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South China's thirst for U.S. fruit and vegetable juice keeps growing

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Report Highlights:

As the Chinese economy steadily grows, the fruit and vegetable juice industry follows suit. South China retailers seek healthy and nutritious juices to quench customer thirst. This prompts increasing demand for high-quality imported products. In 2007, the United States exported US\$6.5 million worth of consumer-oriented fruit and vegetable juices to China, up 43 percent from 2006. U.S. juice exporters face fierce challenges in the retail sector, especially from European, Southeast Asian and local producers, but opportunities knock for this \$28.4 million niche market. The total Chinese market for both domestic made and imported juices is worth a whopping \$7 billion, testament to growing affinity for juices.

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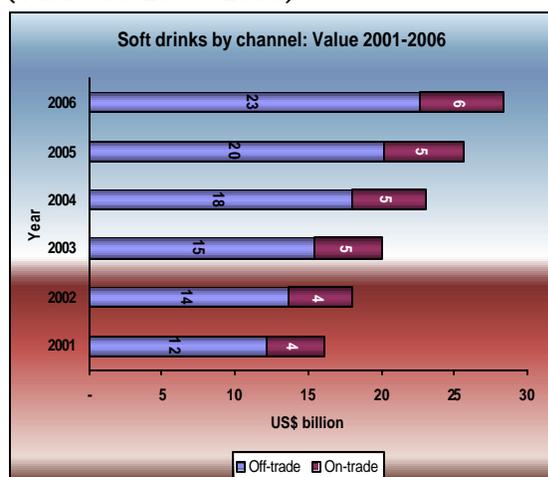
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I. What's happening in the juice market

China's continuous economic development helps boost the soft drink industry, including its subsector, fruit and vegetable juice. According to the *China Beverage Industry Association*, consumption of fruit juice and vegetable juice drinks account for 20 percent of the country's total soft drink market.

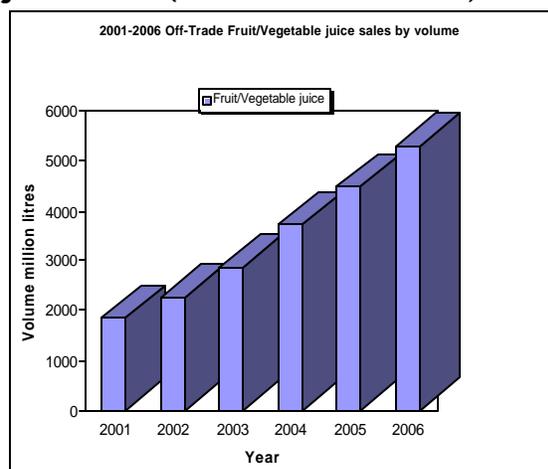
In 2006, 5.6 billion liters of fruit and vegetable juice were sold in China valued US\$7 billion (*Euromonitor*). Compared with 2001, juice consumption increased 187 percent by volume and 157 percent by value.

Chart 1: Soft drinks by channel
(Value CY 2001-2006)



Roughly 80 percent of soft drinks were distributed through "off-trade channels" (retail shops). The rest were through "on-trade channels" (pubs/bars). Juice is a subset of soft drinks. (Source: *Euromonitor*)

Chart 2: Off-trade fruit/vegetable juice sales (Volume CY 2001-2006)



Sales of juices in China keeps growing (Source: *Euromonitor*)

Total imported juice accounted for a small fraction of total juice retail sales revenue in China, but it is growing rapidly. In 2007, global juice makers shipped \$146.1 million worth of fruit and vegetable juices to China, up 47 percent from the previous year, and nearly triple 2002 sales.

Out of the total value of juice imports, China imported US\$117.7 million worth of frozen orange juice in 2007 for local mass production to satisfy increasing market demand for juices, mostly from Brazil (US\$78.4million), Israel (US\$30.8 million) and the United States (US\$1.3 million).

There is a gap between Chinese and U.S. data. However, both indicate rapid growth in 2007.

According to the *U.S. Department of Commerce*, the United States exported US\$6.5 million worth of consumer-oriented fruit and vegetable juices to China, up 43 percent from 2006.

In 2007, according to *China Customs*, the United States ranked third largest juice exporter to China (US\$7.2 million), after Brazil (US\$78.4 million) and Israel (US\$33.1million).

Brazil and Israel are two leading exporters of frozen orange juice to China market. Frozen orange juices are sold to large-scale juice producers in China.

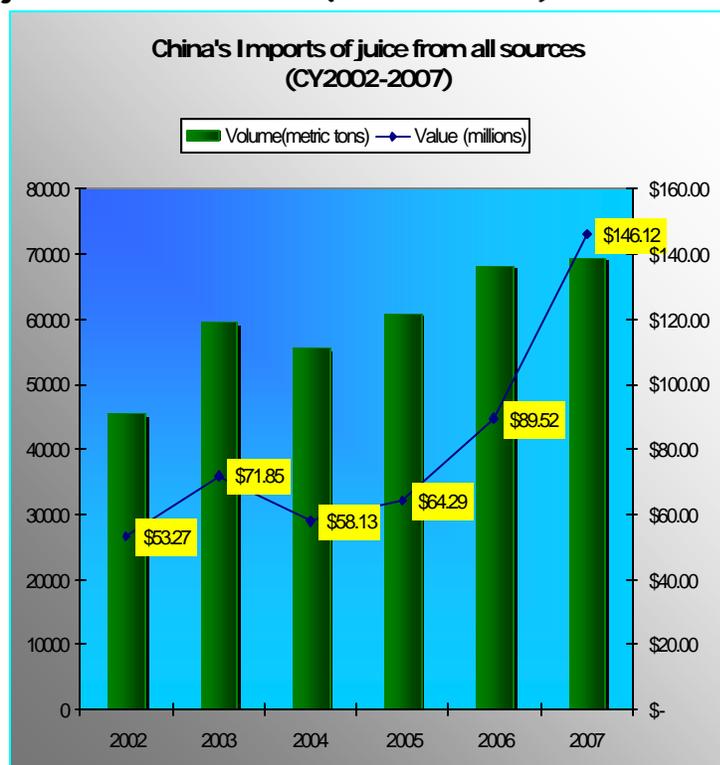
After deducting the total value of frozen orange juice, mainly for local mass production, the approximately \$28.4 million market consists of packaged juices and ready-to-drink imported juices. Competition is fierce. U.S. juice exporters face challenges in retail sector especially from Europe, Southeast Asian and local producers.

According to *China Customs*, in 2007, roughly one-third arrived at South China ports. However, many sources indicated that juice per capita consumption in China per year is still very low.

According to the *China Beverage Industry Association* and other sources, current per capita juice consumption in China is less than two liters; according to *Euromonitor*, off-trade fruit/vegetable juice per capita consumption in 2005 was 3.4 liters, and according to *Beverage Marketing*, the consumption was 6 liters in 2006 in China. (Note: "off-trade" is a term used by *Euromonitor* to describe the retail distribution channel)

Whatever the true number, all are much lower than that of developed countries.

Table 1: China's Imports of fruit and vegetable juice from all sources (CY 2002-2007)



China's imports of fruit and vegetable juice increased 174 percent within five years from 2002-2007

(Source: World Trade Atlas)

For example, fruit beverage per capita consumption in the U.S. was over 50 liters in 2006 (*Beverage Marketing*) and over 18 liters in Japan (*Nation Master/Euromonitor*).

Therefore, many industry-insiders believe there is a huge potential market in the juice business.

On the consumer end, the emerging affluent "middle-class" and fashionable "post-80's" have strong purchasing power, pay more attention to food safety and are willing to try new healthy products. Over the years, Chinese have shifted from drinking sodas to healthier juice.

