 2022 sales revenue: AU\$0.61 billion
- 2022 net profit: AU\$43.48 million
- More than 140 business entities across China
- More than 20 agricultural industrial parks in more than 10 provinces
- Juice product categories: 100% juice, pulp series, juice for child low concentrate juice
- Has more than 600 products
- Has more than 300 world's advanced fruit processing production line
- Juice type: orange, grape, apple, peach, pear and kiwifruit
- Product export to more than 30 countries and regions, such as the United States, Australia, Algeria, South Korea, Singapore, Malaysia, India, and Europe
- Has online shop in major e-commerce platform, such as JD and Taobao
- Website: <http://www.huiyuan.com.cn>

Table 4: Huiyuan key juice products

Product	Type	Package	Price (AU\$/package)
100% juice	Orange/ grape/ apple/ peach/ pear/ blood orange/tomato	1 litre	3.48
100% juice	Orange/grape/ apple/peach/ pear/ blood orange and tomato	330ml	1.65
100% juice	Lemon, peach, apple	2,000ml	4.35
100% juice	Prune	200ml*12 box	17.39
100% juice	Orange, grape, apple, peach	300ml* 8 bottle	13.04
100% NFC	Orange, lemon, apple, pear and carrot	300ml* 9 bottle	21.74
100% NFC	Prune	200ml* 10 bottle	26.09
Pulp juice	Peach, blood orange and blueberry	250ml*12 box	10.87
Pulp juice	Peach, orange, strawberry blood orange and blueberry	1 liter* 5 box	12.17
Cranberry mixed juice	Cranberry and carrot mixed juice	350ml* 6 bottle	13.04
Low concentrate juice	Orange, peach, mango and kiwi fruit	2,500	3.48



2.2 MASTER KONG

- HQ: Shanghai
- Public company
- Start beverage business in 1996
- 2022 beverage business sales revenue: AU\$10.5 billion, showing an increase of 7.89% from 2021
- Beverage business accounts 61.4% of the total companies revenue
- 2022 beverage business profit: AU\$299 million
- Juice business account 14% of total beverage business
- In March 2012, further expanded its beverage business by forming a strategic alliance with PepsiCo for the beverage business in the China.
- Exclusively manufactures, bottles, packages, distributes and sells PepsiCo soft drinks in China
- Has 340 sales offices and 341 warehouses serving 80,726 wholesalers and 256,567 direct retailers as of 31 December 2021
- Has online shop in major e-commerce platform, such as JD and Taobao
- Website: <https://www.masterkong.com.cn>

Table 5: Master Kong business breakdown

Category	2021 (Million AU\$)	2022 (Million AU\$)	YOY (%)	Share (%)
Tea	39.11	41.38	5.81	39
Water	9.89	10.65	7.65	10
Juice	12.55	14.88	18.57	14
Carbonated beverages and others	35.85	38.18	6.48	36
Total	97.40	105.08	7.89	100

Figure 9: Master Kong beverage business 2022

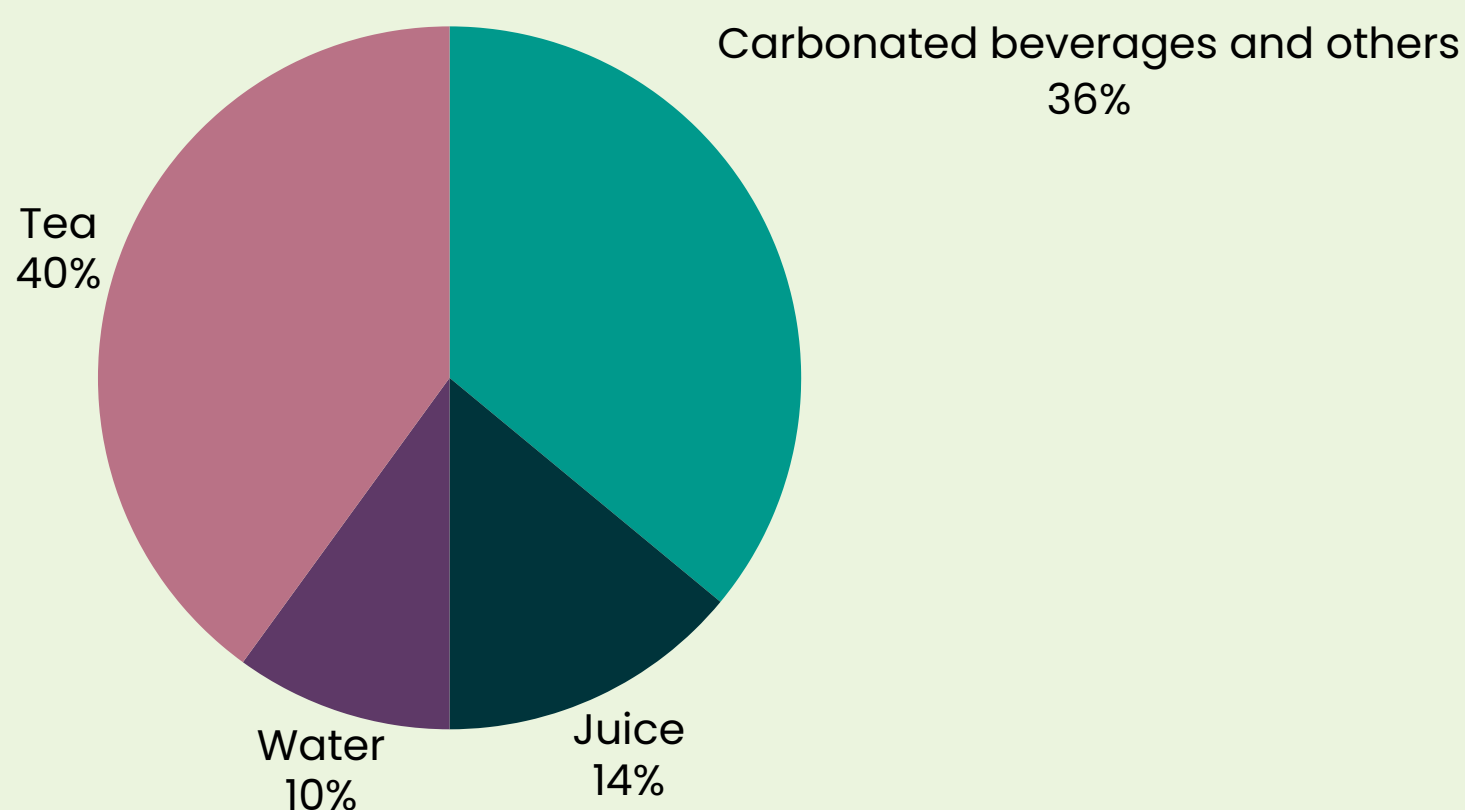


Table 6: Master Kong key juice products

Product	Type	Package	Price (AU\$/package)
Low concentrate juice	Pear	1 litre	1.09
Low concentrate juice	Pear	250ml*6 box	1.80
Low concentrate juice	Pear	330ml*12 bottle	4.78
Low concentrate juice	Pear	500ml	0.76
Low concentrate juice	Peach/ orange	330ml*12 bottle	4.78
Low concentrate juice	Grapefruit	500ml*15 bottle	10.28
Low concentrate juice	Grapefruit	330ml*12 bottle	4.35
Low concentrate juice	kumquat lemon	500ml*15 bottle	9.35
Low concentrate juice	kumquat lemon	330ml*12 bottle	5.22
Low concentrate juice	kumquat lemon	310ml*24 can	11.74
Low concentrate juice	Red grapefruit	330ml*12 bottle	6.09



