



FRUIT MEETS VEGGIE

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Fruits meets Veggie – Refreshing Flavour Creations for Near Water Drinks

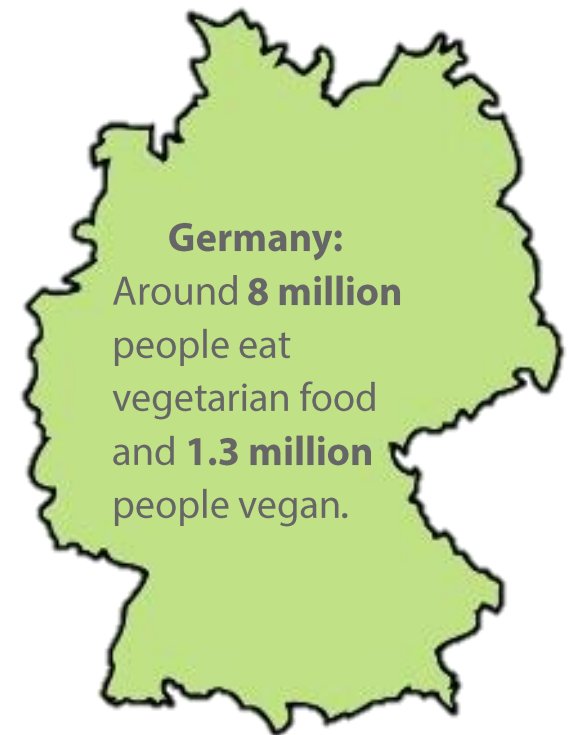
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Market- & Lifestyle Trends – The Veggie Hype

Vegetarian and vegan products offer enormous potential on a global scale.

Especially the German market for vegetarian vegan products is booming. Around **18% of new product launches** in the food and beverage industry in 2017 were launched on the German market.

Only the mega market **USA** is similarly innovative **with 13% of all new vegetarian and vegan product launches** in the food and beverage sector, closely followed by the UK with 11%.



Worldwide about 1 billion people are vegetarian or vegan. Furthermore, there are the so-called flexitarians, who mostly eat vegetarian food, but occasionally also consume meat products.

Market- & Lifestyle Trends – The Veggie Hype



Come to stay

- Plant-based products are no longer available exclusively in organic shops, but now have a **permanent place** in every supermarket.
- Especially young, open-minded consumer groups and in particular **the millennial generation** are driving product innovations in the market for vegetarian vegan food and beverages.
- According to Mintel, almost **one in five of 16-24 year olds** buys plant-based products.
- Worldwide new vegan restaurants are opening continuously, with a total of 161 purely vegan restaurants in Germany by 2016.

Market- & Lifestyle Trends – The Veggie Hype

Contemporary Vegan: Plant-based products are presented in an artful way and are shared by younger consumers in various social networks.

Interesting ingredients, new styles and colours give new pep to traditional vegetarian/vegan dishes.

The often very colourful culinary artworks are usually shared via Instagram, an ideal platform for aesthetic food photography.

Meanwhile you can find more than 60 million images worldwide in the social network under the hashtag vegan.