According to *Euromonitor*, juices are classified as three major subsectors: 100 percent juice, nectars (25 to 99 percent juice) and juice drinks (up to 24 percent juice). (Refer to Appendix, Table 5 on page 24).

Booming retail channels throughout China help boost juice

industry development. Some 89 percent of fruit and vegetable juices are distributed through "off-trade" channels, mainly via hypermarkets, supermarkets and convenience stores as well as independent stores in China. Retailers attract not only expatriates but also increasing numbers of local consumers. In addition, the rapid development of hotels and restaurants in China also spurs.

China's juice market is growing rapidly and has already attracted many foreign investors. This helps boost development of the juice industry. Both multinational players (*Pepsi*, *Coca-Cola*) and Taiwanese companies (*Uni-President*, *Kang shifu*) have enjoyed good sales in other businesses. They noticed the juice market's promising margins and shifted gears to invest heavily in this sector in the hopes of gaining more market share.

This definitely enhances competition in the Chinese juice market. Earlier entrants such as national brand *Huiyuan* and many other local players have to fight mightily against these powerful giants.

High-value imported fruit and vegetable juice producers target high-end niches. As it has enjoyed a healthy image in the past three years, U.S. fruit and vegetable juice enjoy increasing demand. However, competition from European and South-Asian countries cannot be ignored.

II. South China's thirst for fruit and vegetable juice grows

A. General trends

South China is at the forefront of the nation's rush towards a developed market economy.

Guangdong province is located in the southernmost part of China and is home to major modern supermarkets and supermarkets. The Pearl River Delta Region, which includes Guangzhou, Shenzhen and its prosperous satellite cities in Guangdong province, is the key consumer market. (Note: Refer to GAIN report CH7821, *Retail annual report, that details the South China market, pages 34-43*) On the consumer end, southern consumers tend to follow consumption patterns of Hong Kong, Macau and other Southeast Asian countries. Japan and Taiwan, for example, have a big influence on South China.

South China's residents enjoy higher-than average incomes, thanks to the region's rapid economic development. Their consumer spending power is on the rise. Its middle-class can afford imported foods.

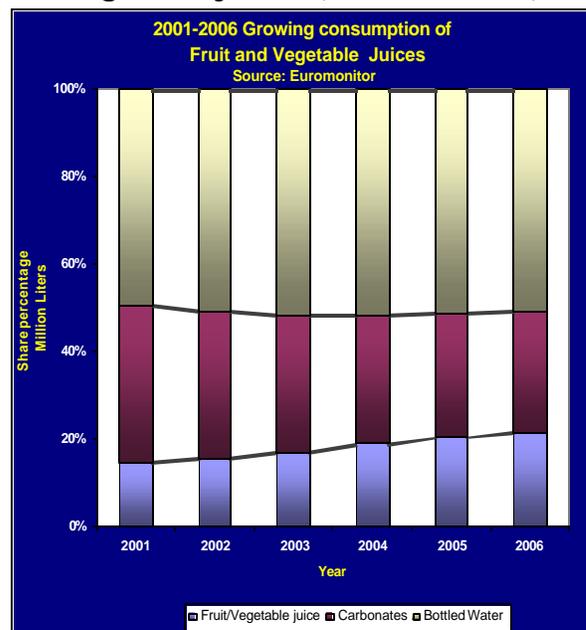
This group also has a strong preference for imported fruit and vegetable juice products due to reputation for high quality, as well as health and food safety reasons. With increasing disposable incomes, the capacity to buy higher value goods and services means U.S. fruit and vegetable juice producers need to take note of this significant market of the future.

Although South China consumers tend to prefer fresh fruit to juices, fruit and vegetable juices saw the most dynamic sales growth in recent years.

South China Facts

- Guangdong has the highest GDP in China (US\$349.39 billion)
- South China (Guangdong, Fujian, Guangxi, Hainan & Hunan provinces) officially has 247.6 million people, about 19 percent of China's total population. (Unofficially it has 267 million people.)
- The growth rate of total retail sales of **Pearl River Delta** in 2006 was over 15.3 percent.

Chart 3: Growing consumption of fruit and vegetable juices (CY 2001-2006)



Juice sales made up 20 percent of total soft drinks category.
(Source: Euromonitor)

In 2007, some 1.6 billion liters of fruit and vegetable juice were distributed by off-trade channels in South China. Chilled fruit and vegetable juices had strong growth in first tier cities such as Guangzhou and Shenzhen. In addition, there is an increasing demand for high-quality imported juices in South China. 100 percent natural juice and juice nectars mixtures with multivitamins account for a small fraction of China’s juice market but are gradually becoming popular.

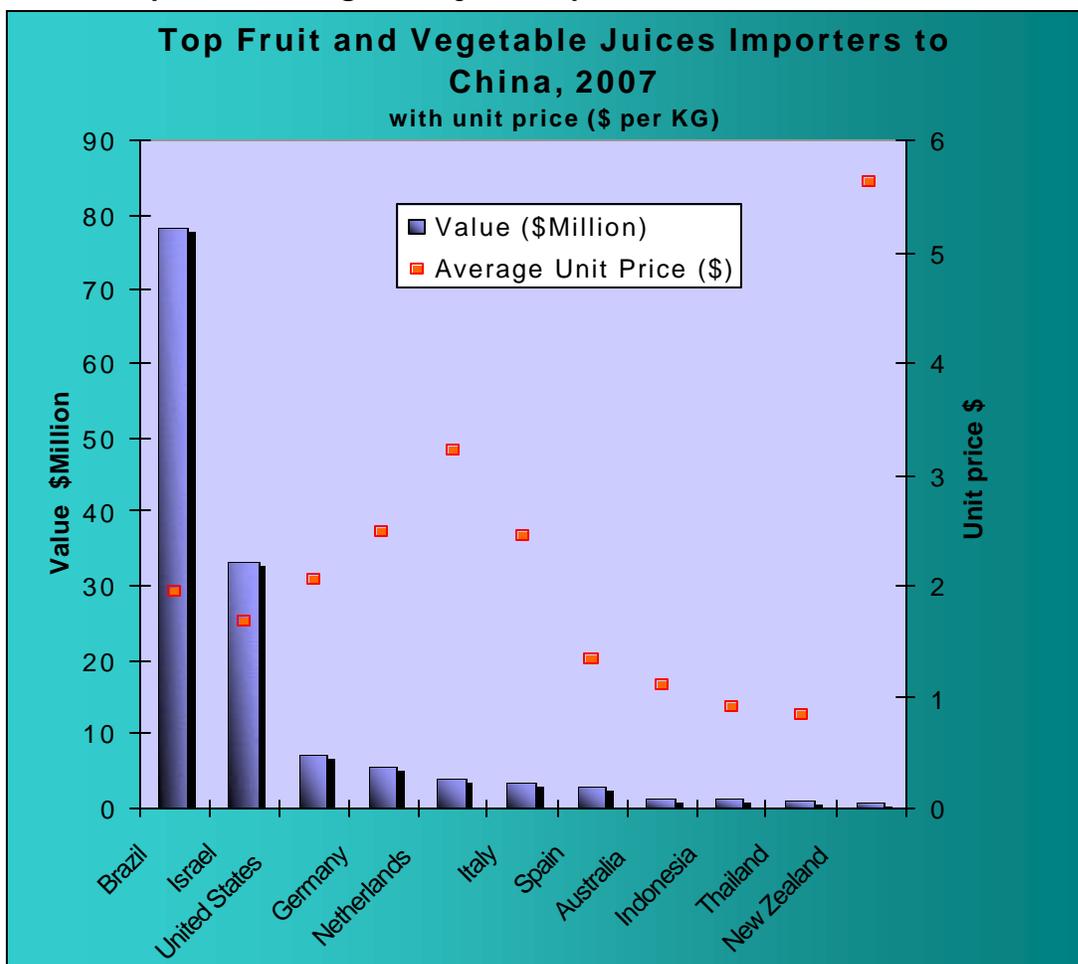
Each year, on average, over 20 percent of all imported fruit and vegetable juices entering China arrive at the ports of South China. (Refer to Table 4, page 16)