2.3 UNI PRESIDENT

- HQ: Shanghai
- Public company
- Established in 1992
- 2022 juice business sales revenue: AU\$0.65 billion, showing an increase of 35.4% from 2021, the highest revenue in the past 6 years
- Juice business accounts FOR 18.3% of the total companies revenue
- Production bases: Shenyang, Haerbin, Changchun, Changbai Mountain, Beijing, Tianjin, Shanxi, Inner Mongolia, Shijiazhuang, Zhengzhou, Jinan, Henan, Yantai, in Wuhan, Changsha, Nanchang, Wuxue, Kunshan, Hefei, Hangzhou, Shanghai, Jiangsu, Xuzhou, Guangzhou, Fuzhou, Nanning, Hainan, Bama, Chengdu, Kunming, Chongqing, Guiyang, Xinjiang, Shaanxi, Aksu, Hutubi, and Baiyin.
- Product sale throughout China
- Has online shop in major e-commerce platform, such as JD and Taobao
- Website: <http://www.uni-president.com.cn>

Table 7: Uni President key juice products

Product	Type	Package	Price (AU\$/package)
100% juice	Tomato	335ml*24 can	30.00
100% juice	Tomato	180ml*12 can	24.35
100% juice	Orange/carrot/grape	300ml*12 bottle	16.74
Low concentrate juice	Orange	2 litres	1.96
Low concentrate juice	Orange	450ml	0.76
Low concentrate juice	Peach/orange	450ml*15 bottle	6.09
Low concentrate juice	kumquat lemon/hawthorn	500ml*15 bottle	10.65
Low concentrate juice	Dark plum/mango	245 ml*12 can	16.74



2.4 MINUTE MAID

- China HQ: Shanghai
- Public company
- Brand under Coca Cola
- In 2005, launched Minute Maid in the Chinese market, which has become the number one brand of ready-to-drink juice drinks in China, and has also promoted China to become the largest market for Minute Maid in the world
- Has online shop in major e-commerce platform, such as JD and Taobao
- Website: <https://www.coca-colacompany.com/>

Table 8: Minute Maid key juice products

Product	Type	Package	Price (AU\$/package)
Pulp juice	Grape/orange/peach	1,250ml	1.63
Pulp juice	Grape/orange/peach	420 ml	0.87
Pulp juice	Grape/orange/peach	420 ml*12 bottle	10.43
Pulp juice	Grape/orange/peach	300ml*12 bottle	4.98
Low concentrate juice	Orange/peach/apple/grape	450 ml	0.87
Low concentrate juice	Orange	1,500ml	1.74
Low concentrate juice	Orange/peach/apple	450ml 12 bottle	10
Low concentrate juice	Orange	300ml*12 bottle	0.76
Low concentrate juice	Orange	185ml*8 can	4.78
Low concentrate juice	Orange	260ml* 6 bottle	3.04
Low concentrate juice	Guava	420ml*12 bottle	11.52



2.5 Orchard Farmer

- HQ: Hangzhou, Zhejiang
- Public company
- Established in 1996
- Juice brand under Nongfu Spring
- 2022 juice business sales revenue: AU\$619 million, showing an increase of 10% from 2021
- Juice business accounts 9% of the total companies revenue
- Has more than 4,000 distributors across China
- Has more than 10,000 sales across China
- Has company owned orange orchard in Jiangxi
- Has company owned apple orchard in Xinjiang
- Main juice products: 30% mixed juice, 12% juice, 100% NFC juice, 100% NFC juice(refrigerated type) and 17.5° 100% fresh fruit cold pressed orange juice
- Has online shop in major e-commerce platform, such as JD and Taobao
- Website: <http://www.nongfuspring.com/>

Table 9: Orchard Farmer business breakdown

Category	2021 (Million AU\$)	2022 (Million AU\$)	YOY (%)	Share (%)
Water	3,668	3,928	7	55
Tea	985	1,485	51	21
Functional beverage	795	825	4	12
Juice	562	619	10	9
Others	376	291	-23	4
Total	6,386	7,148	12	100

Figure 10: Orchard Farmer business

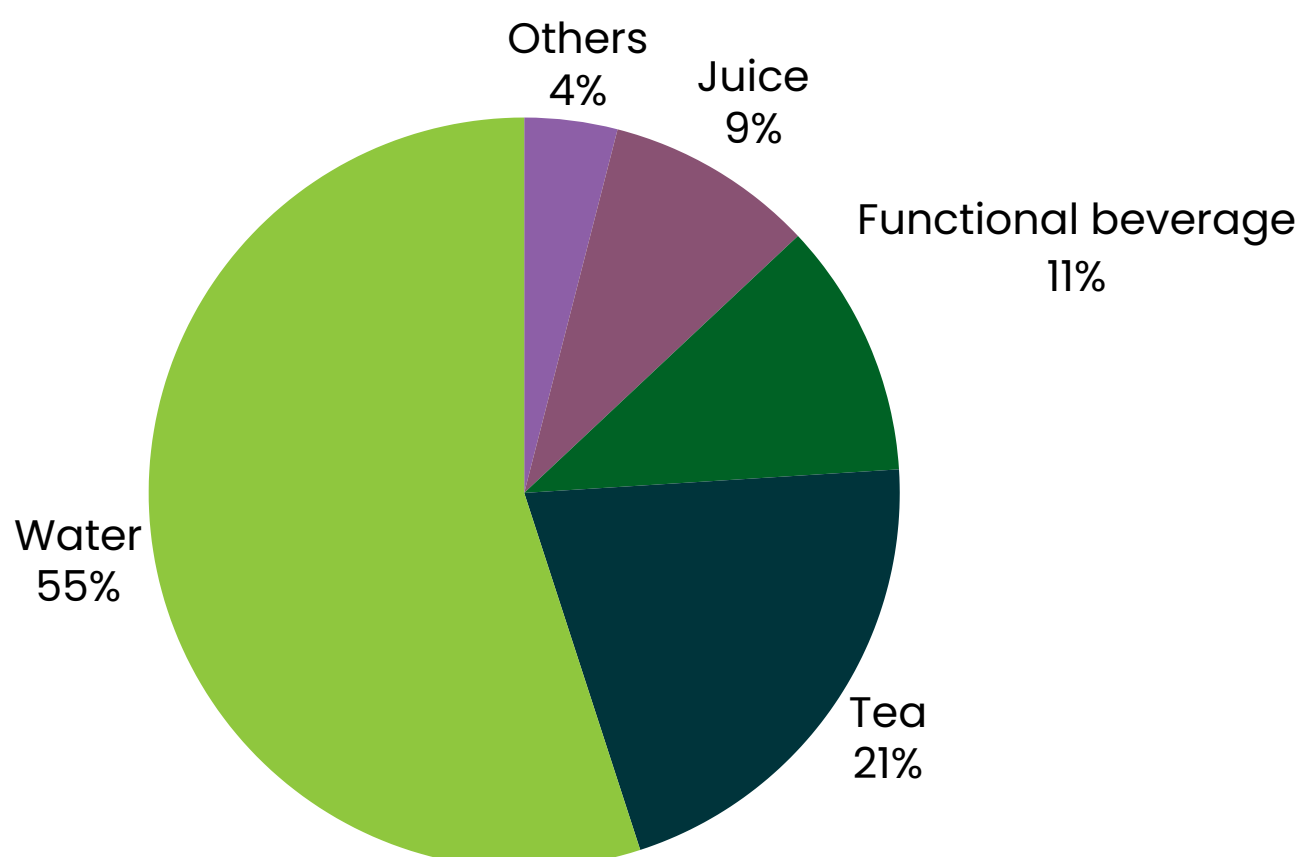


Table 10: Orchard Farmer key juice products

Product	Type	Package	Price (AUD/package)
100% NFC juice	Orange /mango/apple & banana/ Guava	300ml	1.52
100% NFC juice	Orange /mango/apple & banana/ Guava	900ml	4.02
100% NFC juice	Orange Orange /mango/apple & banana/ Guava	300ml*10 bottle	14.13
100% NFC juice	Orange /mango/apple & banana/ Guava	300ml*24 bottle	33.04
12% juice	Green orange/grapefruit/lemon	445 ml*15bottle	13.04
30% juice	Mixed juice	450ml	0.8
30% juice	Mixed juice	1,250ml	2.07
30% juice	Mixed juice	450ml*15 bottle	15
7% lemon juice	Lemon	300ml*6 bottle	8.7
17.5°100% fresh	Orange/apple	300ml*6 bottle	23.26
100% NFC juice (refrigerated type)	Orange /mango/pineapple/apple	300ml*8 bottle	15.87