Market- & Lifestyle Trends – The Veggie Hype

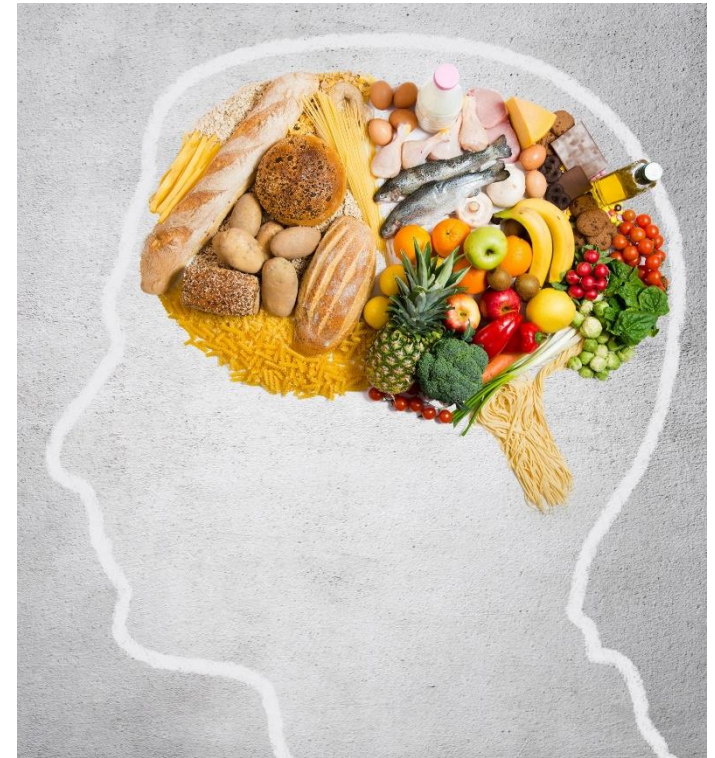
The age of thoughtful consumption

The ongoing **Health & Wellness megatrend** is **shaping the lifestyles** of millions of people worldwide.

Consumers strive for inner balance and holistic physical well-being.

Consumers have recognized that there might be an actual **correlation** between individual nutrition and physical health. This awareness encourages the consumer's demand for **natural ingredients**, simplified processing and transparency with a consistently full flavour.

The veggie boom is also caused by the growing health awareness of consumers. As a result, the demand for food and beverages that meet the changing approaches to life is also growing.



„Water on the Move“ – Near Water conquers the Shelves

The Health & Wellness trend is driving the **growing demand for water**, whether pure or refined with flavours or extracts.

According to a survey by the market research institute Global Data, **60% of respondents** stated that individual purchasing decisions for non-alcoholic beverages are significantly influenced by the impact of a product on **personal well-being and health**.

As a result of their usually **high sugar content**, **soft drinks** rarely meet consumer's demands for healthy, natural ingredients. This is why more and more consumers prefer the healthier and usually more cost-effective alternative of water.



„Water on the Move“ – Near Water conquers the Shelves



- For the majority of consumers, the purchasing of soft drinks has so far been primarily based on taste.
- Hydration and health awareness in turn influenced the purchasing decisions for water.
- However, **taste** is also becoming **increasingly important** in the water segment and offers **new opportunities** for manufacturers to bring unique, innovative products to the market.
- Beverage categories will be combined to create products that will enhance personal well-being but meet the **growing sensory demands of consumers at the same time.**

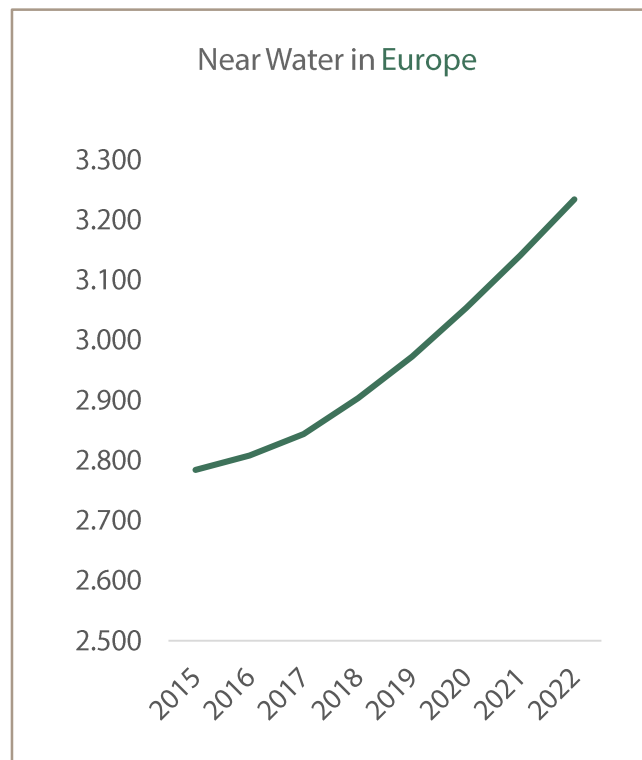
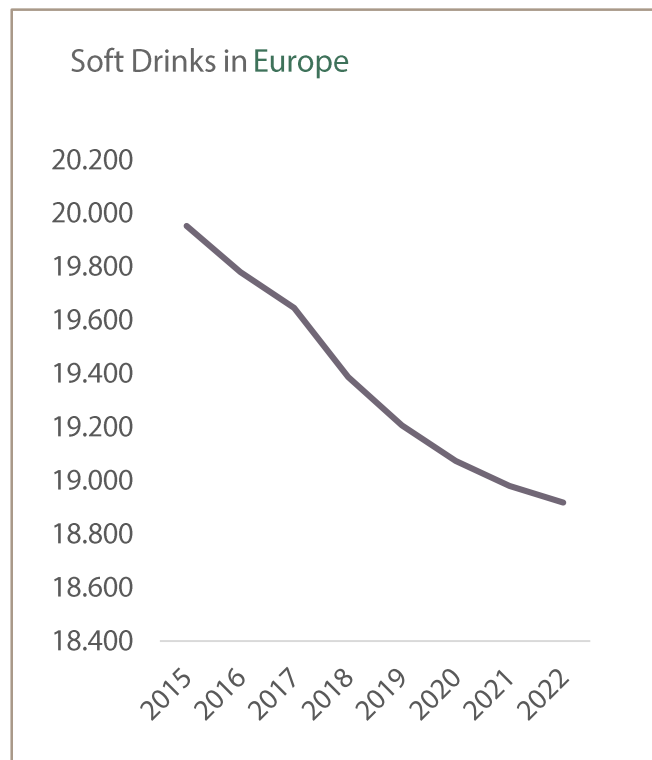
„Water on the Move“ – Near Water conquers the Shelves