Table 2: Fruit and vegetable juice exported from U.S. to China
(CY 2004-2007)

	2004	2005	2006	2007
Value (Million US\$)	3.19	4.15	4.55	6.52
Volume (KL)	3,531.2	6,704.5	4,507.6	6,045.8

(Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics)

Table 3: Top fruit and vegetable juice exporters to China, CY 2007



The U.S. ranked third largest exporter of fruit and vegetable juice to China, after Brazil and Israel. Brazil and Israel mostly export frozen orange juice to China (Refer to Appendix, Table 4, and page 22)
(Source: WTA, China Customs)

B. Joint ventures, mergers & acquisitions

Many of the global juice giants have already established firm footholds in the Guangzhou and Shenzhen markets such as **Pepsi** and **Coca-Cola**. Having achieved early positive results in other businesses, they shifted gears and target the juice sector.

A few years ago the biggest Japanese juice maker, **Kagome**, opened a production plant in Hangzhou in 2005 and launched four pure juices in South China's most affluent cities of Shenzhen, Guangzhou and Dongguan. It mainly targets urban consumers with higher purchasing power.

In addition, French multinational **Danone** bought a stake in one of the few national brands **Huiyuan**, and **Del Monte Pacific** is also involved in the market through its fully owned subsidiary **Great Lakes**.

C. Market competition

In South China, there are several types of brands: multinational, of Taiwan background, and domestic national brands. In addition, there is an emerging market for high-value imported juices around the world although for these, brand is less important. (Refer to Appendix, table 6-9, pages 25-28)

1. Multinational brands

Multinational players such as **Pepsi**, **Coca-Cola**, have achieved early positive results in carbonated drinks and have shifted gears and targeted promising juice market in China.

By setting up joint-venture production facilities locally and cutting production costs, making substantial advertisements through mass media and conducting in-store promotion activities as well as targeting niche markets, their brands such as **Dole**, **Minute-Maid**, **Tropicana**, and **Ooo** gradually have become well known in China. Other multinational brands include **Nestle Orange-C** and **Kirin**.

2. Taiwanese brands

Companies such as **Uni-President**, **Kangshifu** originally were in the noodle business and have set up broad distribution channel in China. They have recently expanded their business into juices market.

3. Domestic national/local brands

The earliest juice producer was **Huiyuan**. Established in 1992, **Huiyuan Group** has over 20 production facilities and a number of fruit planting bases around the country. It was the first to promote juice's healthy benefits. "Drinking **Huiyuan** leads you on a healthy road" is a well known saying among Chinese. Last year, this company received over US\$200 million from overseas investment.

Opportunity for U.S. juice producers and exporters

- Continuous economic development
- Booming retail sector
- Local supply gap
- Reduced tariff
- Favorable health image
- Increasing disposable income
- Increasing demand
- Changing consumption patterns



"Huiyuan" 100 percent juices in South China
(Source: ATO Guangzhou)

The French food and beverage giant *Danone* owns a 22.2 percent share in *China Huiyuan*. The marriage will help *Huiyuan* integrate sales channels and supply chains as well as upgrade production technology.

In addition to *Huiyuan*, other available brands such as *Wahaha*, *Sunkist* and *Mr. Juicy (Watsons)* can also be found on most retailer shelves.

Other juice manufacturers in China include: *Nongfu Orchard*, *Ting Hsin*, *Great Lake*, *Tang*, *Bosun*, *Kangshifu*, *SPSE(xiapushaier)* and *Lolo*.

4. High-value imported fruit and vegetable juices

High-value imported fruit and vegetable juices only target niche markets in the Pearl River Delta area such as Shenzhen, Guangzhou and affluent coastal cities in Fujian province, specifically consumers with higher incomes. The best selling venues for these high-price products are high-end supermarkets such as *Sams' Club*, *Ole supermarket* as well as independent imported food stores such as *Corner's Deli*, *Gourmet Fine Stores*, *Oliver Supermarket* in Guangzhou.

D. Emerging market trends

There is a niche market for U.S. fruit and vegetable juice in Southern China.

U.S. fruits from California and Florida have already enjoyed a positive market image in South China. Consumers are ready to accept high-quality healthy U.S. fruit and vegetable juice.

There is a supply gap between the increasing demand and quality juice material in China. Many local large-scale juice producers imported substantial frozen orange juices from U.S. and other countries.

China reduced its tariff several times on frozen orange juices, from original 75 percent to 35 percent to only 7.5 percent.

1. Health/ beauty/fashion/ organic & 100 percent natural juice

According to research completed by China's *Ministry of Commerce*, more than 60 percent of the country's 562 million city dwellers are willing to pay more for produce certified safe, green or organic.



Popular U.S. brands include V8, Ocean Spray, Snapple, Welch's, and Treetop



Small packages are white collar favorites



South China consumers also like uniquely shaped packaging as well as eye catching colors

(Source: ATO Guangzhou)

Since consumers are increasingly concerned about health and food safety, there is growing demand for natural juices. Before, very few consumers in China were even aware of 100 percent natural juices and were misled by so-called “juices” that were really fruit flavored drinks.

There is a potential market for imported natural juices in South China, including American brands that have a positive healthy image.

According to talks with food and beverage brokers and visits of various high-end retailers in South China, Post concluded that more consumers increasingly look for high quality products. For them, drinking juices is an effective, convenient and natural way towards health, beauty and fashion.

Organic juices, mixtures with multivitamins and natural juices are considered healthy.

2. Convenience/ Ready to drink & PET packages

Large cities such as Shenzhen and Guangzhou are home to an increasing number of young adults seeking careers. They work longer hours, commute greater distances and eat out more.

For them, convenience is quite important. Ready-to-drink, easy to carry are becoming important attributes when these busy white collars make their purchasing decisions. There is increasing demand for juice in PET (polyethylene terephthalate) packages. A PET container is a safer, lighter weight package that is both convenient and attractive. For example, 250ml PET package and 280ml tin package juice are quite popular in convenience stores such as 7-Eleven.



*Colorful juice display at Jusco supermarket, including Dole, Huiyua, Mr. Juicy and other imported imports.
(Source: ATO Guangzhou)*

3. Flavors & taste preferences: a variety of choices

In addition to the most traditional and popular orange, apple and grape juices, there are plenty of choices including peach, mango, strawberry, banana, cranberry, blueberry, guava, kiwi, sugar cane, pineapple, pomegranate and papaya. Fruit and vegetables nectar mixtures with multivitamins and fruit nutrients are also getting popular. The most popular vegetable juice includes tomato and carrot.

4. Packages: convenience packaging & family size

Packaging may be made of paper (brick-shaped), glass, tin or metal and PET. Packages of 1L and 2L are good for family consumption, while 250ml, 280ml and 330ml packages are the best choices for busy white collar professionals. South China consumers also like uniquely shaped packaging as well as eye catching colors.



*Uniquely packaged “Qoo” juice from Japan
(Source: ATO/GZ)*

E. Best venues for promoting U.S. fruit and vegetable juice in South China

The retail channel is the major channel for promoting U.S. fruit and vegetable juice.

1. Hypermarket/supermarket

The best venues for imported juice and drinks are *Sam's Club* and the *Ole* store in *Mix-City*. *Jusco* and *Metro* also promote U.S. juice.