30% MIXED JUICE



100% NFC JUICE



100% NFC JUICE (REFRIGERATED TYPE)



12% JUICE



17.5°100% FRESH



7% LEMON JUICE

2.6 PEPSI COLA

- HQ: Shanghai
- Public company
- Sino-foreign joint venture in China
- Entered China in 1980
- 2022 sales revenue in China: AU\$4.05 billion
- 2022 sales revenue: AU\$134.99 billion
- 2022 net profit: AU\$13.92 billion
- Total Investment: PepsiCo and its partners have invested over US\$1 billion in China since 1981
- All institutions: PepsiCo has more than 40 joint ventures or sole proprietorships in China
- Employment: Pepsi and Frito-Lay directly employ nearly 10,000 Chinese workers
- Beverage sector: 20 bottling plants in 20 cities, and a wholly owned concentrate plant. The flagship brands include Pepsi Cola, 7 Up, Mirinda, Pepsi Light, Pepsi lime, extreme and Mountain Dew, Tropicana Pure, Dole Juice, Gatorade and Lipton tea
- Juice brand Dole Juice, Tropicana Pure
- Dole juice product: Smoothie (Frozen Fruit Juice), fruit juice jelly
- Tropicana juice product: Orange juice, apple juice, grape juice
- Has online shop in major e-commerce platform, such as JD and Taobao
- Website: <https://www.pepsico.com.cn/index.html>

Table 11: Pepsi Cola key juice products

Brand	Product	Type	Package	Price (AU\$/package)
Tropicana	100% juice	Orange/ grape/ apple paper box	1 litre	2.66
Tropicana	100% juice	Orange/ grape/ apple paper box	330ml	1.74
Tropicana	100% juice	Orange/ grape/ apple glass bottles	250ml	1.81
Dole	Fruit juice jelly	Green Grape/ lychee/ orange/ pineapple	150g*8 bag	10.65
Dole	Fruit juice jelly	Peach/ raspberry	130g *3bag	8.48
Dole	Smoothie (Frozen Fruit Juice)	Green Grape/ orange/ pineapple	62ml*8	4.33





**100% JUICE 330ML
GLASS BOTTLES**

**100% JUICE 1 LITRE
TETRA PACK**

**100% JUICE 1 LITRE T
ETRA**

2.7 BVI (WEI-CHUAN)

- HQ: Hangzhou
- Public company
- Established in 1953
- Total revenue AU\$4.34 billion
- Profit AU\$1.195 billion
- Gross profit AU\$72.61 million
- Net revenue AU\$52.17 million
- Juice brand: Weichuan Daily C
- In 1953, Wei Quan Company was established in Taiwan. Hangzhou Weiquan Food Co., Ltd. was established in 2002. The factory is located in Hangzhou, Zhejiang and Langfang, Hebei
- In April 2014, Daily C Carrot Fruit and Vegetable Mixed Juice won the Monde Selection Silver Award in 2014, while Daily C Orange Juice and Daily C (Fresh squeezed) Citrus Lemon Juice won the Bronze Award in the same period
- In May 2014, Daily C Carrot Fruit and Vegetable Mixed Juice won two stars of the "2014 International Flavor and Quality Award"
- Has online shop in major e-commerce platform, such as JD and Taobao
- Website: www.weichuan.com.cn

Table 12: BVI(Wei-Chuan) key juice products

Product	Type	Package	Price (AUD/package)
100% juice	Fresh orange juice/grape juice/carrot juice/apple juice	1.6 litre	5.83
100% juice	Fresh orange juice/grape juice/carrot juice/red bayberry Juice/ Strawberry Peach Compound Juice	900ml	3.59
100% juice	Strawberry Peach Juice/ Peach Juice/ red bayberry Juice/ Orange Juice/ Carrot Juice/ lychee Juice/ Grape Juice	300ml	1.21

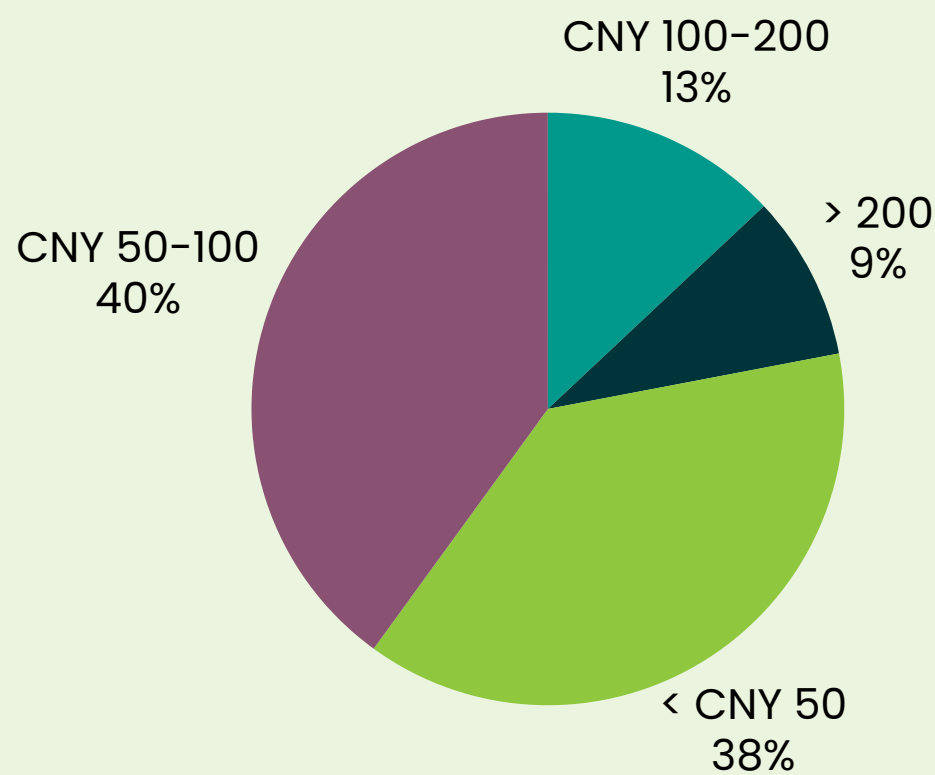


3. CONSUMER SURVEY

In association with this report, Asian Agribusiness Consulting conducted a consumer survey on juice consumption in China. The survey is based on 53 respondents, 49% male and 51% female.

