



the best of fruit

ANNUAL REPORT 2018



Our Vision

We are the leading European fruit beverage company, creating sustainable company and category value with strong and unique brands.

We inspire consumers and customers with the best of fruit for all relevant needs and occasions.

Our highly motivated, performance-oriented organization is characterized by a dynamic entrepreneurial culture.

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Market lead

in Europe extended

Eckes-Granini generated important impulses for the entire category in the fruit beverage market once again in 2018 – with a number of new, highly appealing product concepts that cater ideally for consumers' needs and enabled the company to attract new target groups for its brands.

The past business year posed a number of major challenges for the Eckes-Granini Group. The burden of high external costs was coupled with substantial integration measures and investments.

We faced this challenging business climate with strong commitment and resolve, and pursued the goals set forth in our Agenda 2020 with great vigour. And we continued to develop our Group and our brands in keeping with the lifestyles, nutritional habits and needs of our

customers. This enabled Eckes-Granini to extend its lead in the European fruit beverage market and to raise its market share to a new record level compared to other brand producers in terms of both volume and value. This success is attributable above all to the employees in our national subsidiaries and to our strategic brands.



The growth achieved in 2018 brought total Group turnover close to the one billion euro mark at EUR 985 million. That mark would have been surpassed for the first time during the past business year if we hadn't ended our sales partnership with innocent in the Nordic countries in early 2018.

The strategic development of the fruit beverage category was given massive support once again in the form of substantial investments in brand advertising, new technologies and plant systems. That is evidenced by prize-winning crossover campaigns, such as that for *granini Selection*, and successful B2B concepts for customer-oriented product presentation, including the one implemented in Sweden, for example, as well as the ambitious but complex project devoted to the expansion and reconstruction of the Danish production plant in Rynkeby. Thanks to the aggressive investment policy we have pursued in recent years, we now have production capacities that have no equal in terms of quality, product

safety and efficiency within the industry throughout the entire Group.

The digital transformation is progressing at full speed in the food and beverage industry as well. We have been omnipresent in all relevant channels for many years. We also plan to make our in-house processes digitally fit for the future, and are relying on the newest agile methods and modern concepts to achieve that goal. We are assessing the possibilities offered by digital technologies and processes with the support of our interdepartmental "Digital Edge Team", and adapting them appropriately for the Group – from the supply chain to communication with consumers.





We are also pursuing the goals set within the framework of our Sustainability Programme with great commitment and focused resolve. We have already moved a number of initiatives ahead and implemented them consistently. These include the successful certification of all our production plants in accordance with the demanding Eco Management and Audit Scheme (EMAS) as well as regular improvements achieved on the supplier side – as evidenced by the results of regularly scheduled audits by the independent EcoVadis Institute.

We can also report successes in the key areas of packaging, nutritional profiles, working conditions in the countries of origin and climate neutrality issues on which we in the Eckes-Granini Group are working intently and in continuous dialogue with relevant stakeholders. One example is the use of plastic. In the case of the new, transparent bottle for *hohes C BIO*, 50 % of the PET used in production comes from recycled plastic and 15 %

from renewable raw materials. Another example is sugar reduction, an area in which we are making very good progress, thanks not least of all to our new product lines, such as *Die leichte Limo* and *Joker Le Pur Jus* with added coconut water. We came very close to meeting our goal of reducing the amount of added sugar in our beverages by 10 % in accordance with our Agenda 2020 during the past business year.

By signing the “Sustainable Juice Covenant”, we accept the obligation to raise the relative percentage of sustainable juices and smoothies in our portfolio continuously over the next twelve years. The ambitious goal we are now pursuing along with other international beverage producers and suppliers is to reach 100 % by the year 2030. And as a partner to the Zentrum für Nachhaltige Unternehmensführung (Centre for Sustainable Corporate Management, ZNU) we are working hard to achieve CO₂ neutrality at our plants.



From left to right: Ulrich Bunk, Sidney Coffeng,
Thomas Hinderer, Emmanuel Manichon,
Dr Kay Fischer, José Martí Cos

In addition to our environmental and economic policy cornerstones, Eckes-Granini is also concerned with the social aspects of sustainability. Our international lighthouse project is the “Team Rynkeby” charity cycling initiative, which has been dedicated for years to providing support for children with cancer – with increasing success, as reflected in both the number of participating teams and the volume of donations collected. “Team Rynkeby – hohes C” will participate as the first German team in the history of the project in 2019. In this way, the Eckes-Granini Group supports the progressive international expansion of an initiative that was originally launched by employees of the Danish Rynkeby Foods A/S company, which is part of our Group since 2016.

This annual report is intended to provide an overview of the past business year – including our successes, our challenges, our projects and the things that drive us ahead and make us strong. The layout we have chosen

for the pages between chapters is meant as a visual representation of this transparency.

Our gratitude and recognition are due above all to the highly motivated employees of the Eckes-Granini Group, all of whom contributed to the success of our organization as a whole with commitment, competence and determination again in 2018.

*Executive Board of Eckes AG and
the Eckes-Granini Group*



Business Year 2018

Market lead extended through successful innovations, excellent customer development and strategic investments in brands and technology.

General market trend: revenue growth and declining volume sales

Per capita consumption and thus volume sales of fruit beverages declined slightly in many European countries again in 2018 (data from 12 core countries, retail food trade*). Increased consumption volumes were reported only in Sweden, Lithuania, Denmark and – once again – in Romania and Hungary.

Sales of fresh chilled juices and smoothies remained constant at the previous year's level, while volumes sales of ambient fruit beverages, including fruit juices, in particular,

declined. Once again, private label brands suffered greater revenue and volume losses than the market as a whole.

The relative shares of different packaging formats shifted in favour of PET bottles again in 2018, due in part to the fact that they are by far the most frequently sold packaging in the chilled segment. Glass bottles posted revenue gains and benefited from the trend in favour of premium juices. In contrast, sales of fruit beverages in cartons – and especially the family-sized containers (1.5 litres and above) typical of private label brands – were down slightly once again. This loss was not offset by the growth in sales of small packaging units.

!* Austria, Belgium, Denmark, Finland, France, Germany, Hungary, Lithuania, Romania, Spain, Sweden and Switzerland;
market figures for Finland are estimates



Key figures	2014	2015	2016	2017	2018	Diff. 2017/2018
Eckes-Granini brands volume in million litres*	886	822	840	858	908	+5.8 %
Net turnover in million EUR*	876	842	893	974	985	+1.1 %
Earnings before Interest and Taxes (EBIT) in million EUR	76.2	88.7	86.1	87.0	72.0	-17.2 %
Employees (full-time equivalent)	1,640	1,491	1,684	1,747	1,725	

!* including licensed business

Eckes-Granini Group: volume and turnover growth bring market-share gains

The Eckes-Granini Group recorded excellent gains in an extremely challenging and demanding market environment once again in 2018. The Group extended its existing lead over other brand producers with a volume-based market share of 11.2 % (2017: 10.3 %) and a corresponding revenue-based share of 11.9 % (2017: 11.3 %).

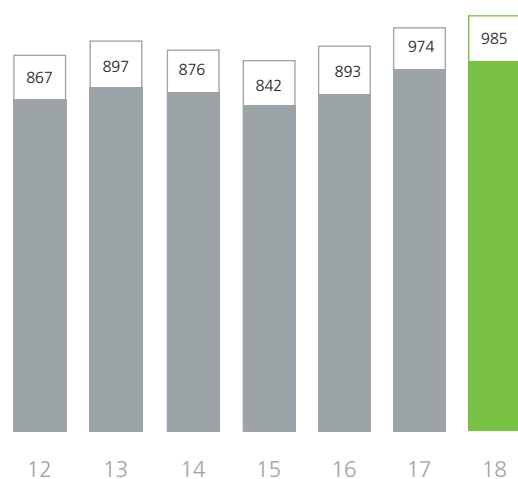
In defiance of the general market trend, the Group recorded a substantial 6 % increase in volume sales of fruit beverages to 908 million litres (2017: 858 million litres). Volume gains were achieved by all eleven strategic brands – from *Brämhults* to *YO* syrup.

Following a striking growth spurt in 2017, turnover rose once again by 4.9 % to EUR 985 million in 2018. Turnover in 2017 amounted to EUR 938 million, adjusted by EUR 35 million in sales revenue from the sales partnership between the Danish subsidiary Rynkeby and the British smoothie producer innocent. Eckes-Granini ended this cooperative arrangement in 2018. Positive growth was driven above all by successful product innovations in the core business segment and the development of new customer relationships in the retail food trade and the out-of-home channel.

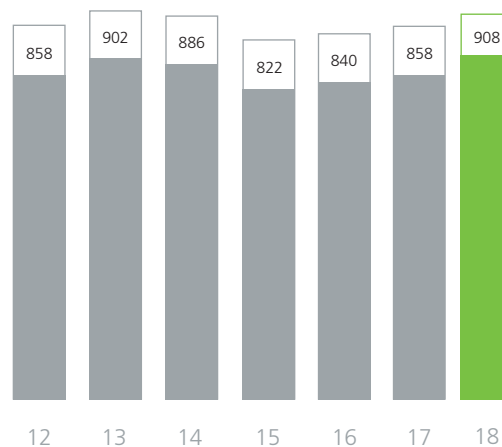
As in 2017, the past business year was marked by the negative impact of higher raw material prices. Due to the weak harvests of 2017, prices for apple juice concentrate were nearly 50 % higher than those of the preceding year. In addition, expenditures for energy and logistics rose as well. Crude oil prices have been increasing steadily for years and the costs of electricity have risen as well since 2016. Higher logistics costs were attributable above all to the imposition of tolls on lorries travelling on national roads, rising prices for diesel fuel and substantial wage increases in the transport sector on the basis of collective bargaining agreements.