- Sam's Club** beverage sales are about 35 percent of total food sales. Among all the beverages, 80 percent are imported while the rest are purchased locally. This is significantly different from other retailers that typically import 30 percent and source the rest locally. According to the manager, this year *Sam's Club* set its new marketing strategies: **organic, imported, environment-friendly and food safety**. Although there is no official data, it is believed that juices and drinks account for 2 percent of total store sales in *Sam's Club*. 100 percent juices and juice drink beverages are new selling points.



Imported juices available in Guangzhou
(Source: ATO Guangzhou)

- Ole (Mix-city)** targets high-end consumers, including expatriates and white collar professionals. According to the *Ole* manager, local consumers are shifting from carbonates to juice drinks and nectars with pulp and fiber; there is also NFC (not from concentrate). In general customers aren't yet fully aware of 100 percent juice. Prices are high for such products so it occupies only a small market niche.

2. Independent import product food store

According to industry-insiders, 30-40 percent imported fruit and vegetable juice are distributed through emerging independent import product food stores. Many foreigners frequently pay visits, as do some Chinese consumers. In Guangzhou, for example, **Corners' Deli** has five outlets. In its *Tianhe CITIC* store, you can find over 30 SKU's of imported fruit and vegetable juice from all over the world. In addition, **Oliver store** and **Gourmet Fine Food Stores** in Guangzhou also sell U.S. juices.



Orange, apple and mixture juices imported from Portugal are available at Corners' Deli
(Source: ATO Guangzhou)

3. Convenience stores:

- 7-Eleven** has taken the lead in the South with more than 400 outlets concentrated in Guangzhou, Shenzhen and

neighboring cities like Dongguan and Zhuhai. In 2004 *Dairy Farm* began a joint venture in Shenzhen and since then has opened 100 stores as a franchise operation in which they hold a 65 percent interest.

- **C-store:** Taiwan-based *XiShiduo (C-Store)* has 76 convenience stores in the Guangzhou area. Most of them are located in up-market communities. Management have recognized the potential for stocking imported items and recently placed prominent point of sale displays promoting “imported items” in 69 of its stores. Imported items account for 5 percent of their total sales. Origins of imported products are marked with their national flags. Plans are underway to establish a branch office in Shenzhen and open more stores there along with possibility of adopting a franchise management approach.

4. HRI channel

Various high-end hotels and restaurants (for example *Shangri-la, Sheraton*) offer high-quality juices such as 100 percent premium natural juices or fresh squeezed juices. Juice prices are higher, and volume is smaller.

Interestingly, one of the key juice importers told Post that he believed Ocean Spray’s cranberry juice was most popular in bars where bartenders value its sweetness to balance out the sour taste of alcohol for cocktails.

5. Internet business

The internet is another emerging distribution channel for imported juices. Consumers may place orders such as *Dole* juices via internet and receive home delivery service. For selected items, consumers have to place a minimum order value or volume.

III. Exporter Advice

With increasing concern for health and quality-lifestyle, many industry-insiders believe there is big potential for U.S. origin juices. In order to enter China, U.S. exporters will meet many challenges. How to enter is the biggest challenge for many U.S. exporters.

A. Strategy I: for big companies

Big companies may follow examples set by *Pepsi* and *Coca-Cola* as well as apply similar marketing strategies such as:

- Close the cost gap
- Add products and channels
- Bring local brands on board

Individuals with higher disposable incomes tend to be attracted to international brands and respond quickly to advertising and brand promotion initiatives.

Challenges for U.S. juices producers and exporters

- Keen competition
- Taste preferences
- Higher cost
- Lack of cold storage
- Limited shelf life
- Limited distribution

Documents required by Chinese customs for imported food and beverages

- Sales contract
- Full set of original bill of lading
- Commercial invoice
- Packing list
- Certificate of origin signed by official
- Certificate of Quality
- Declaration of no-wood packing material/ certificate of fumigation/ phytosanitary certificate signed by official
- Insurance policy for 110 percent of the invoice value showing claims payable at destination and insurance debit note
- Chinese label of food or drink certificated by Chinese Commodity Inspection Bureau (at least three samples for application of Chinese label)

Some Chinese consumers are willing to pay more for premium world-class brands. However, in order to break into the mass market quickly, many juice players found that it was critical to manage cost and offer cheaper price products. Companies using local suppliers can close the cost gap. For example, **Dole** reduced expenses by manufacturing locally. Then it added products and expanded channels by investing on promotional activities and advertising.

B. Strategy II: for small or medium sized U.S. juice exporters

It makes sense for many U.S. brands, because of cost structures, to start at the top and target niche markets first. It is essential to:

- Understand the market
- Be aware of import procedures
- Select an appropriate partner
- Construct a detailed marketing plan
- Work closely with local key retailers
- Work closely with ATO offices to launch in-store promotions

Recently ATO Guangzhou staff visited several key retail stores and talked with retail managers. Subsequent to these visits, Post conducted a product survey with assistance of a local distributor. Considering potential market growth, these retailers were eager to introduce more U.S. origin juices varieties. During the retail visit, Post found that consumers have diversified flavor, taste and package preferences.

A new trend is shifting to mixed fruit and vegetable juices with multivitamins. According to retail managers, nectars with higher content of pulp and fiber as well as 100 percent natural juices are becoming popular.

In addition to orange and apple juices, there are many other varieties available in the market. Locally produced products/brands are much cheaper than the imported juices. For example, in Feb 2008, **Dole** 100 percent orange from concentrate juice (one liter package) was selling in Guangzhou (*Jusco*) at \$1.40 (RMB10.80) and **Huiyuan** 100 percent juice at \$1.80 (RMB12.80); while imported juice range is from \$2.00 to \$10.00 per one liter package.

U.S. origin juices enjoy a positive healthy image in South China. From the data collected during the retail visit, Post also noted that the unit retail prices of U.S. origin juices were reasonable when compared to competitors from European countries (price ranged from \$1.00 to \$6.00 depending on juice content, taste and package size). For example, the retail price of blueberry juice from Germany was about \$10.00 per one liter bottle.) However, the unit prices of Southeast-Asia were more competitive. (*Refer to the Appendix, Table 1, 6, 7, 8 and Table 9 regarding product origin, price and taste*)

Therefore, U.S. exporters should pay more attention on packaging (design/size options) and taste as well on promotional marketing activities. In addition, there is emerging demand for private label products. Taking this into account, U.S. juice exporters may consider a private label marketing strategy.

One of the effective ways to promote U.S. origin juices is to work with retailers and arrange in-store promotions.

In the past years, Post worked closely with local retailers to jointly promote American food products, including juices. In December 2007, with ATO Guangzhou office's support, an "American Food Festival" featuring 150 SKUs of U.S. food products was launched by one of

the local retailers in Zhongshan. During the promotion, U.S. origin juices and drinks were warmly welcomed by local consumers. According to the top management of this retailer, they would rather carry imported juices that are actually more healthy and natural.

In addition, in 2006, Post also worked with leading Japanese supermarkets and held an American Food Festival in its 11 supermarkets. It reported healthy sales during this two-week promotion, up 30 percent from the previous year.

In 2006, to upgrade its supercenter stores' image, *Wal-Mart China* jointly held an American Food Festival in its 32 selected high-profile stores in 17 cities with the support of the ATO offices last summer with resulting favorable sales.

However, retailers often encounter problems in promoting imported food products as there is a lack of in-store manpower (the common practice in South China: suppliers are often required to provide products as well as promoters to launch in-store promotional activities) , unstable supply, insufficient on-spot tasting and lack of demonstration activities by suppliers.

C. Other Entry Tips

- **Logistics:** Often retailers are unwilling to purchase these high-value products on their own. Instead, they prefer to sign contracts with local brokers or importers to reduce risk. In so doing, retailers can cut both operating and purchasing costs.