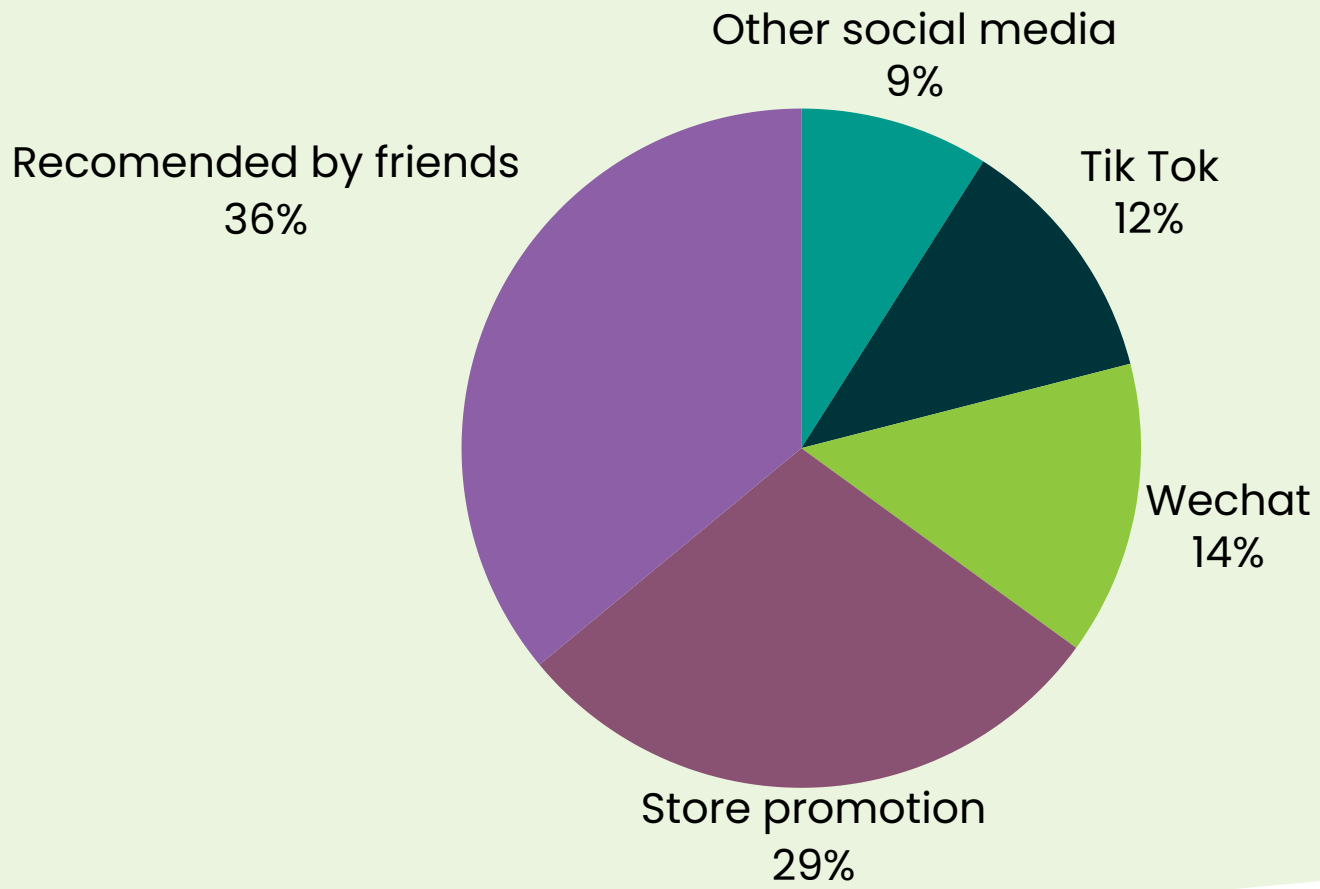
Among the 53 respondents, 51 per cent were 20–35 years old, 43% were between 36–50 years old and 6% were older than 50.

Figure 13: China monthly expenses on juice



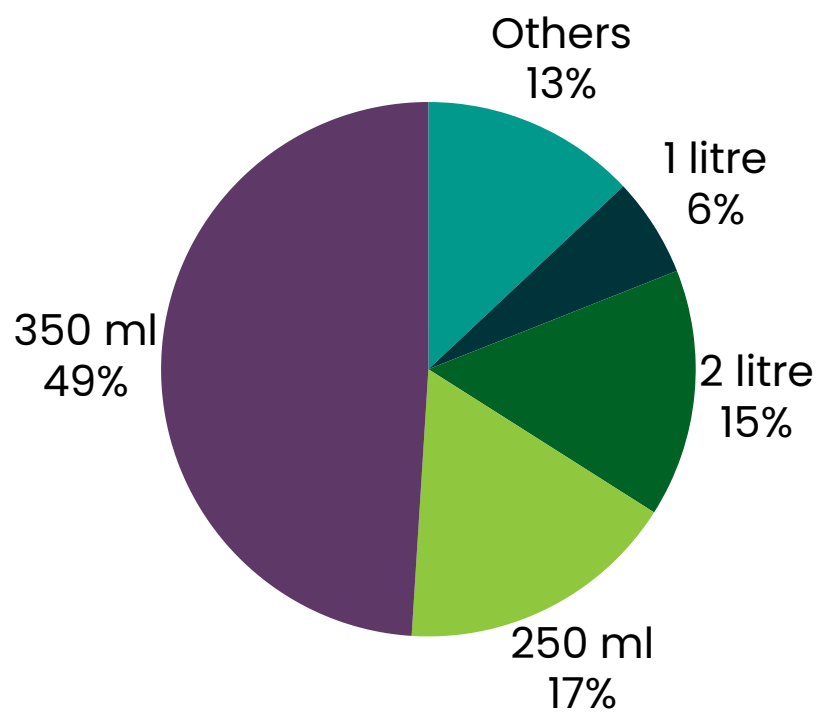
Just over 37% of respondents said they spent less than CNY 50 (AU\$10.50) each month on juice products, while 39.6% said they spend between CNY 50 – CNY 100 (AU\$10.50 – AU\$21) each month on juice products.

Figure 14: Factors influencing juice purchases



Peer-to-peer recommendations and store promotions are two of the main influences on Chinese consumers' juice purchasing patterns, according to the survey. Social media holds 26% of people's choices, in which WeChat and Tik Tok account 14% and 12%, respectively.

Figure 15: Package size preference



According to the survey, the 350ml bottle is the favourite size for juice packaging with 49% of respondents preferring this package size. The 250ml bottle is also a good package size for juice.

Glass bottles were the most popular packaging format among the respondents, with just under half of the respondents nominating them as their preferred choice. Plastic bottles were also popular.