Under the influence of these substantial external cost effects and further investments in ambitious and complex improvements in the supply chain, the Eckes-Granini Group reported earnings before interest and taxes (EBIT) of EUR 72 million, and thus results were below the excellent results of the previous years.

Turnover 2012–2018 in million EUR*

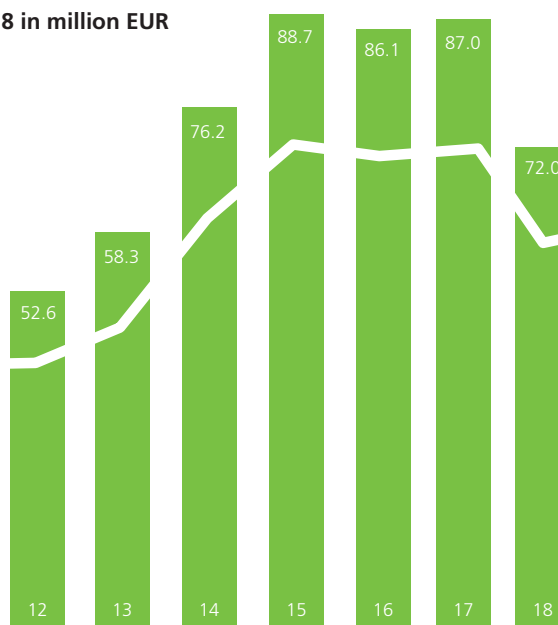


Volume sales 2012–2018 in million litres*

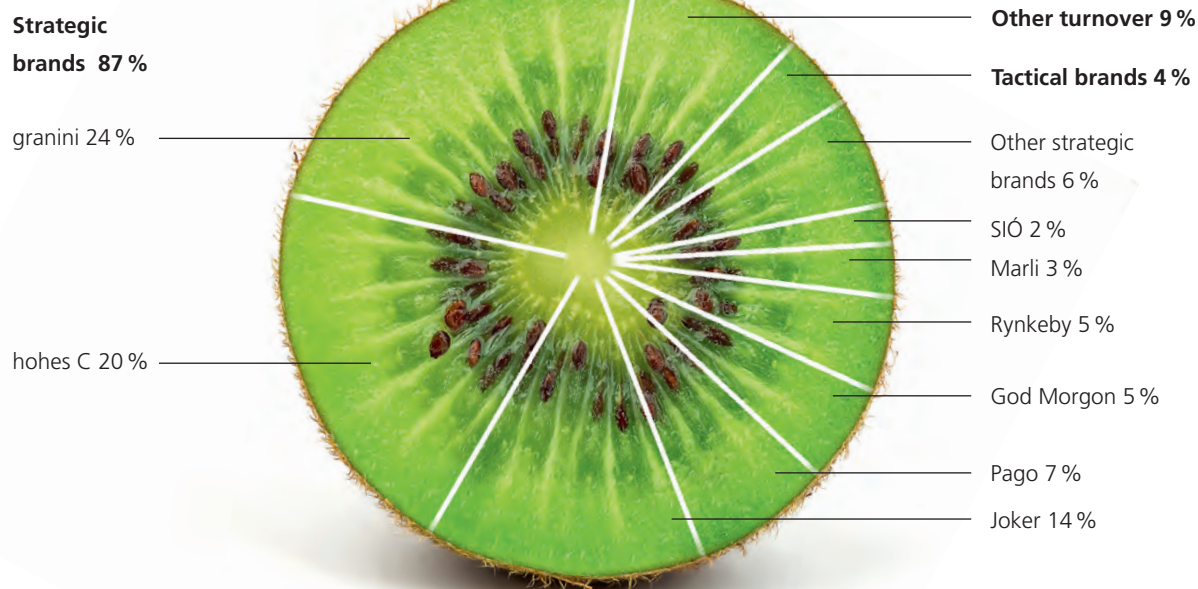


* Including licensed business; new accounting directive: reporting of turnover excluding excise tax

Earnings before Interest and Taxes (EBIT) 2012–2018 in million EUR



Net sales shares by brand in 2018 (figures rounded)*



| * Basis: core business fruit beverages

Growing progressively with innovative concepts and products

As the market leader and a pioneer in the fruit juice category, Eckes-Granini aims to drive further growth, not only of its own business but that of the entire industry as well – and thus to build the value of the fruit beverage category.

Key drivers of business success are sustainable innovations focused on growth – initiatives, concepts and products that generate new impulses for consumption and attract new consumers to our brands and categories. Six “Category Growth Drivers” define the strategic approach we pursue with our innovations: “Fuel the Day”, “Specific Health Needs”, “Excite my Senses”, “Closer to Nature”, “Entertain me” and “Up & Running”.

The Group demonstrated its innovative power in impressive fashion once again during Business Year 2018. Examples included the *granini Selection* and *granini Selección* premium ranges (in Germany and Spain, respectively) featuring a range of intensely fruity nectars. While the exotic Passion Fruit, Mango and Cranberry varieties grace the shelves of stores in Germany, consumers

in Spain can select from amongst five different flavours: Pear, Banana, Pink Grapefruit, Apricot and Mango.

Thanks to optimum fruit quality, they offer extraordinary, superior-quality enjoyment in everyday situations – in the true spirit of “Excite my Senses”.

Another newly developed product range, *Die leichte Limo* (Limo Light), responds to the megatrend in favour of lower sugar content, which is reflected in the growth achieved in the reduced-sugar fruit soft-drink segment. With 50 % less sugar and no added sweeteners, the low-sugar version of *Die Limo* impresses consumers with the Dark Berries-Lemon and Lemon-Mint flavour varieties. “Fuel the Day” was the inspiration for a full-flavour experience and sparkling refreshment in this case. An impressive success story: just eight months after its introduction to the German market, one out of every five *granini*



fruit-based soft drinks sold was a reduced-sugar product. Eckes-Granini France also introduced a new line of low-sugar juices to the *Joker* range – with impressive success. Thanks to the use of coconut water, *Joker Le Pur Jus* has 30 % fewer calories than traditional fruit juice.

The *hohes C PLUS* range responds to the trend in favour of a balanced diet. Adapted to meet a number of different needs, these fruit blends are a source of additional nutrients and dietary fibre and thus contribute significantly to a healthy and balanced lifestyle. With the addition of three newcomers – *hohes C PLUS Calcium & Vitamin D*, *hohes C PLUS Zink* and *hohes C PLUS ProVitamin A* – the range was expanded from four to seven varieties and welcomed heartily in the market. The appearance of these new products on store shelves is highlighted by attractive, colourful full-sleeve labels that emphasize their added value for consumers and the retail trade.

Strong impulses were also provided by new packaging concepts, such as small packaging units introduced in the on-the-go segment. *Brämhults*, on the other hand, opted to “go big”, and launched a range of smoothies in 0.85-litre bottles, which was welcomed with enthusiasm by consumers.

The Group has also continued to expand its portfolio in the out-of-home market – with the new *granini* range of premixed cocktails introduced in 2018, for example. These products enable professional bartenders to produce a perfect Moscow Mule, Piña Colada, Mai Tai, Sex on the Beach or Mojito even during rush phases. All they need to do is add the appropriate spirits.

Creative advertising for strong brands

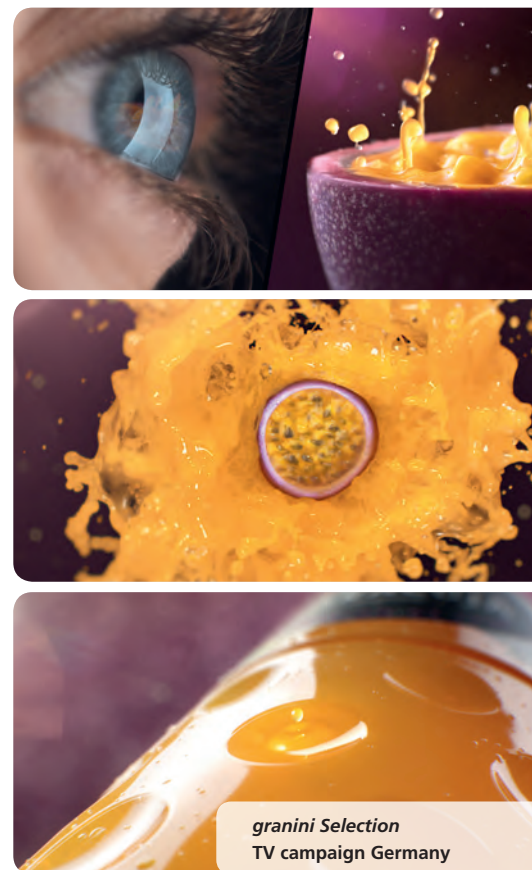
The Group invested heavily in staging and presentation of its brands and the positive images of juices, nectars, smoothies and fruit-based soft drinks once again in 2018 – and that in all relevant channels.

As in the “made for enjoyment” cross-media campaign on behalf of *granini Selection* in Germany, for instance,

with which Eckes-Granini demonstrated its innovative drive in advertising as well. Brilliant colours, numerous close-ups and eye-catching stylistic features highlighted the exotic qualities of the Cranberry, Mango and Passion Fruit varieties in the Internet and on TV, and appealed to the important younger target group in the process. The amusing “licuadora” (Spanish: mixer) moving-image campaign in Spain, which emphasized the fresh and juicy taste of *granini Selección*, attracted strong attention in TV and digital media. The resulting resounding and sustained success in sales of the subrange culminated in a record market share. Furthermore, the *Selección* campaign generated significant positive spill-over effects for the *granini* brand.

Effective point of sale activities – both online and offline

Integral components of the marketing mix are eye-catching measures at the point of sale (POS) aimed not only at making our products more visible, but also at placing them in a more appealing setting and making them easily accessible wherever consumers are looking for fruit beverages. A typical example was the innovative and highly successful concept for a demand-based, consumer-oriented presentation of goods in juice sections in Sweden developed by Eckes-Granini in cooperation with the ICA supermarket chain, the largest retail partner in the country, in 2018. The objective was to sort the products on the basis of consumer needs as opposed to the traditional way by flavour or brand.