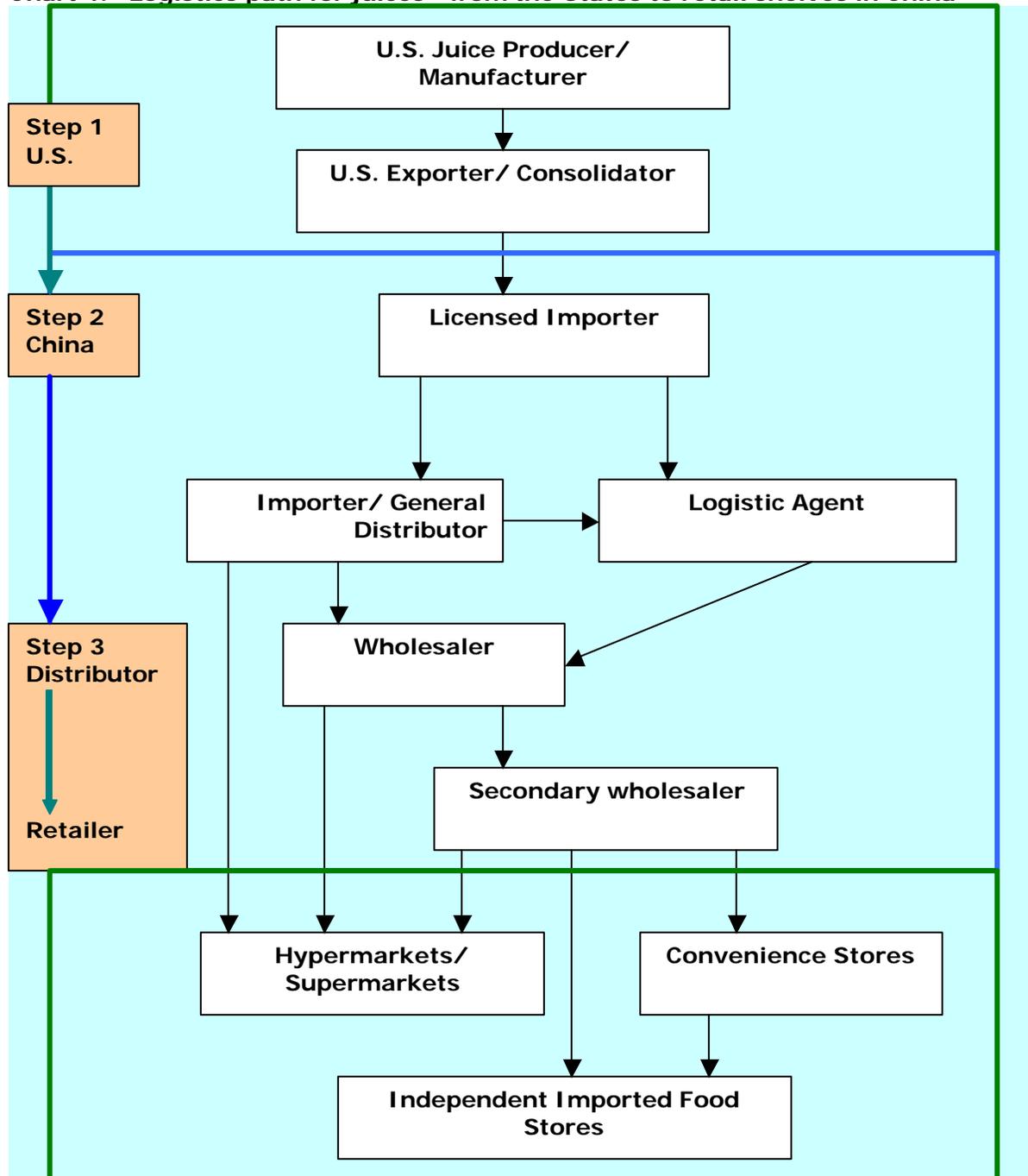
Therefore, it is essential for U.S. juice producers/exporters to find a qualified business partner in China, who should have good relationships with key retailers in South China. It is also important to identify if this potential partner really has influence on marketing high-value consumer products.

In addition, shelf life is a main issue that concerns both retailers and distributors or importers. Retailers normally require that imported food products sent to retailers should have two-thirds of its expiry date left. Therefore distributor/importer of U.S. juices should be able to handle import facilities such as shipping arrangements, custom clearance and warehouse distribution on time. In conclusion, it is recommended that frequent and effective promotion by distributors/importers will greatly enhance sales.

This is the logistic path, from the States to Chinese retail shelves:

1. The U.S. juice producer provides product to the U.S. exporter. Acting on the Chinese importers' purchasing orders, U.S. exporters arrange with logistics providers to consolidate shipment to a key trading port.
2. The licensed importer arranges customs clearance and documentation (this takes two to three months from U.S. warehouse to China wholesaler warehouse). Often, importers are also distributors for mainland retailers who utilize close relationships to help clear customs and transport goods to retailers.
3. Generally speaking, retail management is still in the early development stage in China. It makes sense for U.S. exporters to choose the distributor wisely.
4. A good distributor has experience and strong store management relationships to ensure premium shelf placement and strategic retail floor planning among leading retailers in mainland China.

Chart 4: Logistics path for juices - from the States to retail shelves in China



- Labeling** imported processed fruit and vegetable juices to be sold retail must be done according to Chinese government specifications. Such labels must be affixed to each package of the imported product prior to entering the country. All the information on the label must be in Chinese and include the following:

1. Commercial/brand name;
2. Product description;
3. Net weight/ volume ;
4. Ingredients;
5. Country of Origin;
6. Date of production;
7. Expiry date;
8. Importer's name, address;
9. Producer's name, address;
10. Special warning

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A sample 'stick-on' label for American juice above versus one especially printed for an Australian brand below.