Figure 16: Package preference

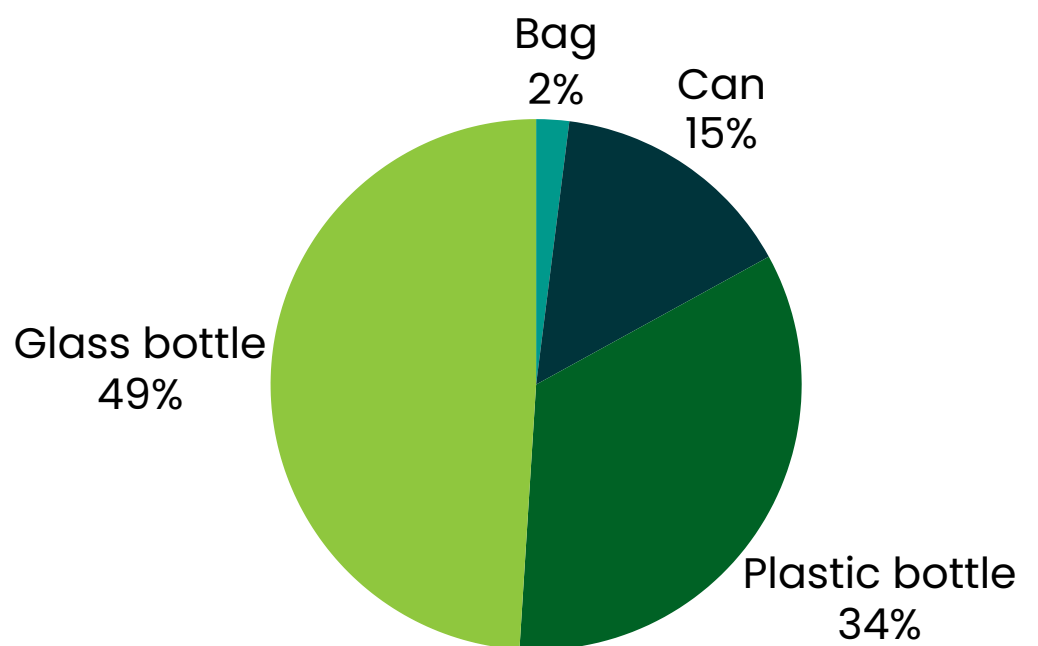
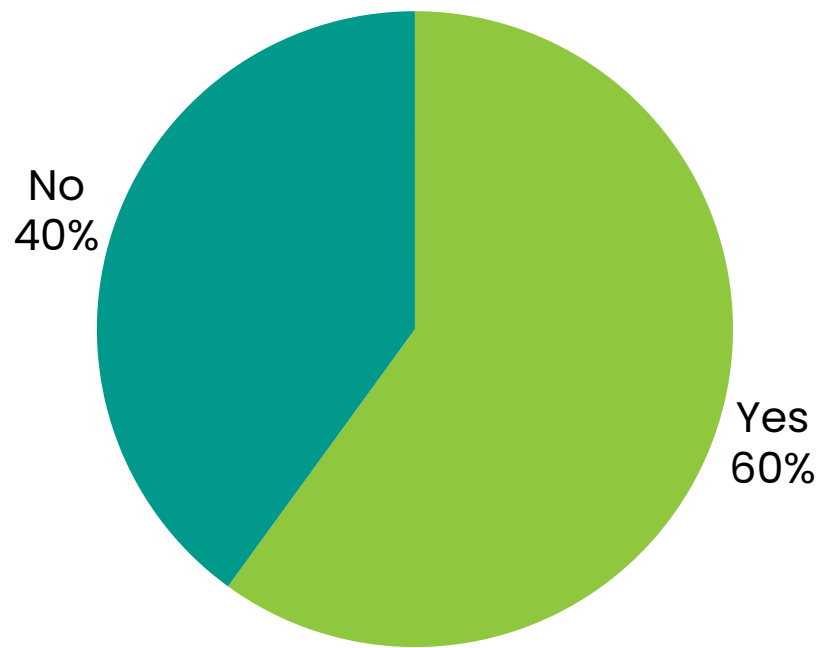
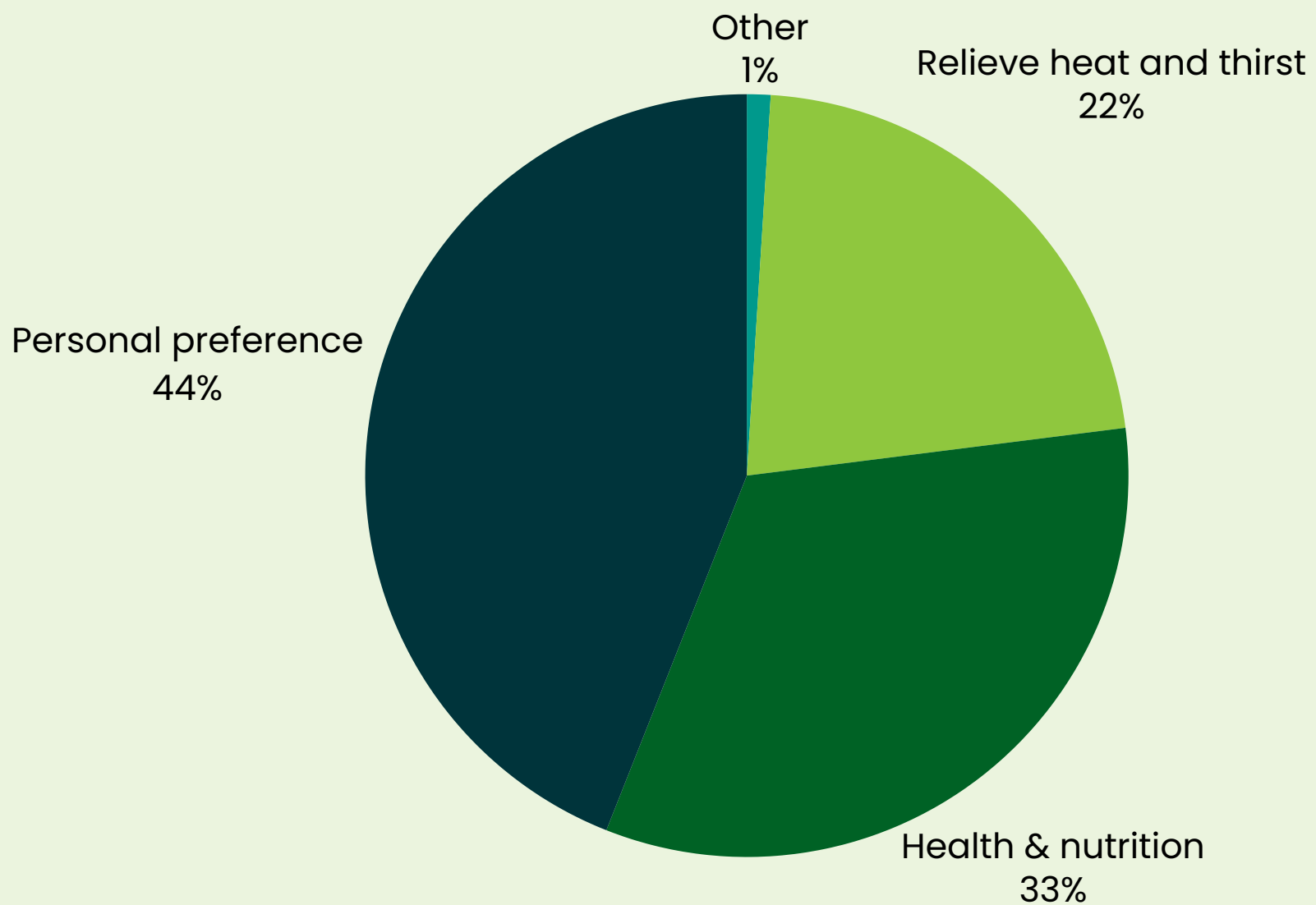


Figure 17: Does the appearance of the packaging effect your purchasing decision?



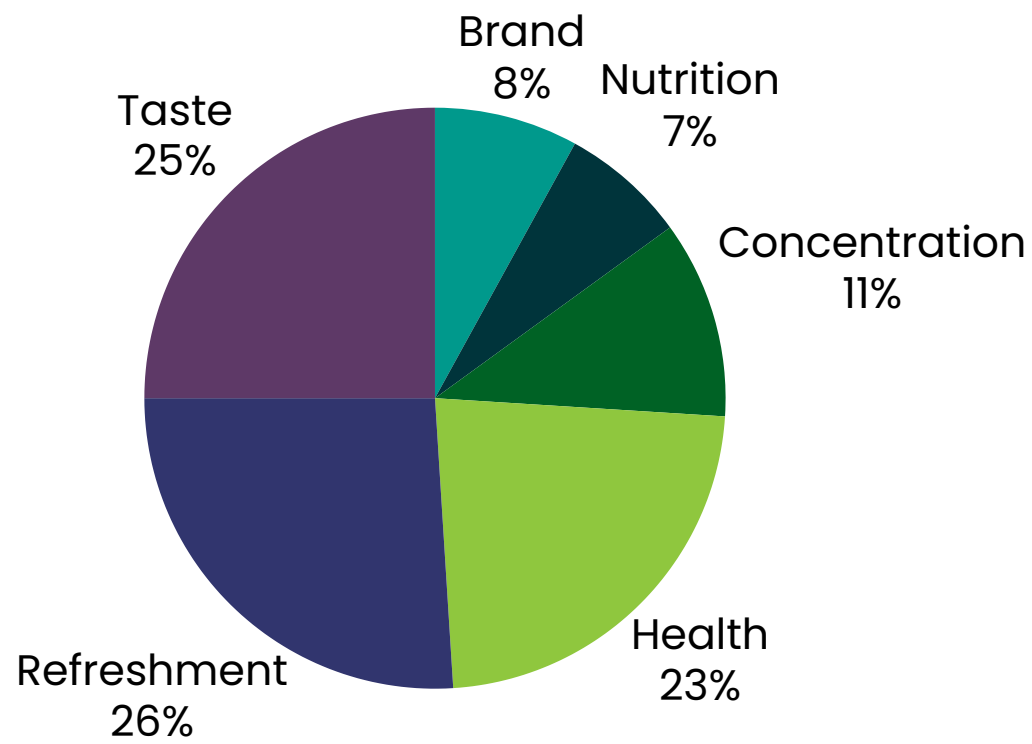
Over 50% of survey participants said they would purchase juice based on decorative packaging, indicating it is a significant factor influencing the purchasing decision.

Figure 18: Reason to purchase juice



When asked their reason for purchasing juice, 44% of respondents indicated 'personal preference', while 33% chose juice for health and nutritional reasons.

Figure 19: Attributes in juice important to consumers



When asked about the attributes that draw them to purchasing juice, survey participants identified refreshment, taste and health as the main attributes.

According to the survey, 43% of respondents prefer slightly acidic flavour and 57% of respondents prefer slightly sweet flavour.