However, the point of sale is not limited solely to the stationary retail trade or the out-of-home market, as the relevance of the virtual world increases by leaps and bounds year after year. Consequently, the Eckes-Granini Group stepped up its investments in the online presentation of its brands with numerous activities in the field of e-commerce during the past business year – and with measurable success. The Group's B2C advertising investments, known as its share of voice, rose once again from 17 % to 20 %.

Sustainable investments in production and technology

Within the framework of its Agenda 2020, the Eckes-Granini Group has invested sustainably in its European facilities over the past three business years. Roughly EUR 80 million have been expended for new technologies, filling systems and packaging lines. Today, Group production plants represent state-of-the-art technical standards in terms of quality, modernity and efficiency – an important prerequisite for future growth.

The most recent showcase project was the expansion of the production plant in Ringe (Denmark), one of the most modern facilities of its kind. A citrus press, a belt press, a new juice preparation unit and two filling units for PET bottles were installed on the production line for freshly pressed *Bråmhults* fruit and vegetable juices.

Following the completion of what is now the third filling line at the plant in Mâcon (France), Eckes-Granini France is now placing greater emphasis on PET. Whereas the direct juices from *Joker* have traditionally been presented in the typical Ovaline cartons, they will be marketed in a newly designed PET bottle in future.

Leadership culture at Eckes-Granini:

a shared approach across all national boundaries

The success of an organization and the level of satisfaction of its employees depend above all on its corporate and leadership culture. Accordingly, the Group-wide dialogue on the Eckes-Granini Leadership Culture initiated in 2017, was promoted in all national organizations in 2018. To an increasing extent, dialogue devoted to establishing a shared concept of leadership and emphasizing its importance for business success is now being pursued at various different corporate levels. Moreover, the leadership culture is being embedded progressively in existing processes. Among other things, it plays an important role in the recruitment of employees and management personnel, and now has a firmly established place in annual performance evaluations and goal agreements.



Juice preparation, Ringe (Denmark)



Filling line plant, Mâcon (France)

The aspect of feedback as a dimension of leadership culture was identified as a particularly important focal point for the coming business years. Thus beginning with the Group's general managers, the 360° feedback process introduced in 2018 will be extended to the next level of the management hierarchy in 2019. In addition, our employees will be supported by national and international training programmes designed to improve feedback competence during the year to come.



... Breakfast of Champions!

This shared approach supports the Group as it progresses towards the goal of becoming a high-performance organization. In this way, the clearly defined dimensions of leadership culture are embedded in everyday life and work at Eckes-Granini.

Eckes-Granini honoured as a Top Employer

As a sustainable and socially responsible business enterprise, Eckes-Granini quite naturally invests in its employees and the development of the organization. The Group's massive commitment on behalf of its employees is also recognized and honoured outside of the organization. Eckes-Granini Germany was cited as one of Germany's top employers and one of the four employers in the FMCG (Fast Moving Consumer Goods) industry by the news magazine FOCUS in cooperation with the kununu employer evaluation platform. The German national organization impressed the jurors above all with the introduction of modern working methods, such as coopera-

tion within cross-functional teams and other measures in the areas of health management and social engagement. Eckes-Granini France proudly accepted an Employee Engagement Award conferred by a prominent personnel consulting firm in recognition of outstanding achievements in the field of leadership culture and employee management.

Digital transformation: the "Digital Edge Team"

Digital competencies employed, for example, in support of supply chain optimization, digital workstation creation and new marketing concept development will play a key role in shaping the future of the Eckes-Granini Group. And employees trained in digital skills may well give the organization a crucial competitive edge. The mission of the interdepartmental "Digital Edge Team" established in 2018 is to promote sustained progress in digital transformation within the Group. The team reviews and analyses promising approaches and bundles them in projects that are then carried out by the various national organizations. Eckes-Granini's IT structures, which are constantly modernized and expanded (with an eye for scalable deployment within the Group), provide for a solid foundation in this context.

The team works in keeping with the most current agile methods and modern concepts in order to derive the greatest possible benefit from digital technologies and processes. Three focal points have been assigned the highest priority: digital communication with consumers, a better exchange of data with new and existing customers and improvements along the entire value chain.

The "Digital Edge Team" also plays a leading role in the area of digital culture. New digital work processes and agile methods are tested initially and then established in cooperation with Group subsidiaries in a second step.





Sustainability: responsibility for people, products and the value chain

As a family-owned enterprise, Eckes-Granini has always emphasized the importance of sustainable business activity. In recognition of its equal responsibility for people, products and the value chain, the Group has been supporting and promoting various initiatives for decades and pursued this sustainability strategy consistently during the past business years. As a member of the Zentrum für Nachhaltige Unternehmensführung (Centre for Sustainable Corporate Management, ZNU), Eckes-Granini Deutschland is a participant in the "ZNU goes Zero" initiative, which is dedicated to the goal of achieving carbon neutrality in business enterprises by the year 2022. The Group's German locations are already working hard to realise this ambitious goal, and are currently developing concrete projects devoted to offsetting CO₂ emissions. The Group's French subsidiary has also focused attention on climate protection by supporting reforestation projects launched by "PUR Projet", a non-governmental organization (NGO).

Products:

The goal of reducing sugar content by 10 %

The Eckes-Granini Group continued to work toward its goal of reducing the quantity of sugar added to fruit beverages, including nectars, syrups and fruit-based soft drinks, by 10 % by 2020 – an 8 % reduction was already achieved by 2018. Efforts in support of sugar reduction relate to the development of new products as well the modification of existing formulas on the basis of reassessments of potential solutions for sugar reduction. Nearly 200 projects have been realised in almost all national subsidiaries over the past three years. Successes include the launch of *Die leichte Limo* (Limo light) with 50 % less sugar in Germany and the introduction of *Joker Le Pur Jus* as the first direct juice containing 30 % less sugar (thanks to the use of coconut water) in France.

Packaging:

Less weight, more recyclable material

The Eckes-Granini Group regularly underscores its role as

an industry pioneer with high-quality packaging technologies. Investments and improvements are driven above all by the demand for environmentally friendly

and resource-conserving processes along the entire value chain. Further reduction of the weights of PET packaging units and increased use of recycled PET (known as rPET) were high-priority objectives during the past business year. The current goal is to increase the percentage of rPET or bio-based PET in all bottles, by 25 % by 2020.

The Plasmax technology used in *hohes C* bottles plays an important role within the context of high-quality, resource-conserving packaging. These bottles combine the valuable properties of glass as an oxygen barrier and "vitamin safe" with the advantages of PET and rPET. More than 80 % of all *hohes C* bottles are products of the Plasmax process and are just as recyclable as conventional PET bottles.





Raw materials: Continuous improvements along the entire supply chain

“We bring people the best of fruit for a healthy and enjoyable life”.

This promise begins with raw materials. The selection of reliable suppliers from all over the world is the basic prerequisite for optimum product quality. The Group works with the independent EcoVadis Institute, which evaluates the environmental and social policies and practices of our suppliers on the basis of criteria of relevance to environmental protection, social responsibility, ethics and the value chain. The insights gained in the process form the basis for the initiation of further measures devoted to continuous improvement. The results of this audit play a significant role in decisions regarding the award of supplier contracts. Today, over 90 % of our suppliers participate regularly in the audit.

Exerting the greatest possible influence on the conditions under which raw materials are produced is especially important for Eckes-Granini. In support of that goal, Eckes-Granini remained active at the European level as a member of the Fruit Juice Association (AIJN) in 2018. The special task group responsible for the subject of orange cultivation in Brazil is working to improve the working conditions of small farmers, in particular, within the framework of intensive dialogue with Brazilian producers of orange juice concentrate.

Working from a different perspective, employees of Eckes-Granini also make regular visits to Brazil for the



purpose of performing critical assessments of orange plantations and fruit processing practices. Their findings flow directly into decisions regarding raw material purchases.

Production and logistics:

Success in the field of environmental protection

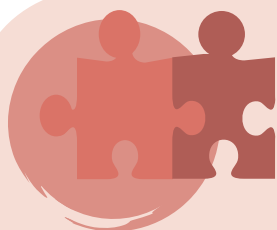
The Eckes-Granini Group also recorded a number of successes in the field of environmental protection in production and logistics. The Group is one of the few enterprises in the food industry that has been audited regularly in accordance with the Eco Management and Audit Scheme (EMAS). In 2018, the auditors credited all production plants except for the facility in Ringe with the highest level of sustainable environmental management.

Currently, more than 70 % of the electrical power consumed Group-wide comes

from renewable energy sources – and the figure rises to 100 % in Germany. Equally worthy of mention are the investments in new packaging lines that contribute to a reduction of power consumption. And thanks to driver training programmes, diesel fuel consumption by the lorries operated by the Group has been reduced by 20 % over the past five years. In recognition of that achievement, Eckes-Granini Deutschland earned the coveted award conferred by the Lean & Green Initiative in April 2018.

Equally promising future prospects are offered by the freight-space sharing project undertaken by the German national organization in cooperation with its retail partner Kaufland. In order to reduce the risk of losses associated with empty lorries and long waiting times at warehouse locations, the two companies have now agreed to share their logistics capacities, i.e. lorry loads and the shipping company – a cooperative arrangement that saves time and money while reducing the burden on the environment.





People: highly satisfied employees

Only those who feel good and enjoy their work can perform at their

very best. Because we at Eckes-Granini are firmly convinced of that, we undertake systematic measures designed to promote and support our employees. These include the creation of cross-functional teams and a tailored health-management programme, targeted efforts in support of junior staff advancement and jobs with flexible workplaces and work schedules that offer people ideal opportunities to balance work and family life.