- **Near Water**, also known as Flavoured Water, is typically **mineral water** (still or carbonated), which is enhanced with **flavours, extracts** and mostly also sweeteners.
- It is usually clear, may contain colouring agents and also contains a very low juice content in exceptional cases.
- Near Water creates an **excellent balance** between **taste, functionality** and **health benefits**.
- Young consumers in particular are **keen to experiment** with taste innovations in this segment.

„Water on the Move“ – Near Water conquers the Shelves

Off-Trade Volume (mio. litres) | Near Water vs. Soft Drinks // **Europe** (2015-2022)



16,2%

CAGR until 2022



Market Data – Near Water in Europe

New product launches in the near water segment // **Europe** (01/2015 – 04/2018)

Top Countries	Share (% of all NPD)
UK	21,1%
France	10,5%
Poland	10,0%
Germany	8,6%
Netherlands	6,8%
Czech Republic	5,0%
Norway	4,1%
Slovakia	3,8%
Spain	3,6%
Hungary	3,4%

Number of
New Launches:

1.000

Branded
76,6%

Private Label
23,4%

Launch Type	Share (% of all NDP)
New Product	44,7%
New Variation/Range Extension	30,9%
New Packaging	17,0%
Relaunch	6,8%
New formulation	0,60%

Market Data – Near Water in Europe

Top Flavours // **Europe** (01/2015 – 04/2018)



Lemon 9,6%



Lemon/Lime 5,6%



Strawberry 3,9%



Apple 3,6%



Orange 3,1%



Raspberry 2,4%



Peach 2,3%



Apple & Raspberry 2,4%



Lime 1,7%



Cassis 1,4%

Market Data – Near Water in Europe

Fastest Growing Flavours // **Europe** (01/2015 – 04/2018)