Figure 20: Flavor preference

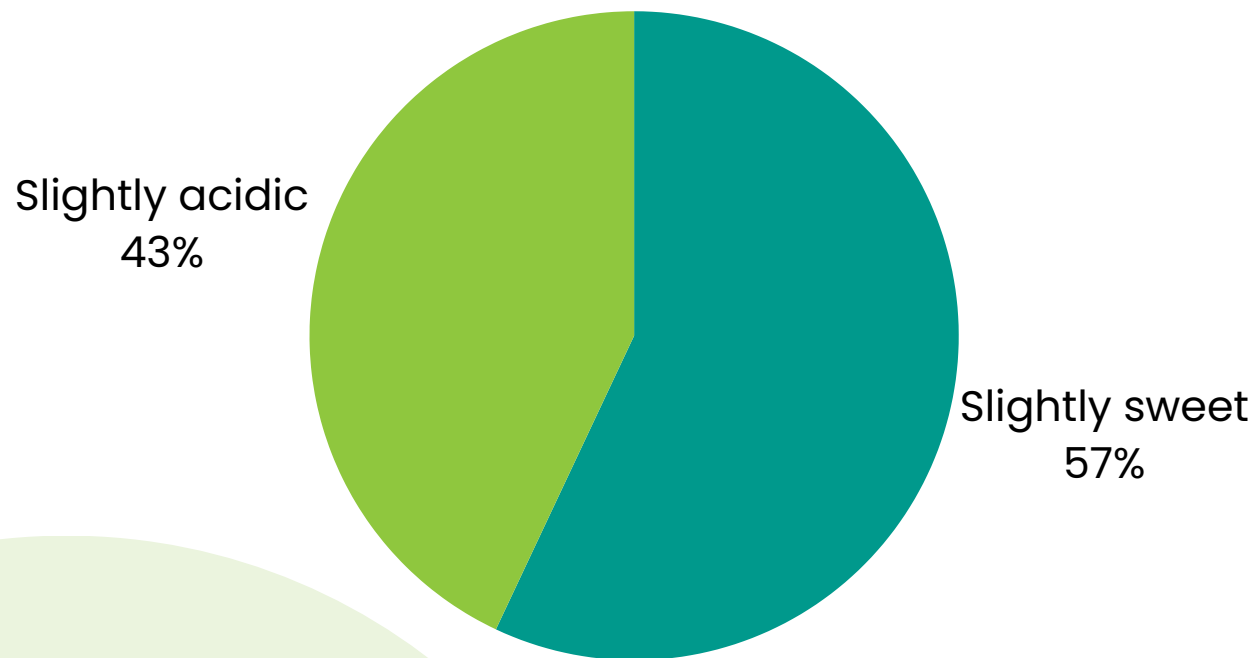
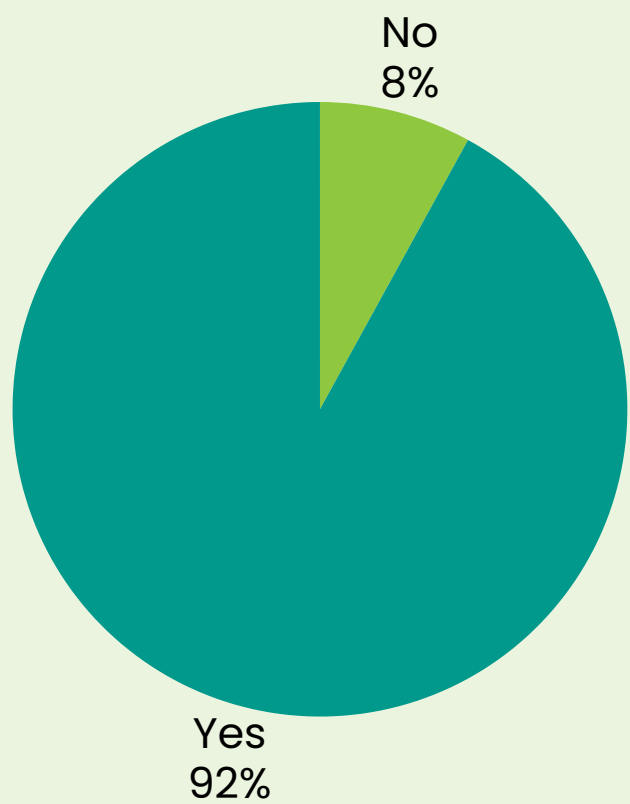


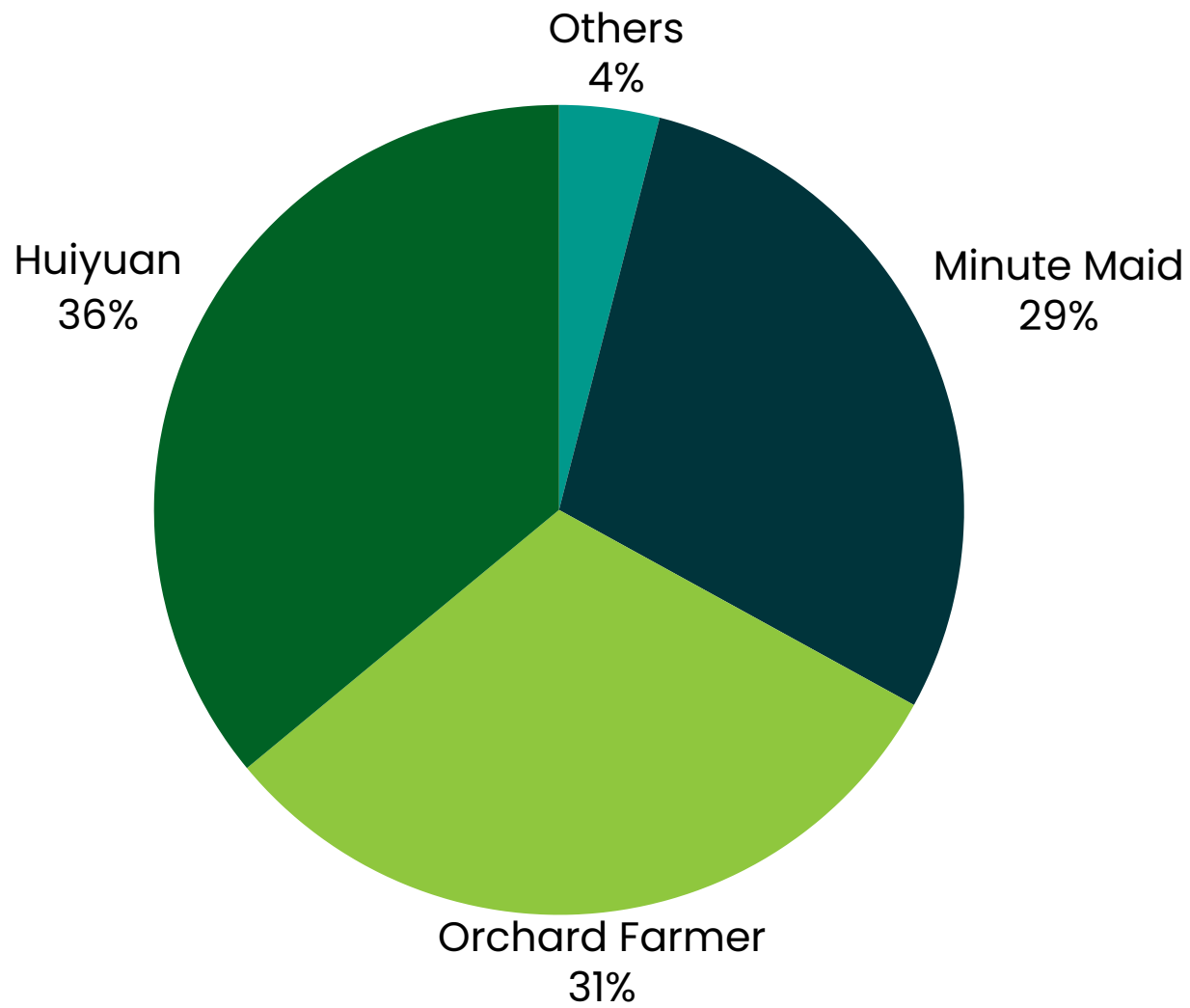
Figure 21: Pulp juice preference



Over 90% of consumers surveyed preferred pulp juice.