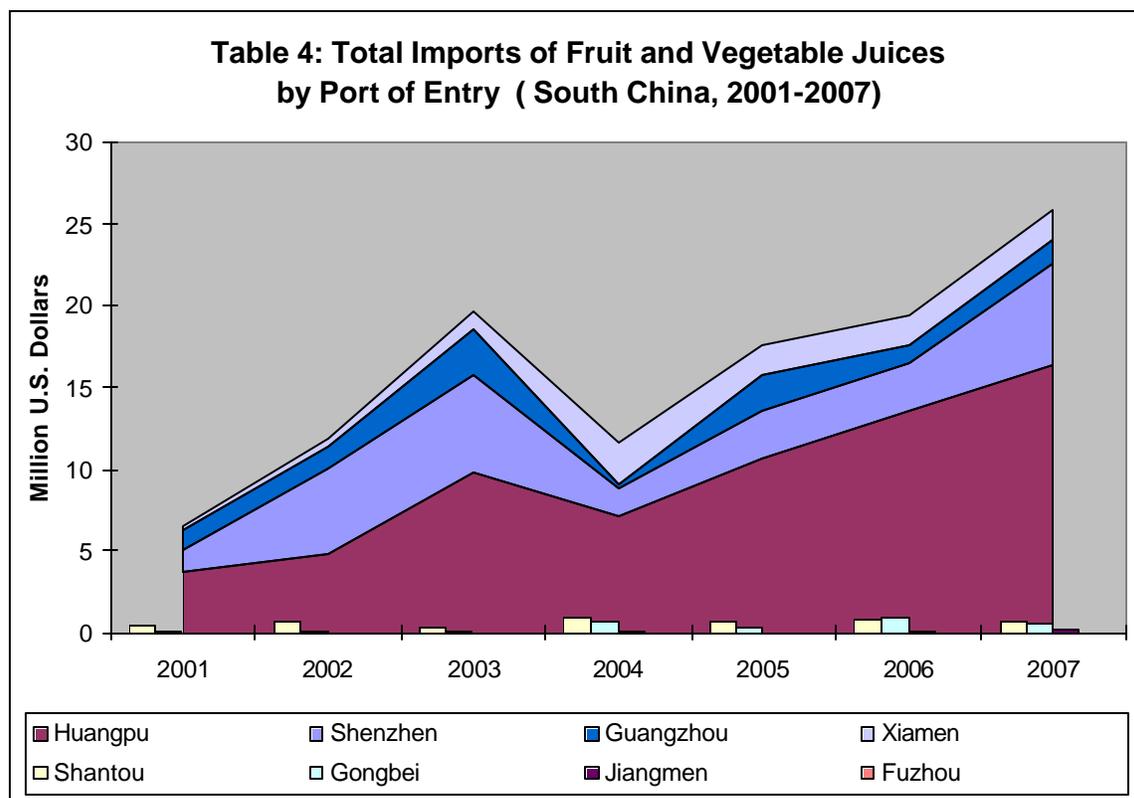
• Taxes and Tariffs

In addition to tariffs, China has a 17 percent value-added tax (VAT). Chinese Customs collects the VAT on foreign transactions upon entry of the merchandise into the country. Some of the Chinese companies do not have direct import-export authority. Their normal practice is to hire Customs brokers to help facilitate Custom clearance and all other formalities, these customs brokers then use the total transaction figure to calculate their fees, which are usually 2 to 3 percent, on average, plus any storage and handling fees. *(Please refer to Appendix, Table 3 on page 22)*

• Major Ports

In South China juices enter through Huangpu, Shenzhen, Guangzhou, Shantou, Gongbei, Jiangmen and Xiamen ports. As indicated in the chart below, most enter Huangpu Port.

Table 4: Total Imports of Fruit and Vegetable juice by Port of Entry (CY 2001-2007, South China)



(Source: China Customs)

IV. Conclusion

Table 5: Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis

<i>Strengths</i>	<i>Weaknesses</i>
U.S. products are regarded as high quality and manufactured with high safety standards.	The cost of many U.S. products is more expensive than local counterparts. Competition is keen from Europe and South-east Asia.
South China consumers spend 36 percent of their income on food.	Overall incomes remain low, with imports selling mainly to higher income groups.

Western foods are more widely available than ever and growing in popularity with consumers.	Lack of close relationships between store managers and many local distributors.
Incomes are growing rapidly in second and third tier cities, creating a whole new range of opportunities.	Consumers are price sensitive, and often unwilling to risk spending money on unfamiliar products without trying them first.
The number of qualified distributors for imported food on the mainland is growing, along with volume of direct exports	Many U.S. companies have established plants in China, manufacturing their products in China with Chinese ingredients.
<i>Opportunities</i>	<i>Threats</i>
Consumers are interested in new tastes and like innovative packaging.	Distribution and logistics remain underdeveloped outside of the largest urban centers, making distribution of imported products to interior cities difficult.
Many U.S. brands are widely recognized and respected in China's major urban markets.	Lack of knowledge about U.S. juice products makes consumers hesitant to buy. Some consumers insist on eating fresh fruit instead.
China's entry into the WTO reduced tariffs on a wide range of imported products, including juice products.	Chinese labeling regulations limit access to the market. Enforcement of regulations is haphazard, creating confusion for exporters.
Rapid growth in retail chains has created the potential for bulk sales, with consequent improvement in pricing and handling.	Many U.S. exporters continue to rely on gray market channels, reducing level of contact with end users and understanding of the market.

South China has a potential market for fruit and vegetable juices, however, the competition here is fierce. U.S. juice products may encounter great opportunities as well as challenging problems. In general, it is important to conduct taste tests locally to gauge the market's response to new flavors and packaging design before launch. Leveraging strong distributors as your key channel is crucial for U.S. exporters. This approach would ideally involve the following steps:

1. Market research analysis to identify key markets (which cities and which retail outlets best reflect your product's target customers).
2. Capability to negotiate with ideal retailers and gain best shelf placement
3. Point of sale displays that attract target customers
4. In-store promotions to raise awareness and encourage taste testing with trial offers as the early adoption phase in building your brand.

To best manage this process, a realistic marketing plan needs to be prepared to reflect the important steps identified above to ensure early and longer term success.

V. Post Contact Information

For further information about the China market, as well as updates on upcoming events and activities, visit our website at www.usdachina.org or contact the following:

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VI. Charts and Tables

Charts:

- Chart 1: Soft drinks by channel (Value 2001-2006)
Source: *Euromonitor (page 3)*
- Chart 2: 2001-2006 Off-trade fruit and vegetable juice sales by volume
Source: *Euromonitor (page 3)*
- Chart 3: Growing consumption of fruit and vegetable juice (2001-2006)
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- Chart 4: Logistics path for juices – from the States to retail shelves in China
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Tables:

- Table 1: China's imports of fruit and vegetable juice from all sources (CY 2002-2007)
Source: *World Trade Atlas (page 4)*
- Table 2: Fruit and vegetable juice exported from U.S. to China, CY 2004-2007
Source: *Department of Commerce, U.S. (page 6)*
- Table 3: Top fruit and vegetable juices exporters to China, CY 2007
Source: *WTA, China Customs (page 6)*
- Table 4: Total imports of fruit and vegetable juice by port of entry (South China, 2001-2007)
Source: *China Customs (page 16)*
- Table 5: SWOT analysis

VII. Appendix

Table 1: Imported fruit and vegetable juice product information

Brand name	Origin	Package	Retail Price (RMB)	Retail Price (US\$)
Bravo orange juice	Austria	1x1L	? 32.60	\$4.35
Bravo orange mixture (orange + peach+ other)	Austria	1x1L	? 33.60	\$4.48
Bravo mix(pineapple + sweet melon)	Austria	1x1L	? 31.80	\$4.24
Bravo w/ Vitamin.A.C.E(orange+lemon+carrot)	Austria	1x1L	? 31.80	\$4.24
Bravo multivitamin (7fruits)	Austria	1x1L	? 31.80	\$4.24
Pfanner 100 percent sugar free orange juice w/pulp	Austria	1x2L	? 42.50	\$5.67
Pfanner Blutorange	Austria	1x2L	? 39.80	\$5.31
Pfanner Apfel 100 percent sugar-free apple juice	Austria	1x2L	? 42.50	\$5.67
Malee 100 percent guava juice	Thailand	1x1L	? 14.80	\$1.97
Malee 100 percent Tangerine orange juice	Thailand	1x1L	? 18.80	\$2.50
Malee with mixed 100% carrot mixture	Thailand	1x1L	? 18.80	\$2.50
Chabaa 100 percent pomegranate & grape juice sugar-free	Thailand	1x1L	? 22.50	\$3.00
Chabaa 100 percent red grape juice sugar-free	Thailand	1x1L	? 20.80	\$2.77
Chabaa 100 percent vegetable with mixed fruit juice sugar-free	Thailand	1x1L	? 20.80	\$2.77
Chabaa 100 percent carrot with mixed fruit juice	Thailand	1x1L	? 20.80	\$2.77
Chabaa 100 percent tomato juice sugar-free	Thailand	1x1L	? 20.80	\$2.77
Lambda guava juice drink	Spain	1x1L	? 49.80	\$6.64
Lambda mango juice drink	Spain	1x1L	? 49.80	\$6.64
Lambda peach juice drink	Spain	1x1L	? 49.80	\$6.64
Lambda pera-pina juice drink	Spain	1x1L	? 49.80	\$6.64
Lambda grapefruit juice drink	Spain	1x1L	? 49.80	\$6.64
Lambda guaraba	Spain	1x250ml	? 17.80	\$2.37
Lambda mango	Spain	1x250ml	? 17.80	\$2.37
Lambda pera-pina	Spain	1x250ml	? 17.80	\$2.37
Lambda grapefruit	Spain	1x250ml	? 17.80	\$2.37
Rabenhorst cherry	Germany	1x750ml	? 75.00	\$10.00
Rabenhorst blueberry	Germany	1x750ml	? 99.80	\$13.31
Ocean' Spray	U.S.	1x1.89L	? 45.00	\$6.00
Treetop 100 percent Apple juice (no sugar added)	U.S.	1x946ml	? 28.80	\$3.84
Snapple mix juice drink (grape+corn+lemon)	U.S.	1x473ml	? 14.50	\$1.93
V8 100 percent vegetable mix	U.S.	1x340ml	? 8.50	\$1.13
V8 100 percent vegetable mix	U.S.	1x163ml	? 5.00	\$0.67
Del Monte cranberry Jelly fruit drink	U.S.	1x946ml	? 42.80	\$5.71
Welch 100percent grape juice w/vitamin C	U.S.	1x710ml	? 36.00	\$4.80

(Source: ATO Guangzhou's retail visits December 2007) * Exch. rate: 1US\$ = 7.5 RMB (?)