The Group relies on regular employee surveys on various matters, including continuing education and advanced training programmes, to gain additional insights into employees' needs and wishes. On the basis of the results of the employee survey conducted in 2017, various measures – relating to such matters as advanced training and leadership – were initiated and/or implemented at all corporate locations in 2018. These included projects devoted to such matters as continuing education and leadership, for example.

Social engagement: Team Rynkeby pushes the pedals for severely ill children

The eleven cyclists from the Danish company of Rynkeby Foods A/S were counting on a number of things when they left Denmark for Paris for the first time in 2002 – but they certainly did not expect to lay the cornerstone for one of the world's biggest charity bicycle races. Sixteen years later, nearly 2,000 cyclists from Denmark, Sweden, Finland, Norway, Iceland and the Faroe Islands were welcomed enthusiastically by countless fans in the French capital after a journey of more than 1,200 kilometres. "Team Rynkeby"

has collected a total of EUR 45 million for severely ill children since 2002, including the record sum of EUR 9.4 million in 2018.

And the success story rolls on. The organizers have set their sights on new records in terms of teams, participating cyclists and total donations. "Team Rynkeby – hohes C" will take part as the first German team to participate in the event in 2019. The group will depart from Nieder-Olm on its yellow racing bikes on June 30, headed for Paris, where the riders will meet the Nordic teams six days later. This expansion of "Team Rynkeby" is a significant component of Eckes-Granini's commitment to sustainability and an initiative that is close to the hearts of everyone in the Group.

"Team Rynkeby" is a fitting representative of the Eckes-Granini tradition. After all, the Eckes Family Foundation has been supporting social and charitable institutions and projects for decades. The "International Charity Project" is an important part of this commitment. Each national subsidiary is eligible to participate in the Charity Project competition. First prize for 2018 went to the project in support of the "Oberösterreichische Kinder-Krebs-Hilfe" submitted by Eckes-Granini Austria. Second prize was awarded to the project initiated by Eckes-Granini Germany in support of the "Selbsthilfegruppe Glykogenose Deutschland e. V.". Third prize went to the "Förderverein TierGarten Oppenheim", which was nominated for consideration by headquarters.



Outlook:

healthy, sustainable growth

The Eckes-Granini Group intends to build upon its position as market leader and “category captain” in 2019, while focusing on healthy, organic growth driven by successful innovations and excellent market launches. And that against the background of a market that is still suffering from declining volume sales. The FJND (fruit juice nectar drinks) category is expected to face particularly strong challenges again this year. A rise in volume sales is not expected; redistribution within the category is more likely. The prices of raw materials and orange juice concentrate will probably remain generally high. Thus it will be all the more important to exploit gains in efficiency and productivity resulting from digitization and new production lines as fully as possible.

The progressive modernization of plants and technology will not cease in 2019, and the supply chain will remain the focus of activity in the process. Plans call for investments almost EUR 50 million, of which a substantial share will go to facilities in Germany – primarily for a new filling line for glass bottles at the Bröl plant and a highly flexible PET filling system in Bad Fallingbostel. In Finland, strong emphasis will be placed on the digitization and automation of juice preparation and filling processes in 2019.

Innovative product and packaging concepts – for on-the-go consumption, among other things – in combination with efficient cross-media advertising remain the basis for Eckes-Granini’s success. The launch of the new *hohes C BIO* range is expected to have a generally enriching impact on the organic segment. The new range unites environmental protection, sustainability and social engagement in a convincing product concept. Special attention will also be given to the adult target group, to which we plan to appeal with special flavours in a more focused and sustainable approach. The Group also plans to introduce a series of new, attractive packaging solutions that will help set Eckes-Granini’s powerful brands clearly apart from their competitors. Consistent implementation of these innovations will ensure that Eckes-Granini surpasses average overall market growth in 2019.

With respect to sustainability, the Group is dedicated to the goal of achieving carbon neutrality and continues to deal with such issues as resource conservation (through environmentally friendly packaging) and sugar reduction. “Natural quality” and “closeness to nature” will remain guiding principles in this context. Thus Eckes-Granini will continue to pursue its comprehensive strategy aimed at the future use of plastic packaging units and rPET. By signing on to the Sustainable Juice Covenant in February 2019, the Group joined other international beverage producers and suppliers in undertaking the obligation to increase the relative share of sustainable produced juices and smoothies in its product portfolio continuously, with the goal of reaching 100 % by the year 2030.

Distinctive and powerful brands, promising new products and highly motivated employees will remain both the foundation for and the guarantors of the successful growth and development of the Eckes-Granini Group.





Our brands – our heroes

The shining stars of the Eckes-Granini Group

Strong brands are like stars – they inspire us and create special moments we love to share.

They offer orientation and reliability in a constantly changing everyday environment. They are always there for us – even though we may not always take notice of them.

Millions of consumers and entire generations have grown up with the strong brands marketed by the Eckes-Granini

Group. *hohes C* has been part of everyday family life in Germany for over 60 years, to name only one example. Many parents who were treated to a lovingly poured glass of *hohes C* as children now give their own children one of our little juice packages to take along to school in order to ensure that their daily vitamin C requirement is met. Everyday practices change, but Eckes-Granini is still here for the whole family today.

Our international premium brands *granini* and *Pago* stand for superior quality and enjoyment the world over – in Germany, in Europe and beyond the boundaries of the European continent. Our “local heroes” are strong strategic brands, such as *hohes C* in Germany, Austria, Switzerland and Hungary, *Joker* in France, *SÍÓ* in Hungary, *YO* syrup in Austria and neighbouring markets, *Marli* in Finland and Estonia, *Brämhufts*, *Rynkeby* and *God Morgon* in the Nordic region and *Elmenhorster* in Lithuania. They all share



1958

1970

1980

2001

2014



Millions of consumers and entire generations have grown up with the strong brands marketed by the Eckes-Granini Group.

common values: local roots and ties, entrepreneurial responsibility and a long brand history and tradition. Common to all of these brands is their willingness to reinvent themselves again and again and to evolve in step with the changing needs and lifestyles of consumers.

As the leading supplier of fruit juices and fruit beverages in Europe, our family enterprise exports its products to over 80 countries all over the world; yet our brands have their roots in their respective countries of origin. We strive intently to preserve the unique histories and identities of each brand



marketed by the Eckes-Granini Group. Local brands are managed locally and innovations are also developed locally, in keeping with consumers' needs and wishes and with respect for local idiosyncrasies. The vitamin-enriched *Marli Vital* subrange developed for the dark winters in Finland and the new Bio range with which *Pago* is celebrating its 130th anniversary in Austria are just two of many examples that reflect our successful brand philosophy.



Inspiring consumers

New products designed to meet new needs

Like stars, brands are not merely short-lived phenomena.
Their radiance is lasting.

The same hands that traced the pattern of dimples on *granini* bottles in childhood days often reach into store shelves in joyful anticipation to try out product innovations from the brand they trust today.

The secrets of Eckes-Granini's success are closeness to consumers, interest in their lifestyles and a keen sense of their needs. Our employees in Sweden, for example, travel regularly through their whole country in "Juicefin", a 1962 Chevrolet bus converted into a mobile juice bar, and supply festival fans, among others, with vitamin-rich chilled juices from *Brämhults*, Sweden's favorite juice

brand. In personal encounters and through blogs and social media, we gain valuable insights into consumers' wishes and often use them as the basis for ideas for our next new products.

We learn from each other through our work in interdepartmental teams in each national organization. Insights gained in marketing flow directly into research and development activities devoted to creating or identifying new occasions for consumption and offering our consumers the best of fruit for every occasion. That involves more than just statistical sales analysis. We listen when our consumers share their wishes and ideas with us. And we

incorporate the results into the progressive development of our brands and products. Within the framework of the "Grow to win" agenda, our international team has identified six growth drivers on the basis of our consumers' needs:



These growth drivers inspire us in the process of developing each new product, because nutrition-conscious consumers expect more than outstanding flavour and enjoyment from fruit beverages. They want additional benefits as well. Knowing that people don't always have time to enjoy a full breakfast in the company of their loved ones, we cater for the needs of "morning minimalists" as well. A glass of juice can be a practical alternative for the many people who don't consume the recommended five portions of fruit and vegetables

every day. And consumers in search of natural, flavourful refreshment now opt more and more often for fruit juices instead of soft drinks (Fuel the Day). Some products and ranges meet their specific need for naturalness with organic quality (Closer to Nature); others offer new taste experiences that make juice consumption especially enjoyable (Excite my Senses) for people, whether alone or with friends (Entertain me). Juice can make a valuable daily contribution to good health for young and old alike in different phases of life (Specific Health Needs). And last but not least, fruit beverages can give people strength in physically and mentally demanding situations and help them cope effectively (Up & Running).

In the interest of people who prefer to consume as little sugar as possible, the Eckes-Granini Group has set itself the goal of reducing the amount of sugar added to fruit beverages, such as nectars, syrups and fruit soft drinks, by 10 % by the year 2020. That applies to the recipes for both new and existing products, for which the potential for sugar reduction is being explored. The Group is working intensively to achieve that objective, and has already launched nearly 200 initiatives in a number of countries. In France, for example, Eckes-Granini France has developed a new variety of *Joker Le Pur Jus* containing coconut water and is thus one of the first producers to offer 100 % fruit juice with reduced sugar content. In Austria, Eckes-Granini has introduced the *YO Fruchtvoll* subrange in three varieties: Apricot, Berry and Apple-Currant. These syrups, which have very high fruit content and 30 % less added sugar, contain no artificial sweeteners, colourants or preservatives, and have helped generate enthusiasm for the segment among new groups of consumers.

The secrets of Eckes-Granini's success are closeness to consumers, interest in their lifestyles and a keen sense of their needs.