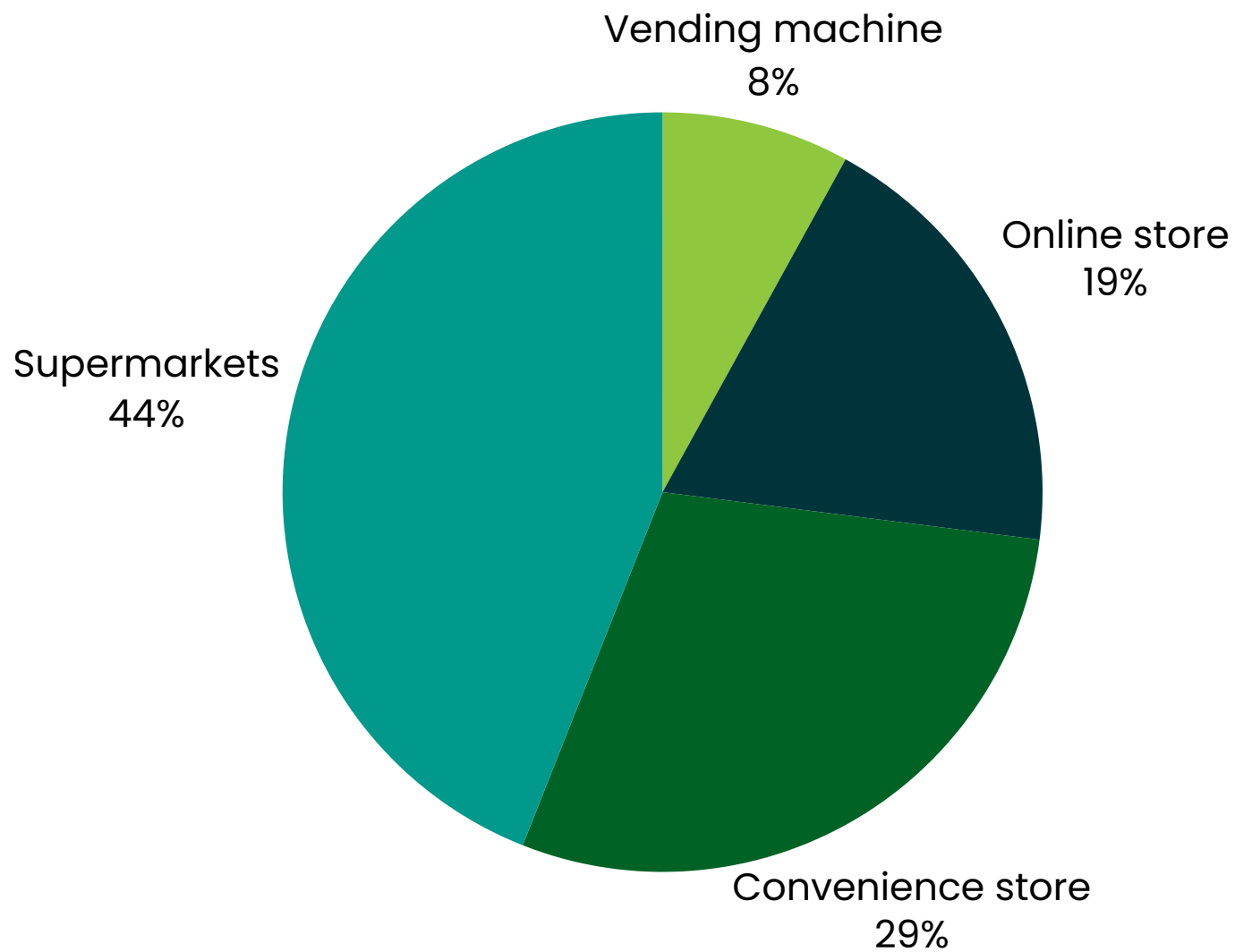
Huiyuan, Orchard Farmer and Minute Maid are the leading juice brands in the Chinese market, according to the survey results.

Figure 22: Juice brand preference



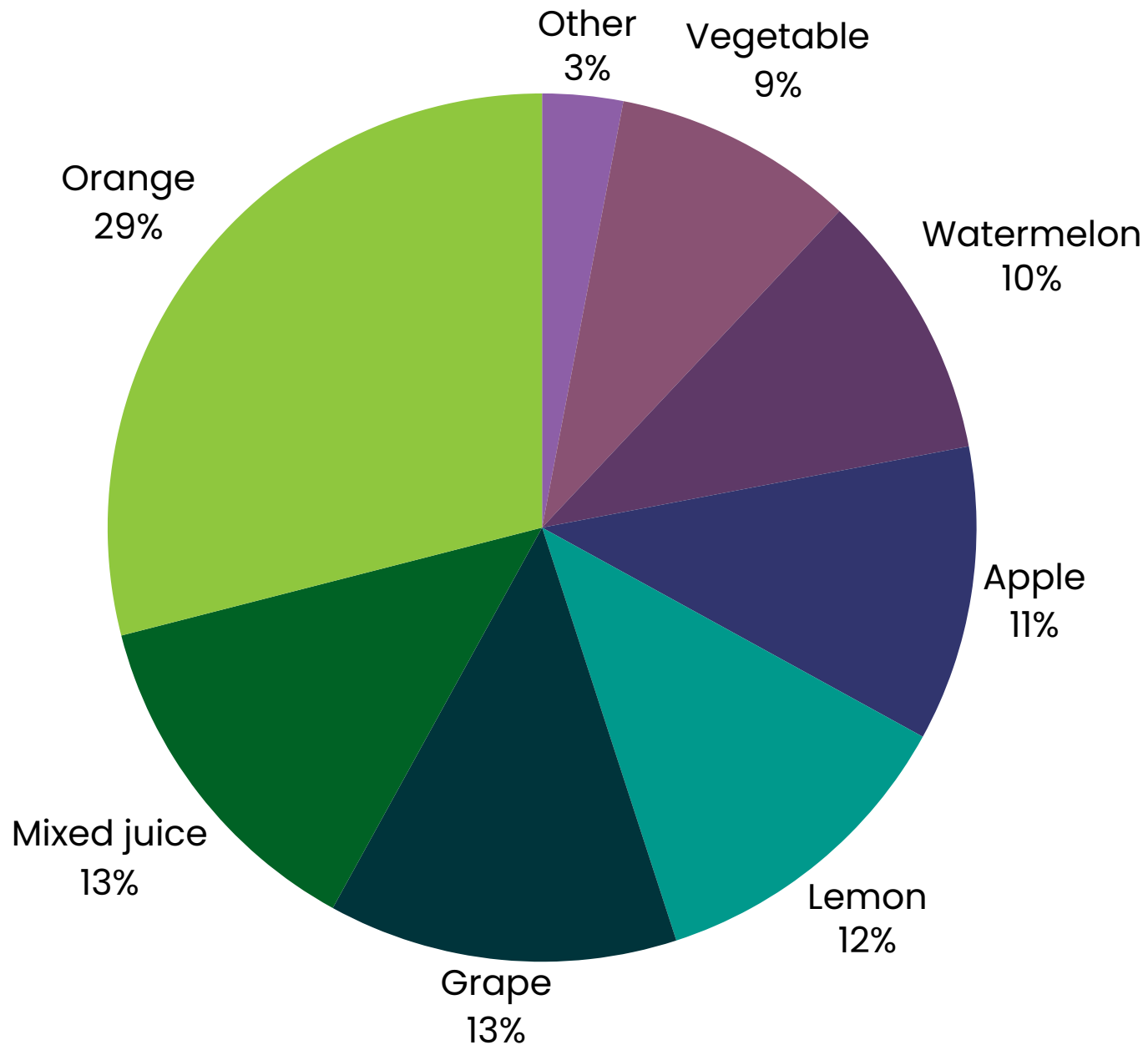
Supermarkets are an important sales channel for juice in China, with 44.4% of respondents purchasing juice from supermarkets, followed by convenience stores and online sales channels.