Table 2: Fruit and vegetable juice tariffs

Fruit juices (including grape must) and vegetable juices, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter

Tariff Item		Article Description		
20.09	HS code	Fruit juices and vegetable juices,	M.F.N. (%)	Gen. (%)
		Orange juice		
	2009.1100	Frozen	7.5	90
	2009.1200	Not frozen, of a Brix value not exceeding 20	30	90
	2009.1900	Other	30	90
		Grapefruit juice		
	2009.2100	Of a Brix value not exceeding 20	15	90
	2009.2900	Other	15	90
		Juice of any other single citrus fruit		
		Of a Brix value not exceeding 20		
	2009.3110	Lemon juice	18	90
	2009.3190	Other	18	90
		Other		
	2009.3910	Lemon juice	18	90
		Other	18	90
		Pineapple juice		
	2009.4100	Of a Brix value not exceeding 20	10	90
	2009.4900	Other	10	90
		Tomato juice		
	2009.5000	Tomato juice	30	80
		Grape juice (including grape must)		
	2009.6100	Of a Brix value not exceeding 30	20	90
	2009.6900	Other	20	90
		Apple juice		
	2009.7100	Of a Brix value not exceeding 20	20	90
	2009.7900	Other	20	90
		Juice of any other single fruit or vegetable:		
		Fruit juice		
	2009.8011	Coconut juice	10	90
	2009.8012	Mango juice	20	90
	2009.8013	Passion-fruit juice	20	90
	2009.8014	Guava juice	20	90
	2009.8019	Other	20	90
	2009.8020	Vegetable juice	20	80
		Mixtures of juices		
	2009.9010	Of fruit juices	20	90
	2009.9090	Other	20	80

(Source: Import and Export Tariff of the People's Republic of China, Version 2007)

Table 3: Formula to determine import tax on U.S. juices

Take Mixture of juices as an example, total import tax rate for juices factor in an import customs duty (ICD) rate, and value-added tax (VAT) rate:	
1. Import customs duty (ICD) rate	20%
2. Value-Added tax VAT rate	17%

Rather than being the simple sum of these percentages, however, the total import tax is calculated using a compound formula. Using mixture of juices for an example, the compound rate is calculated as the following table shows.

As a result, we can calculate that the total import tax on mixtures of juices is 40.4 percent.

Total import tax rate	=	ICD (0.20)	+	VAT rate (0.17)	+	(ICD (0.20) X VAT rate (0.17))	
		1 – CTR (0.00)					

To simplify,

Total import tax rate	=	0.37	+	0.034	=	0.404	=	0.404	=	40.4%
		1				1				

(Source: 2007 Customs Import and Export Tariff of the People's Republic of China)

**Table 4: Top 10 exporters of frozen orange juice to China market
(HS code 200911)**

						Percent Share		Percent Change
Rank	Country	2005	2006	2007	2005	2006	2007	- 07/06 -
0	--World--	57.9815	81.04696	117.7504	100	100	100	45.29
1	Brazil	47.12395	55.17633	78.41815	81.27	68.08	66.6	42.12
2	Israel	7.619457	22.05339	30.86226	13.14	27.21	26.21	39.94
3	Netherlands	2.506972	2.757788	3.447284	4.32	3.4	2.93	25
4	Italy	0.462924	0.525084	2.350877	0.8	0.65	2	347.71
5	United States	0.215796	0.013534	1.343924	0.37	0.02	1.14	9829.98
6	Greece	0	0.020156	0.615615	0	0.03	0.52	2954.25
7	Spain	0	0	0.313418	0	0	0.27	0
8	Singapore	0	0	0.26271	0	0	0.22	0
9	Hong Kong	0.026289	0.03002	0.064395	0.05	0.04	0.06	114.51
10	Taiwan	0	0.100052	0.018393	0	0.12	0.02	-81.62

(Source: China Customs 2007)

**Table 5: Off-trade sales of fruit/vegetable juice by subsector: volume
(Million liters, CY 2001-2006)**

	2001	2002	2003	2004	2005	2006
- 100 percent juice	378.7	426.6	484.9	561.0	621.5	695.8
- Nectars (25-99 percent juice)	528.9	613.3	712.6	841.8	979.5	1,114.0
- Juice drinks (up to 24 percent juice)	937.1	1,231.1	1,673.5	2,308.6	2,881.5	3,486.5
Fruit/Vegetable juice	1,844.7	2,272.0	2,870.9	3,711.3	4,482.5	5,296.3

(Source: Euromonitor 2007)

Table 6: Chinese fruit & vegetable juices brands available at Shenzhen Ole store

Store Name/ Location	Brand name	Type of Juice	Country of Origin	Package	Retail Price (RMB)	Retail Price (US\$)
Shenzhen Ole, Mix-city	Bosun	Mulberry juice	China	1x946ml	? 22.80	\$3.04
	Bosun	Mulberry drink	China	1x260ml	? 5.80	\$0.77
	Kang Shifu Xian Zhi Meiri C	Orange drink	China	1x500ml	? 2.90	\$0.39
	Minute Maid	Orange drink	China	1x450ml	? 2.90	\$0.39
	Mr. Juicy	Mandarin lemon juice drink	China	1x480ml	? 3.00	\$0.40
	Mr. Juicy	Sugarcane juice	China	1x480ml	? 3.00	\$0.40
	Nongfu Guoyuan	100% Tomato juice mixed with orange and apple	China	1x380ml	? 10.80	\$1.44
	Ole fresh squeeze juice	Pear	China	1x250ml	? 12.80	\$1.71
	Pokka	Orange drink	China	1x240ml	? 3.90	\$0.52
	Qoo	Orange drink	China	1x450ml	? 3.00	\$0.40
	SPSE (xiapushaier)	Sea-buckthorn juice	China	1x500ml	? 4.50	\$0.60

(Source: ATO Guangzhou's visit to Ole, data from purchase receipt, Feb 2008)

* Exchange rate: 1US\$ = 7.5 RMB (?)