More and more consumers today appreciate the diversity nature has to offer, and want to adapt their diets accordingly. The fact that the fresh, chilled juices from *Brämhults* taste different virtually every day, as dictated by variable harvesting times and seasonal fruits, represents an added benefit for many consumers. Organic products are now a growing segment in many European countries. Eckes-Granini is represented with organic products in many regional markets and has often acted as an industry pioneer in this regard. In the year 2000, *God Morgon* in Sweden was one of the very first brands to offer organic juice. Today, two out of every three organic juices that land in shopping carts in Sweden display the *God Morgon* label.

As the market leader in the fruit beverage category, we give new momentum to entire market segments. The introduction of *granini Selection*, a premium subrange in Germany, prompted a substantial rise in volume sales in the exotic beverage segment, and the *hohes C PLUS* subrange contributed to a significant gain in volume sales of juices with added health benefits.

Our product innovations offer frequent proof that we have the courage to pursue new paths. With

granini Selection, we presented a new packaging design, a new filling volume and a new label in Germany all at once. The slim 0.75-litre bottle, which earned the Red Dot Design Award, displays a black label that stands in striking contrast to the juicy fruit inside – an elegant eye-catcher on store shelves and home tables alike. Five varieties of *granini Selección* are sold in one-litre bottles in Spain, and attract attention with the elegant label there as well.



Fruit beverages and lifestyles

Strong brands shape trends

Juices and fruit beverages are increasingly important elements of the lifestyle of a younger generation that seeks to unite good health and enjoyment and also takes pleasure in presenting it, both online and offline.

Producers that want to stay relevant cannot stand still; they must surprise consumers again and again, but remain true to themselves in the process. With authentic brand stories and a solid brand identity that creates trust, we remain relevant in the everyday lives of our consumers.

Our international position helps us considerably when it comes to generating enthusiasm with new products, varieties and flavour experiences. We often advertise trends and themes, such as vitamin-rich shots in support of daily well-being, turmeric in smoothies or the home-made fruit soft drink with a lemon-basil taste in juice sections before they are firmly established. The limited

edition of *YO Limonade* in Austria, for example, with which home-made lemonades can be mixed in seconds, was a great success. Embellished with water, ice cubes and fresh fruits or herbs and served in stylish glasses, they are perfect thirst quenchers for hot summer days with friends.

We no longer say “Shake it up” only in Lithuania, where Eckes-Granini is represented with the *Elmenhorster* brand. In 2013, our colleagues there presented three fruit juice blends for mixed drinks – Mojito, Raspberry Mojito and Piña Colada. The idea was well received, and not only among Baltic consumers. Passed on by the International Business Development Department, these non-alcoholic cocktails are now available in the French Overseas Territories as well.



Our international position helps us considerably when it comes to generating enthusiasm with new products, varieties and flavour experiences.



The Juice Category Journey

Eckes-Granini is leading the juice category into the future

Eckes-Granini grows when the fruit juice market grows. That is why we promote innovation outside of our own organization as well.

We accept responsibility for this category, in which we hold the lead in many countries, and are active beyond the boundaries of our Group – always in keeping with our promise to offer “The best of fruit for a healthy and enjoyable life”.

We are pursuing three objectives with the Juice Category Journey: greater market penetration, greater frequency and greater value. With these goals in mind, we ask ourselves and others what our customers want from us and what today's consumers expect from juice and fruit beverages. What occasions for consumption can we identify today and what new ones will the future bring? What do consumers know about the beneficial properties of our naturally healthy products and the many ways in which they can be used? And last but not least, how, exactly, do they make their daily and spontaneous purchasing decisions? We use extensive consumer, market and data analyses as well as our own studies as a basis from which to gain important insights that flow into product innovations, product range development, packaging, advertising and communication. We are evolving along with our

consumers and taking the experience of juice enjoyment to the next level.

We are guided by six clearly defined “Growth Drivers” as we proceed on our Category Journey and we identify the success factors for individual products on the basis of consumption data. We develop selling stories and campaigns that are tailored to the needs and wants of specific target groups in order to bring consumers and products together. In the Swedish market, for instance, we identified “Fuel the Day” and “Specific Health Needs” as the most important motives for consumption and thus as the key growth drivers for our category. *Brämhults* smoothies containing such trend ingredients as coconut milk, avocado and spinach are sold in the new 0.85-litre bottle for home consumption represented a logical upgrade of a range that takes consumers' wants and needs into account. In cooperation with the ICA supermarket chain, our largest retail partner, we developed a new concept design to attract more attention to fruit juice at the point of sale. The products were first grouped with reference to the two growth drivers we had



identified – “Fuel the Day” and “Specific Health Needs”. We then made sure that the fresh, vitamin-rich *God Morgon* products and *Brämhults*’ freshly-squeezed premium fruit juices were given the stage they deserve. They were moved from the refrigerated section, which was dominated by dairy products and corresponding visual imagery, into a modern chilled juice bar with a contemporary, urban look. Instead of pictures of cows and farms, the POS is now framed by appealing food photographs that

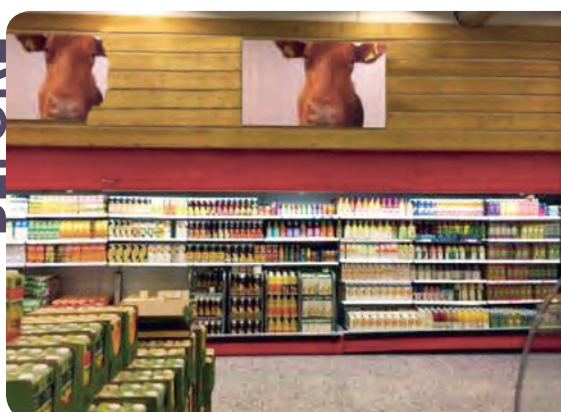
*We are evolving along
with our consumers and
taking the experience of
juice enjoyment to the
next level.*

make shoppers yearn for a glass of juice. According to the results of consumer surveys, the new design is very effective. The new look and feel have been well received and consumers finally have a chance to appreciate the diversity of the product offerings. Following the introduction of the new concept, revenues from sales in this category at Swedish test stores actually doubled. Plans now call for extension of the concept to other markets.

There is yet another dimension of our responsibility for the category. We are the first point of contact for the retail trade and a recognized expert in all matters relating to juice and fruit beverages. We do not see ourselves as sellers, but as a partner who helps retailers understand the new demands our common consumers pose with respect to fruit beverages and thus offers the right products at the right time, place and price. Many of our retail partners want to accompany us on this journey towards a better shopping experience in the juice shelves.

On the other hand, data on consumer shopping behaviour – both online and in stores – provided by food retailers is of great value for us. Combined with our own insights from market research, they help us gain a better grasp of consumers’ wishes and cater for them more effectively. We aim to apply the lessons learned in Sweden and Denmark throughout the Group as a whole. Our Category Development Teams are hard at work in a number of different national subsidiaries. In this way Eckes-Granini is paving the way for a successful future for the entire industry.

BEFORE



AFTERWARDS

Entrepreneurial responsibility

Inside and outside the bottle

As family enterprise, Eckes-Granini doesn't think merely in terms of business years, but rather in terms of generations. Thus environmental and social aspects have always been cornerstones of the entrepreneurial action.

By the time the European Union introduced the Eco Management and Audit Scheme (EMAS) in 1993 as a means of helping business enterprises improve their performance with respect to environmental protection, we had already incorporated the subject of sustainability into a system of our own. It is now firmly embedded in the Group-wide agenda, and is being developed progressively as a fixed component of the Group's business strategy.

"At Eckes-Granini, people make the difference, and people play a crucial role in our company's success." This guiding principle expressed in the Code of Conduct characterizes the corporate culture at Eckes-Granini. Other elements of that culture include passion and commitment, respectful treatment of others, openness, the will to bring about change and the courage to take decisions. Along with brands and profit-oriented management, people are identified as one of the three key pillars of success in Agenda 2020 "Grow to win".

Responsibility – from fruit to glass

We purchase our raw fruit material from suppliers all over the world – and always from regions in which the fruits in question naturally grow best and thus exhibit the best quality.

We apply high standards when it comes to sustainability – not only for ourselves and our employees but for our suppliers and other business partners as well. All of our suppliers – more than 100 in all – are evaluated with reference to aspects of sustainability by an independent organization called EcoVadis. And we also take part in this strict monitoring process. The Eckes-Granini Group received an outstanding rating in the audit conducted in May 2017 and currently ranks among the top 5 % of all participating corporate enterprises.

Within the specific context of orange cultivation in Brazil, Eckes-Granini supports the industry-wide initiative of the European Fruit Juice Association (AIJN) and is now working with producers and NGOs at the local level to bring about improvements in working conditions.

In February of 2019, the Group joined the Sustainable Juice Covenant, a global campaign coordinated by the Sustainable Trade Initiative IDH. As a participating organization, Eckes-Granini is committed along with other international beverage producers and suppliers to raising the percentage share of sustainable juices and smoothies continuously over the next twelve years, and reaching the target of 100 % by the year 2030.

Eckes-Granini goes Zero: reducing CO₂ emissions in production and logistics

As a member of the Zentrum für Nachhaltige Unternehmensführung (Centre for Sustainable Corporate Management, ZNU) at Witten/Herdecke University, Eckes-Granini is participating in the German "ZNU goes Zero" initiative.



This has set itself the goal of achieving climate neutrality by the year 2022. Eckes-Granini Deutschland aims to establish climate neutrality at all locations (Nieder-Olm, Bad Fallingb., Bröl) by 2020. We are also working with other national subsidiaries to achieve climate neutrality. In Germany, we are a founding member of the Lean & Green initiative, which is committed to reducing CO₂ emissions generated by logistics operations by 20 %. We have achieved this goal through a variety of measures, including a training programme in fuel-efficient driving. While our international purchasing expertise is concentrated at our headquarters in Nieder-Olm, Germany, production takes place at various locations throughout Europe. The design and continuous optimization of efficient and environmentally friendly processes requires a high level of commitment from everyone. At Eckes-Granini, every employee is an environmental protection officer.