Pomegranate +400%



Pineapple +200%



Peach +200%



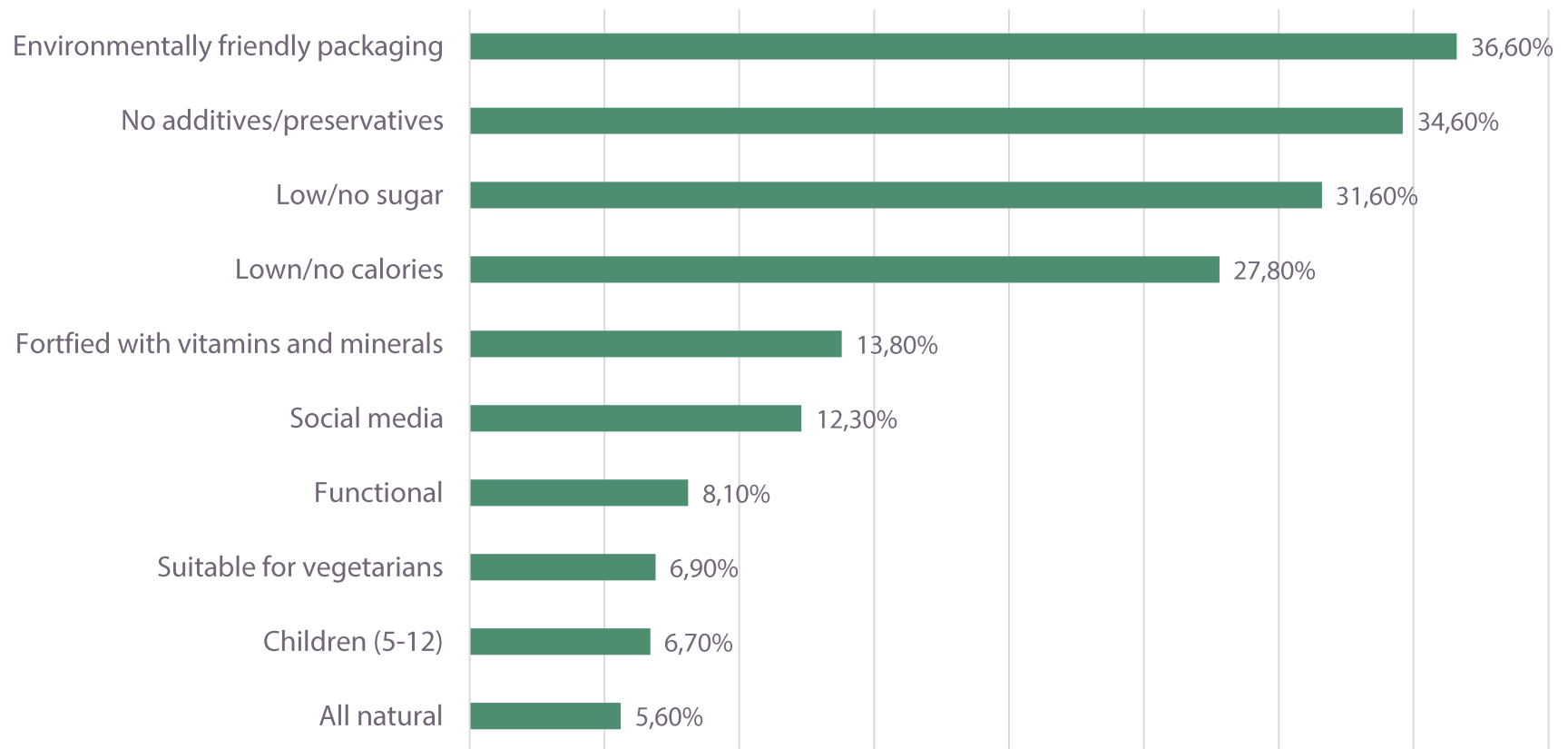
Lemon +175%



Apple +125%

Market Data – Near Water in Europe

Top Claims // **Europe** (01/2015 – 04/2018)



Market Insights – Near Water Products in Europe

1 | Vitamin Well | Product Range: Lemon-
Elderflower, Peach, Grapefruit,
Strawberry-Rhubarb, Lemon/Lime
| Sweden



2 | Ugly Water | Product Range :
Lemon/Ginger, Cucumber/Mint,
Raspberry/Mint, Blackberry | UK



3 | Rejuvenation Water | Product Range :
Ginger/Lemon, Apple/Mint, Spanish
Orange | UK



Market Insights – Near Water Products in Europe



1 | Zywiec Zdroj |
Product Range : Green
Tea/Pear, Green Tea/Mint
| Poland

2 | Lidl | Product Range :
Lemon | Romania

3 | Bai Antioxidant Water
| Product Range :
Ipanema Pomegranate
| UK

Market Insights – Near Water Products in Europe

1 | Marks & Spencer |
Product Range : Apple-
Elderflower | UK

2 | Zlatá Studna Dotyk
Kvetov | Product Range :
Lavender | Slovakia

3 | Voss | Product Range :
Cucumber/Lemon,
Tangerine/Lemon Grass
| Norway



Excursus – Fruits meets Veggie within the Juice Segment

The **Health & Wellness** trend and the continuing **veggie boom** have a sustainable impact on new product developments in the beverage industry. Smoothies in particular are regarded as **pioneers** for the use of **vegetable flavours** and **extracts** in beverages.