Table 7: Imported fruit & vegetable juices brands available at Shenzhen Ole store

Store Name/ Location	Brand name	Type of Juice	Country of Origin	Package	Retail Price (RMB)	Retail Price (US\$)	
Shenzhen Ole, Mix-City	Berri	Creations grape juice	Australia	1x1.5L	? 46.00	\$6.13	
	Golden Circle	Prune juice	Australia	1x1L	? 42.00	\$5.60	
	Harvey Fresh	42 percent pineapple 27percent Apple, 27 percent Orange	Australia	1x1L	? 22.00	\$2.93	
	Mountain Maid	Premium apple & berry juice	Australia	1x375ml	? 19.80	\$2.64	
	Original Juice Co.	Apple juice	Australia	1x1L	? 27.80	\$3.71	
	Pureharvest	Organic apple juice	Australia	1x1L	? 39.90	\$5.32	
	Pfanner	Orange juice	Austria	1x1L	? 27.80	\$3.71	
	Pfanner	Multi-fruit juice	Austria	1x2000ml	? 37.00	\$4.93	
	Pfanner	Grape juice	Austria	1x330ml	? 10.00	\$1.33	
	Rabenhurst	Carrot juice	German	1x125ml	? 11.00	\$1.47	
	Rabenhurst	Cherry juice	German	1x125ml	? 13.80	\$1.84	
	Rabenhurst	Prune juice	German	1x125ml	? 11.50	\$1.53	
	SchneeKoppe Vital	Cabbage juice	German	1x330ml	? 18.00	\$2.40	
	Qoo	Orange drink	Japan	1x300ml	? 15.80	\$2.11	
	Haitai	Cocopalms Muscat	Korea	1x238ml	? 5.80	\$0.77	
	Lotte	Guava juice	Korea	1x180ml	? 5.80	\$0.77	
	Lotte	Lemon juice	Korea	1x240ml	? 4.90	\$0.65	
	Kern's Nectar	Strawberry juice	Mexico	1x340ml	? 13.50	\$1.80	
	Kern's Nectar	Pear juice	Mexico	1x340ml	? 13.50	\$1.80	
	Pureharvest	Premium Orange juice	New Zealand	1x1L	? 48.00	\$6.40	
	Philippine	Guava juice	Philippine	1x250ml	? 4.90	\$0.65	
	Juver	Grape juice	Spain	1x200ml	? 4.20	\$0.56	
	Juver	50 percent Pineapple and 50 percent Apple juice	Spain	1x1L	? 28.00	\$3.73	
	Lambda	Guava juice or Fruit Mixture	Spain	1x250ml	? 17.80	\$2.37	
	Chabaa	Pomelo juice	Thailand	1x1L	? 22.00	\$2.93	
	Malee	Carrot with mixed fruit juice	Thailand	1x1L	? 18.80	\$2.51	
	AGV	Honey tomato drink	Taiwan	1x580ml	? 12.80	\$1.71	
	Agv products co.	Proanthocyanidin grape seeds	Taiwan	1x590ml	? 10.80	\$1.44	
	Green Power	Peach juice	Taiwan	1x490ml	? 5.80	\$0.77	
	Green Power	Grape juice	Taiwan	1x480ml	? 5.80	\$0.77	
		Martinelli's Gold Medal	Apple-Grape juice	U.S.	1x296ml	? 14.50	\$1.93
		Realime	Lime juice	U.S.	1x73ml	? 26.50	\$3.53
	Realemon	Lemon juice	U.S.	1x236ml	? 8.80	\$1.17	

(Source: ATO Guangzhou's visit to Ole, data from purchase receipt, Feb 2008)

*Exchange rate: 1US\$ = 7.5 RMB (?)

Table 8: Chinese brands available at *Jusco (Guangzhou)* store

Store name/Location	Brand name	Flavor	Origin	Package	Retail Price(RMB)	Retail Price (US\$)
Jusco, Teem He plaza, Guangzhou	Dole	100 percent Orange juice	China	1x1L	? 10.80	\$1.44
	Dole	100 percent Apple juice	China	1x1L	? 10.80	\$1.44
	Dole	100 percent Tomato juice	China	1x1L	? 10.80	\$1.44
	Dole	100 percent Grapefruit juice	China	1x1L	? 18.50	\$2.47
	Huiyuan	100 percent Apple juice	China	1x1L	? 12.80	\$1.71
	Huiyuan	100 percent Orange juice	China	1x1L	? 13.80	\$1.84
	Huiyuan	100 percent Strawberry juice	China	1x1L	? 8.20	\$1.09
	Huiyuan	100 percent Grape juice	China	1x1L	? 12.80	\$1.71
	Kirin	100 percent Orange juice	China	1x2L	? 32.80	\$4.37
	Uni-president	Grape drink	China	1x250ml	? 1.50	\$0.20
	Uni-president	Peach drink	China	1x250ml	? 1.50	\$0.20
	Mr. Juicy	Mango mixed	China	1x250ml	? 3.90	\$0.52
	Mr. Juicy	Orange drink	China	1x250ml	? 3.90	\$0.52
	Mr. Juicy	Apple mixed	China	1x250ml	? 3.90	\$0.52
	Kagome	100 percent Carrot mixed juice	China	1x240ml	? 3.90	\$0.52
	Kagome	100 percent Mango mixed juice	China	1x450ml	? 3.00	\$0.40
	Kagome	100 percent Vegetable mixed juice	China	1x500ml	? 4.50	\$0.60

(Source: ATO Guangzhou's visit to Ole, data from purchase receipt, Feb 2008)

*Exchange rate: 1US\$ = 7.5 RMB (?)

Table 9: Imported brands available at *Corners' Deli (Guangzhou)* store

Store name & Location	Brand name	Type of Juice	Country of Origin	Package	Retail Price (RMB)	Retail Price (US\$)
Corner's Deli, Guangzhou, Teem He	Santal	Cherry drink	Italy	1x250ml	? 13.80	\$1.84
	Santal	100 percent orange juice	Italy	1x1L	? 29.50	\$3.93
	Vital	Nectar with 30 percent raspberry, 20 percent Apple plus pulp	Portugal	1x330ml	? 12.00	\$1.60
	Vital	Nectar with 20% mango, 5 percent cherry and acerola	Portugal	1x330ml	? 12.00	\$1.60
	Vital	Nectar with 23percent orange, 14 percent carrot plus mango with pulp	Portugal	1x330ml	? 12.00	\$1.60
	Compal	100 percent orange juice	Portugal	1x1L	? 26.80	\$3.57
	Compal	100percent apple juice	Portugal	1x1L	? 26.80	\$3.57
	Compal	100 percent pine apple juice	Portugal	1x1L	? 26.80	\$3.57
	Compal	Nectar Guava juice	Portugal	1x1L	? 26.80	\$3.57
	Rose's lime juice	Lime juice	Australia	1x750ml	? 42.00	\$5.60
	Tropicana-Kirin	Fruits blent juice	Japan	1x280ml	? 15.00	\$2.00
	Tropicana-Kirin	100 percent orange juice	Japan	1x280ml	? 15.00	\$2.00
	Tropicana-Kirin	100 percent apple juice	Japan	1x280ml	? 15.00	\$2.00
	Nagono	Vegetable mixture	Japan	1x470ml	? 18.00	\$2.40
	Dydo	Mixture nectar	Japan	1x300ml	? 21.80	\$2.91
	Haitai	Crushed apple	Korea	1x238ml	? 6.00	\$0.80
	Lotte	Grape & coconut	Korea	1x238ml	? 4.80	\$0.64
	Lotte	Guava juice	Korea	1x180ml	? 4.80	\$0.64
	Nikka	Mango nectar	Philippine	1x1L	? 19.50	\$2.60
	Kagome	100 percent Tomato juice	Taiwan	1x190ml	? 6.00	\$0.80
Rauch Bravo	Mixture nectar	Austria	1x250ml	? 10.40	\$1.39	
Rauch Bravo	Strawberry	Austria	1x250ml	? 13.20	\$1.76	
Rauch Bravo	Orange	Austria	1x250ml	? 11.30	\$1.51	
Rauch Bravo	Peach	Austria	1x250ml	? 11.30	\$1.51	

(Source: ATO Guangzhou's visit to Ole, data from purchase receipt, Feb 2008)

*Exchange rate: 1US\$ = 7.5 RMB (?)