A pioneer in the field of sustainable packaging innovations

When it comes to packaging, we are intent upon ensuring that valuable ingredients are protected, but also on conserving resources and the environment to the greatest possible extent.

We focus on systematic efforts to conserve packaging material and reduce the weight of packaging units while reducing CO₂ emissions, and on the use of recycled materials and PET made from renewable raw materials for *God Morgon EKO* in Sweden and *hohes C BIO* in Germany, to cite only two examples. We are investing heavily and Group-wide in new packaging technologies and now aim to reduce the weight of PET bottles by 10 % by the year 2020. We are planning to increase the relative share of recycled PET (rPET) used in our bottle to 25 % by 2020, and are now working on a long-term project devoted to a closed PET circulation system.

Eckes-Granini remains a pioneer in the field of packaging with the Plasmax technology. In this process, the inside surfaces of PET bottles are coated with an ultra-thin layer of pure glass, which provides reliable protection for the contents. This unites all of the advantages of PET and glass bottles: breakage resistance, low weight, convenient handling, optimum protection for vitamins and fresh taste. The

ultra-thin glass layer is washed out during the conventional recycling process, which means that the Plasmax bottle is 100 % recyclable. Eckes-Granini was the first European firm to introduce this new technology for use in the juice-bottling process.



Eckes-Granini remains a pioneer in the field of packaging with the Plasmax technology.



A rally tour to Paris on behalf of children with cancer: Team Rynkeby is our new Corporate Social Responsibility (CSR) lighthouse project

Founded by employees in Denmark in 2002, the Rynkeby cycling team is now the largest and most successful charity cycling team in Europe. The record sum of EUR 9.4 million was collected in support of severely ill children and their families in 2018 alone. In 2019 “Team Rynkeby – hohes C” will be the first German team to push the pedals for a good cause. All proceeds will be donated to the Deutsche Kinderkrebshilfe.



Storytelling and engagement: effective communication with added value

Today's consumers don't just buy products, they buy positive experiences as well. They want to trust, to identify with the brands they buy and to feel emotional bonds. Thus Eckes-Granini stands for far more than just fruit beverages.

We stand for good health and enjoyment, for friendship and family and for doing good for oneself and others.

We know our consumers, and we inspire each other – to more sustainable day-to-day behaviour or a more healthy lifestyle. We

make intensive use of the opportunities offered by new media to engage in direct, personal communication with our consumers and forge personal ties with them. We asked families in Hungary, for instance, to submit ideas for Christmas upcycling ideas for *SÍÓ* beverage cartons – and were overwhelmed by the response. We invited fans and

influencers in Belgium to develop recipes of their own using *granini* ingredients and to share them with us. We are now proudly presenting the results to our fans all over the world. What makes a good morning? We posed this question with *God Morgon* in Denmark and gave birth to a community in which people share both recipes and playlists and inspire each other to adopt better morning routines. For no matter what the day ahead looks like, the

powerful brands from Eckes-Granini will be there to bring the best of fruit for a healthy and enjoyable life.

We stand for good health and enjoyment, for friendship and family and for doing good for oneself and others.

Today, we want to do more than invest as much as possible in advertising and post effective ads and TV commercials. We want to tell stories, to generate enthusiasm – and, through targeted campaigns, to invite consumers and fans to play a part in our brand history in future as well.



The international business of the Eckes-Granini Group

Eckes-Granini stands for the best of fruit – not only in Europe, but all over the world. The Eckes-Granini Group is committed to a consistent international expansion strategy. National subsidiaries and strategic partners in Austria, Belgium, Denmark, Finland, France, Germany, Hungary, Italy, Lithuania, Romania and Bulgaria, Sweden, Switzerland, the Czech and Slovak Republics and Spain contribute to the success of the Group and its strong brands. While Eckes-Granini's successful brand activities are concentrated primarily in Europe, fruit juice lovers in more than 80 countries the world over, from Asia to the Middle East to the South Pacific, enjoy products exported by Eckes-Granini.

Having grown continuously since its founding in 1857, the Group now supplies markets all over the world with the *granini* and *Pago* premium brands as well as popular regional brands, such as *Brämhults*, *Elmenhorster*, *hohes C*, *Joker*, *Marli*, *Rynkeby* and *God Morgon*, *SIÓ* and *YO* in both the retail food trade and the out-of-home sector. Eckes-Granini is not merely a player, but rather the leading producer of fruit juices, fruit nectars and other fruit beverages in Europe.

The corporate identity of the Eckes-Granini Group is based on transnational values shared by its European companies, which are additionally enriched by cultural diversity. Thus the Group's powerful brands continue to evolve and be adapted perfectly to the needs of the various markets without sacrifice to their unique identities. The success achieved on the basis of this philosophy of international engagement in combination with strong local and regional roots is clearly reflected in the

sales figures. Eckes-Granini earns more than a third of its total sales revenue in its home market of Germany and nearly two-thirds in foreign markets – primarily in Europe. This success is made possible by our 1,725 highly qualified employees, who are passionately committed to bringing the best of fruit to people all over the world day in and day out.



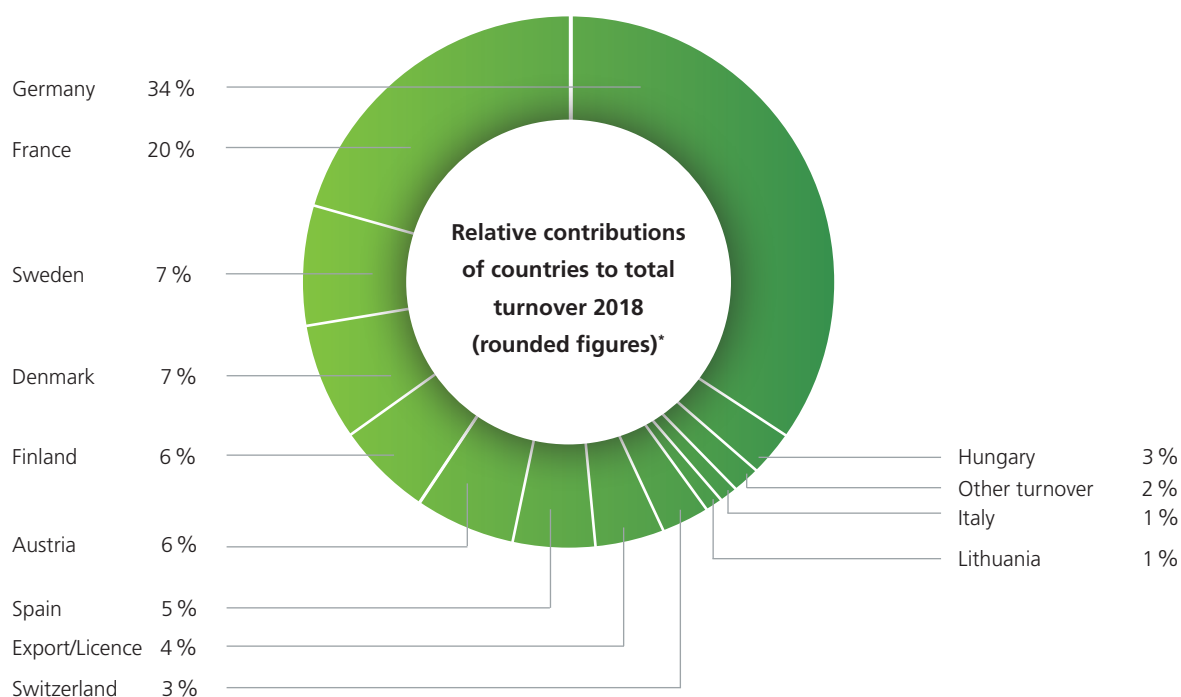
Country	Strategic brands	Value-based market share*	Market position retail food trade	Market position out-of-home
Germany	hohes C, granini	13.9 %	1	1
France	Joker, granini, Pago	7.7 %	3	1
Austria	hohes C, Pago	8,5 %	3	2
	YO	29.8 %***	1	n.a.
Belgium	granini	4.3 %	4	n.a.
Czech Republic	granini	2.7 %**	9	3
	YO	12.2 %**	3	n.a.
Denmark	Rynkeby, God Morgen, Brämhults	24.6 %	1	1
Finland	Marli, God Morgon	38 %**	1	n.a.
Hungary	SIÓ, hohes C	20.8 %	1	2
Italy	Pago	12.7 %****	n.a.	3
Lithuania	Elmenhorster, granini	24.2 %	1	n.a.
Romania	granini	7,3 %	5	3
Spain	granini, Pago	9.6 %	1	1
Sweden	Brämhults, God Morgon	18.6 %	1	1
Switzerland	granini, hohes C	9.0 %	1	2

|* Source: leading market research institutes, basis: value sales retail food trade

|** own estimate

|*** Share in fruitsyrup segment

|**** Share in out-of-home



|* Base: core business (fruit beverages)

Germany



GROWTH THROUGH INNOVATION

Broad market presence and successful product innovations: Eckes-Granini reaches more consumers than ever before.

Eckes-Granini reached nearly every second household in Germany through its powerful market presence and innovative new products in 2018. One of the strongest growth drivers was the highly successful extension of the *hohes C PLUS* range through the addition of three new varieties (*PLUS Calcium & Vitamin D*, *PLUS Zink* and *PLUS Provitamin A*), which was supported by a broad-based TV advertising campaign, digital media activities and out-of-home displays. Honoured with an EFFIE Award, the campaign was regarded as an



excellent example of effective brand communication. The impressive success of *hohes C PLUS* boosted volume sales in the entire segment tremendously and also resulted in an appreciable increase in Eckes-Granini's market share.

New range, new name, new bottle: *granini* appealed to premium shoppers, in particular, with the *granini Selection* premium range in the slim 0.75-litre bottle, and took the market lead in the respective segments with the Passion Fruit, Mango and Cranberry varieties. Here as well, the market leader underscored its role as a value and growth driver in the newly occupied segments.