Meanwhile there are various smoothies, juices and juicy drinks on the market that contain **vegetables**.

A wide variety of vegetables make different health promises that are aimed precisely at the needs of consumers. Especially **exceptional taste combinations** such as kale, spinach & apple are becoming more and more popular.

Excursus – Fruits meets Veggie within the Juice Segment

New product launches in the juice segment // **Europe & US** (01/2015 – 04/2018)

Top Ingredients	Share (% of all NPD)
Carrot juice	13,6%
Beetroot juice	7,8%
Spinach	6,4%
Carrot concentrate	5,4%
Cucumber juice	4,5%
Tomato juice	4,3%
Cucumber	4,1%
Kale	3,8%
Black carrot extract	3,8%
Celery juice	3,3%

Number of
new launches:

4.420

Branded
77,9%

Private Label
22,1%

Launch Type	Share (% of all NPD)
New Variation/Range Extension	37,0%
New Product	33,7%
New Packaging	23,3%
New Formulation	5,3%
Relaunch	0,63%



Fruit meets Veggie

Get in touch with taste. Discover Bell's Refreshing Flavour Creations for Near Water Drinks.

Fruit meets Veggie- Refreshing Flavour Creations for Near Water Drinks

- **Intense taste profiles** with a constant quality - Bell's flavours give **still near water beverages** in particular a long-lasting and exciting taste.
- Use of **Natural X-Flavours**, as well as **Natural Flavours**, which are based on current consumer trends and requirements for clean labelling.
- All flavours are **vegan/vegetarian** and **free of allergens**.
- Suitable for **various beverage applications**, e.g. Near Water, Flavoured Water* and Carbonated Soft Drinks.
- **Innovative creations** that will invigorate the beverage market - the perfect combination of sweet fruit notes with the hearty flavours of fresh vegetables!
- **Extend** your **product portfolio** and create new taste experiences for your consumers.



Apple & Carrot

0550124 Apple Flavour

0490758 Carrot Flavour

°Brix refr. 4,0

as. Citric Acid g/l 1,0

*Ingredients: Water, Sugar, Natural Apple Flavouring, Acid:
Citric Acid, Natural Carrot Flavouring*

Fruity apple and sweet carrot - a taste experience as though from your own garden.



Pomegranate & Green Paprika

0550051 Pomegranate Flavour

0497386 Green Paprika Flavour

°Brix refr. 4,0

as. Citric Acid g/l 0,9

Ingredients: Water, Sugar, Acid: Citric Acid, Natural Flavouring

Tangy-sweet pomegranate meets aromatic, spicy green paprikas - a truly delicious combination.





Tomato & Mango

4500071 Tomato Flavour

3400015 Mango Flavour

°Brix refr. 4,0

as. Citric Acid g/l 0,9

Ingredients: Water, Sugar, Acid: Citric Acid, Natural Flavouring

The taste of sun-ripened tomatoes with the exotic sweetness of mango adds summer to the glass.



Cucumber & Lemon

3450107 Cucumber Flavour

0450100 Lemon Flavour

°Brix refr. 4,0

as. Citric Acid g/l 1,4

Ingredients: Water, Sugar, Acid: Citric Acid, Natural Lemon Flavouring, Natural Cucumber Flavouring

The refreshing cucumber flavour combined with a fresh sparkling lemon twist - the perfect drinking pleasure on warm days.



Black Currant & Beetroot

0410131 Black Currant Flavour

3450142 Beetroot Flavour

°Brix refr. 4,0

as. Citric Acid g/l 1,4

Ingredients: Water, Sugar, Acid: Citric Acid, Natural Flavouring

Tangy and fruity black currant, harmoniously arranged with the earthy notes of the beetroot ensures a real explosion of taste.



Cherry & Chilli

3450117 Cherry Flavour

3550055 Chilli Flavour

°Brix refr. 4,0

as. Citric Acid g/l 0,9

Ingredients: Water, Sugar, Acid: Citric Acid, Natural Cherry Flavouring, Natural Chilli Flavouring

Enjoy the fruity, sweet notes of cherry, ingeniously combined with the light spiciness of chilli.

Contact

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