Figure 23: Juice purchase channel



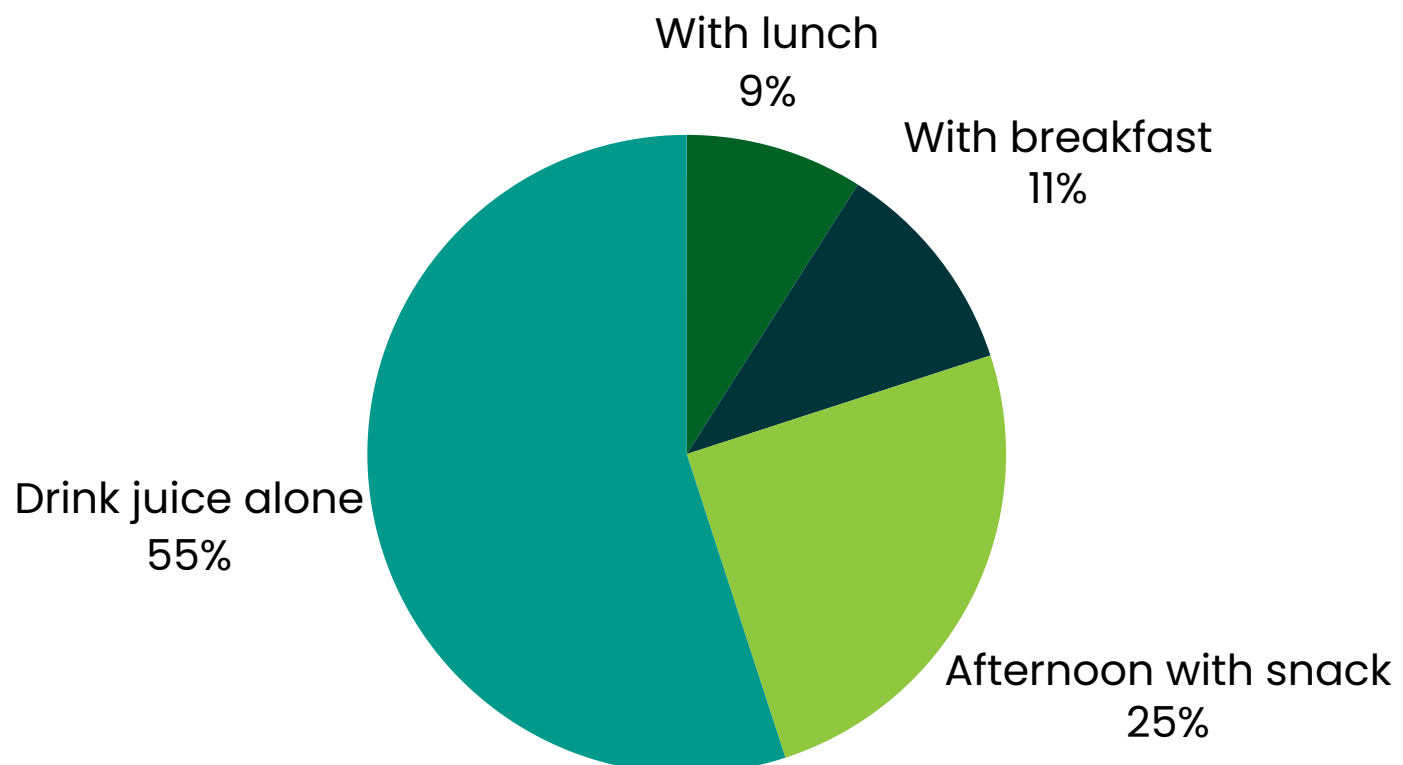
Almost 30% of respondents said they bought orange juice when they purchased a juice product. Mixed juice, grape juice, lemon juice, apple juice and watermelon juice are also popular juice products in China.

Figure 24: Juice type preference



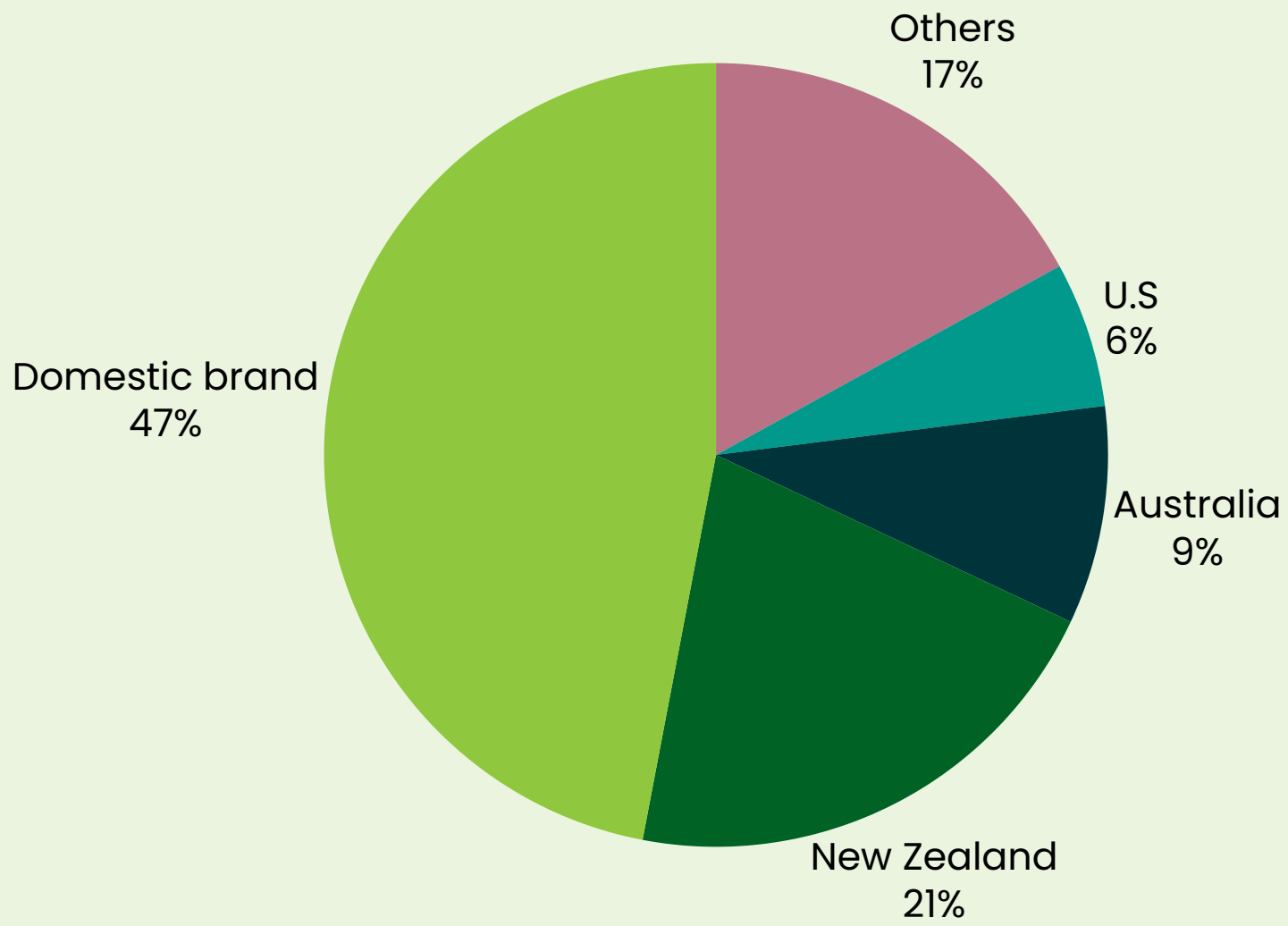
Over 50% of respondents usually drink juice on its own, while 25% of respondents said they preferred to drink juice in the afternoon with snacks.

Figure 25: Juice drink behavior



When choosing juice, 47% of survey participants expressed a preference for a product of domestic origin. A further 21% of respondents preferred New Zealand origin, 9% of respondents preferred Australia origin and 6% of respondents preferred US origin.

Figure 26: Juice origin preference



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END

China Juice Market Report 2024