The elegant packaging design for the premium concept was recognized with the Red Dot Design Award.



The launch of *Die leichte Limo* (Limo light) *Lemon-Mint* introduced one of the most successful product innovations in the German refreshment-beverage segment in Germany in 2018. With 50 % less sugar and no added sweeteners, the new sub-brand appeals to more health-conscious consumers and has a higher rotation rate than its competitors. Thanks to an entertaining and attention-getting ad campaign, brand awareness rating for the umbrella brand *Die Limo* rose significantly to a new record high of 94 %.

Eckes-Granini supports bar and restaurant operators in Germany with five non-alcoholic *granini* cocktails. With these high-quality premixes, practically anyone can produce cocktails in just seconds. Responses from customers have been positive, and plans for wider distribution are already in the making.

Eckes-Granini is conquering new segments and reaching more consumers than ever before with innovative new products.

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
 	13.9 %	▲	1	1
	3.5 %	▲	4	n.a.

France

MILESTONES ON THE ROAD TO MARKET LEADERSHIP



Added benefits for consumers bring new market shares




Like the fruits from which it is produced, 100 % fruit juice naturally contains sugar. With a new variety of *Joker Le Pur Jus*, Eckes-Granini developed one of the very first 100 % fruit juices with reduced sugar content. It contains 30 % less sugar and thus 30 % fewer calories. Volume sales of this innovative product made with coconut water have been impressive – with almost 3.0 million litres sold in 2018 alone. This range, which offers added health benefits, set a new milestone in the first year since its launch: the juice is already consumed in 4.4 % of all French households – a clear sign of its extraordinary relevance for consumers.

With *Joker Le Bio*, a fruit juice that contains only organically grown fruits, Eckes-Granini also achieved a solid second-

place ranking in the French market for organic juices. The *Pago* brand also recorded 10 % growth in the retail food trade. Thanks to the interplay of strong promotional activities, targeted advertising campaigns, appealing POS material and product innovations – all based on the needs of modern consumers – sales revenue rose by EUR 9.5 million.

The promising launch of a *Pago* smoothie in the out-of-home segment took place in 2018. The positive responses to the launch are a clear testament to the tremendous strength of the *Pago* brand, which was emphasized in TV commercials as well for the first time during the year. Besides, *granini* remains the unrivalled number-one in the out-of-home segment, with a market share of 25 %.

***Joker Le Pur Jus* with less sugar, *Joker Le Bio* and *Pago* were the growth drivers for Eckes-Granini in France in 2018.**

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
  	7.7 %	▼	3	1

Austria



PAGO IN AUSTRIA: A BRAND REINVENTS ITSELF

Eckes-Granini demonstrates innovative strength with a host of new products

On the occasion of its 130th anniversary, *Pago* opened a new chapter of its brand history in Austria: a new line of organic juices featuring the trend varieties of Naturally Cloudy Apple, Orange, Apricot and Orange-Carrot-Lemon offering the impressively intense natural flavours from the best of the (organically grown) fruit.



The brand's birthday was also celebrated with the launch of a special limited edition: "Guava – Banana – Pineapple". The first tasting was conducted with a small circle of selected journalists at the company's







original production site in Klagenfurt. Eckes-Granini provided new impulses in the syrup category with *YO Fruchtvoll*: This syrup containing 80 % fruit and 30 %

less added sugar also appeals to health-conscious juice lovers. With these three new low-sugar varieties, *YO* succeeded in defending and strengthening its lead in the syrup market.

The *hohes C PLUS* range makes a daily contribution to healthy nutrition – now with five different varieties. The successful market launch of *hohes C PLUS Zinc* was supported by colourful sleeves designed to ensure greater visibility on store shelves as well as in print advertising and out-of-home displays. *hohes C KIDS!* offers vitamin-rich refreshment that appeals especially to children. The best of the fruit, pure water, beneficial C, D and E vitamins and folic acid provide for natural drinking pleasure.



Less sugar, organic quality and added vitamins brought further growth for Eckes-Granini in Austria.

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
 reich an natürlichem Vitamin C	8.5 %		3	2
	29.8 % [*]		1	n.a.

¹* Share in fruitsyrup segment

#FLAVOURYOURDAY: GRANINI BELGIUM TURNS FANS INTO BRAND AMBASSADORS

Belgium



The focus on communication and engagement brings growth for Eckes-Granini

Community-building and call-to-action were important keywords for *granini* in Belgium in 2018. With the successful #flavouryourday cross-media campaign, which included print, online and display activities, the premium brand scored points in the Belgian market and boosted brand awareness as well. Fans and influencers developed original food and beverage creations with ingredients from *granini* and thus became brand ambassadors for the best of the fruit within their own communities. A selection of healthy and delicious recipes created by popular Belgian celebrities is posted in the social media, on the campaign website www.flavouryourday.be and at www.granini.com/cocktails.



The strong focus on communication and engagement with fans and consumers was boosted by six million coupons offered in print media. Through product presentations featuring sampling actions in shopping centres and at highly frequented locations and through dedicated sales activities – for example at small stores along the Belgian coast – the Belgian team impressed consumers with flavour and natural quality. All in

all, Eckes-Granini recorded organic growth of 10 % in Belgium.



10 % revenue growth in a generally declining market environment:

2018 was a good year for *granini* in Belgium, where awareness of the premium brand rose once again.

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
granini®	4.3 %	▲	2	n.a.

Bulgaria

CONSOLIDATION OF MARKET POSITION
THROUGH STRATEGIC NETWORK



Growth for Eckes-Granini in Bulgaria boosted by product innovations and a stronger still fruit beverages segment

granini is celebrating its 10th anniversary and much, much more in Bulgaria. Volume sales of the brand reached a record level in a generally declining market.

One successful product innovation was the “granini din Gradina” fruit-and-veggie subrange. This convenient and naturally vitamin-rich complement to a varied daily diet offers a combination of 100 % fruit and vegetable juices.

The launch of the subrange comprising two new varieties was supported by TV advertising, a social media campaign and POS materials.

In order to strengthen its position in the fruit beverage market and in addition to the juices and nectars from granini, Eckes-Granini acquired the Prisun brand in



mid-2018. Prisun is the leading brand in the still fruit beverages segment in Bulgaria. In future, production and sales will be managed by Quadrant Beverages, a subsidiary of Karlovarské minerální vody, Eckes-Granini’s strategic partner in the Czech Republic. The brand re-launch was supported by extensive TV advertising and promotional activities at POS.

Through this engagement, Eckes-Granini is strengthening the entire still fruit beverages segment in Bulgaria, stabilizing its own market position and establishing closer ties within its network of strategic partners in the region.



Eckes-Granini’s achievement in Bulgaria: growth with brand quality in a generally declining market.

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
	11.2 %		3	n.a.

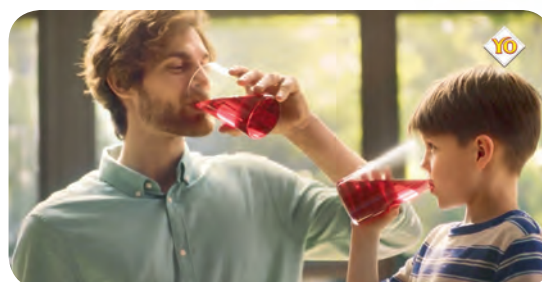
NEW RECORD VOLUME SALES AND MARKET SHARES

Czech and
Slovak
Republics



YO syrup was successful in a difficult market environment





In cooperation with its long-standing strategic partner Karlovarské minerální vody, Eckes-Granini achieved outstanding results with the YO syrup brand in a difficult market environment. Business Year 2018 ended with the highest sales volume and the largest market share in the history of the successful international brand in the Czech Republic. YO appealed above all to families – its core target group – with a mix of traditional TV advertising, digital campaigns, tailored sales activities, tastings and attractive displays.



granini Orange, the traditional bestseller in the Czech Republic, was embellished with an exotic twist. The new Orange-Mango variety was a total success, and now ranks fourth in popularity among the nine *granini* varieties sold in the country. The new-product launch was supported by social media activities and digital TV advertising, tasting events and attention-getting secondary placements.



Eckes-Granini achieved success in the Czech Republic with tailored advertising and sales concepts. Premium shoppers were particularly impressed with the new *granini* Orange-Mango variety.

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
	2.7 % *		9	3
	12.2 % *		3	n.a.

|* own estimate

Denmark

NUMBER ONE IN THE REFRIGERATED SECTION / GROWTH WITH CHILLED JUICES



God Morgen takes the market lead in the organic-juice category





In a modern look and with the definite distinguishing feature of organic quality, *God Morgen* moved into first place in the chilled segment during the past business year. The 0.85-litre PET bottle introduced in late 2017 proved to be an attractive eye-catcher in the refrigerated section and has already become a symbol of this popular brand.

The launch was supported by investments in advertising. In addition to out-of-home media activities, the brand also invested in a social media campaign focused on optimum morning routines for specific target groups. With a keen sense of consumers’ needs and lifestyles, the brand maintained its good relationships with existing customers and forged new ones as well. All in all, the market leader in the chilled segment reported a value-based market share of 35 %. Plans call for continuous expansion of the EKO range. Two new varieties are to be introduced in early 2019.

In addition to its diverse and innovative product portfolio, another secret of *God Morgen*’s success is its insistent engagement on behalf of the optimal placement of refrigerated display cases designed specifically for the brand in the retail trade, which was pursued with success again in 2018.



God Morgen achieved a market share of 35 % in Denmark and extended its market lead in the chilled juices segment significantly with a unique packaging design and a new EKO range.

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
  	24.6 %		1	1

ON TRACK FOR GROWTH IN FINLAND

Finland

Market share gains for Eckes-Granini in the chilled segment

The impact of an unusually hot summer in Finland was also evident in the growth figures for *Marli*, *God Morgon* and *Brämhults*. Together, revenue from sales in both the chilled and ambient segments rose by 7 % – much the same as in the syrup segment, which was among the most successful categories during the summer months. But nothing matched the performance of smoothies, the fastest growing category in 2018, which posted a 40 % increase in sales revenue.

Numerous product launches and pioneering new products reflect not only the innovative and sustained strength of these brands, but also the strong emphasis placed on responding to the needs of modern consumers. The successful launches of the chilled *Marli SHOT* range and the *Mehukatti* children’s drink in organic




quality offered eloquent proof of that. Furthermore, a demand-based, customer-oriented category segmentation project was started with Kesko, our second-largest retail partner in Finland – within the context of the intensive focus on Eckes-Granini’s Juice Category Journey.



Eckes-Granini in Finland also set the tone in communication in 2018. The *Marli Juissi* on-pack promotion supported by social and outdoor media was a major success – over 400,000 downloads were recorded.



Thanks to the successful positioning of *Brämhults* smoothies by SOK, our largest retail partner, we achieved extraordinarily high growth in this segment. Eckes-Granini initiated a cooperative arrangement with the Kesko retail chain within the context of the Juice Category Journey.

Strategic brands		Value-based market share	Change over previous year	Market position retail	Market position out-of-home
 		38 %*		1	n.a.

|* own estimate

Hungary



MARKET LEAD EXTENDED

Achieving success with strong core competencies

Sió-Eckes looks back over an outstanding Business Year 2018. Turnover rose by 10.5 %. The *SIÓ Light* reduced-sugar subrange alone posted 54 % growth, thus making *SIÓ* the number-one brand in the fruit beverage market once again. The secret of this success was a combination of a strong focus on the company's own core competencies, strategic communication, operational efficiency and added value for customers.



The family-oriented Christmas campaign was an overwhelming success. On the basis of the creative upcycling idea, *SIÓ* beverage cartons became Christmas decoration – and the brand's market share rose to 16.4 %, further strengthening the market leader position of *SIÓ*.

The internationally successful *hohes C PLUS* subrange also contributed to a good result for Eckes-Granini in Hungary with double-digit growth. The launch of a new variety featuring the "sunshine" vitamin D, combined with targeted strategic advertising focused on the specific added benefits offered by each variety, sharpened the profile of the subrange as a whole.

Sió-Eckes is a strong partner for families outside of stores as well. 800 fully packed schoolbags were presented to financially disadvantaged first-graders within the framework of the CSR project known as the "Köszí SIÓ Program!". A total of 11,000 schoolbags have been distributed since the project was initiated 11 years ago.

Sió-Eckes strengthened its market lead in Hungary with a strong focus on its own core competencies and values as well as strategic advertising.

Strategic brands

Value-based market share

Change over previous year

Market position retail

Market position out-of-home


hohesC
 reich an natürlichem Vitamin C

20.8 %



1

2

Italy

PAGO GOES ORGANIC



Pago back on track for growth with innovative drive in Italy



In the face of a constantly declining market environment, *Pago* was the first and thus far the only major brand to introduce a new range of beverages in organic quality for the out-of-home trade in Italy. The organic range was launched in the autumn of 2018. This choice of time made it possible to use freshly harvested fruits from selected organic farming operations to create the intensive taste experience offered by the new products. Like the entire *Pago* range, the new organic line featuring five different varieties is sold only in the out-of-home trade, where it is promoted with eye-catching materials at the point of sale. Given the strong growth of the organic market in Italy, the new range is expected to play a key role as image driver in the future development of this traditional brand.

The sustainable development of this range is a key priority of our long standing partner San Pellegrino.

The new claim – “The Essence of Fruit. Since 1888” reflects *Pago*’s self-image as the specialist in fruit juice that offers special flavour experiences and moments of intense enjoyment.



Pago is the first major brand producer to offer juice in organic quality for the out-of-home market.

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
	12.7 %*		n.a.	3

!* Share in out-of-home

Lithuania

TRUST IN
THE BRAND CORE



Elmenhorster gains ground in Lithuania with a regional focus and innovative power – granini builds its lead in the premium segment

The fruit beverage market in Lithuania showed growth – in both volume and revenue – for the first time in years. Business figures both reflect and surpass the positive market trend. Eckes-Granini maintained its market lead in Lithuania by a wide margin.




Elmenhorster’s market-share gain was achieved without line extensions or new products. Eckes-Granini concentrated solely on its basic product portfolio and invested in traditional advertising and POS activities, while relying above all on the appealing qualities associated with

Lithuania’s most popular fruit juice brand: regional focus and innovative power.

Water+ scored points with two new varieties in trend flavours: Water+ with Lime and Mint and Water+ Passion Fruit and Strawberry. The successful product launch was supported by print and radio advertising as well as influencer marketing. Volume sales of Water+ doubled as compared to 2017.

granini remains the unrivalled number one in the premium segment. The marked growth in Lithuania was powered above all by the brand strategy – which included cooperative activities and sponsoring at major events.

Eckes-Granini posted further growth and extended its market lead in Lithuania with Elmenhorster, Water+ and granini.

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
 	24.2 %		1	n.a.

NEW TASTE LIKE FROM THE GARDEN

Romania



granini launches an impressive new fruit-and-veggie subrange in Romania

2018 was a good year for *granini* in Romania. In cooperation with our partner URBB, we succeeded in increasing our share of the growing national fruit beverage market – in terms of both volume and sales revenue. Special highlights included the seasonal limited editions. “Caribbean Summer” offered juice drinkers a refreshing South-Seas feeling with the Piña Colada and Guava-Lime varieties inspired by the popular cocktails; and during the winter, *granini* warmed the hearts of consumers with the “vis de iarnă” (Winter’s Dream) limited edition featuring two varieties

with Christmas spices. The plum juice with a delicate aroma of marzipan and the Baked-Apple-Cinnamon variety can be served hot. TV commercials and social media campaigns supported the launches of these two limited editions.

The biggest launch of the year was “*granini din Grădina*”: Homemade fruit and vegetable juices are traditional favourites in Romania. With the new fruit-and-veggie range, the premium brand offers garden-quality flavour and a healthy, superior-quality supplement adding value to everyday family life, which is changing in this country as well. The first variety is a combination composed of apple, carrot, mango and beet juice. The second offers special moments of enjoyment with a blend of sweet-potato, carrot, mango and orange. Both products consist of 100 % fruit and vegetable juice. The launch was supported by TV advertising and a broad-based influencer campaign. *granini* was active the year round with POS activities in support of the whole range in both the modern and traditional beverage trades.

Aside from a keen sense of distinctive local factors and consumer needs, another important contributor to success was the consistent advertising strategy pursued in recent years, which is based on the successful “fruits love *granini*” communication platform.

Eckes-Granini continues to grow in Romania. The premium brand achieved a small market-share gain in terms of both volume and sales revenue. The fruit-and-veggie subrange “*granini din Grădina*” caters successfully for new consumer needs.

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
granini®	7.3 %	▲	5	3

Spain

ECKES-GRANINI IBÉRICA SETS A MILESTONE IN THE SPANISH MARKET



A modern brand image and focused communication: an ideal combination powers outstanding volume sales




With the integration of the “Special Flavour” range into the modern *Selección* premium concept in Spain, *granini* achieved its largest market share ever. The single-fruit varieties – Pear, Banana, Pink Grapefruit and Apricot – were relaunched and the new Mango variety was introduced in the characteristic premium design. The modern appearance of the label on the 1-litre PET bottles underscores the trend character and the premium quality of this range. A strong communication campaign in both the retail trade and the out-of-home market accompanied the launch of the *Selección* range. The interplay of the TV commercial shown on all national TV stations, digital media activities and supporting measures at the POS attracted considerable attention to the range. This great success – which represents milestone in the history of Eckes-Granini Ibérica – is clearly reflected in a



48 % gain in product rotation. Thanks to the halo effect, this breakthrough also impacted on the umbrella brand *granini* and resulted in a 10.1 % increase in sales revenue. In view of these outstanding results, plans call for the extension of the TV campaign in 2019.

With the introduction of the *granini Fruti Zero* range in 2017, Eckes-Granini Ibérica added a new variety conceived specifically for households with children to its line of 0.2-litre packs. It offers the best of fruit with no added sugar. In order to draw more attention, the popular beverage cartons were adorned with various film motifs from *The Incredibles 2*. The success of the licencing agreement with Disney® had a positive impact on volume sales: 32 % growth is directly attributable to this licencing arrangement. A digital media campaign gave an additional boost to volume sales during the second half of the year, resulting in 7 % overall growth in volume sales of the small packaging units.

Eckes-Granini reached new consumer groups in Spain with new products designed specifically for children. The *Selección* premium concept achieved the largest market share since the range was introduced with a new subrange supported by intensive advertising.

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
 	9.6 %		1	1

Sweden

A STRONG FOUNDATION FOR STRONG BRANDS



New paths to success – Brämhults and God Morgon seize opportunities for growth

The fruit for *Brämhults* products had been pressed in the Swedish town of Borås for more than 60 years – before the first *Brämhults* juices left the production line in Ringe in early 2018. The new production plant in Denmark makes it possible to introduce new packaging formats and ensure longer shelf life for the company's characteristic juices. Each batch is processed from seasonal fruits, and is thus unique – a distinctive feature that is emphasized on the “Ny smak varje dag” (“New taste every day”) advertising platform. Tremendous growth was achieved in sales of *Brämhults* smoothies, which were offered in a large format in the 0.85-litre bottles for home consumption for the first time in 2018. In combination with targeted campaigns and events, new recipes featuring such trend ingredients as coconut milk or avocado and spinach

attracted considerable interest in the smoothie range. The result: 163 % growth in volume sales.



In addition to launching a new, iconic bottle, *God Morgon* also introduced several new, balanced recipes. At the same time, the brand presented itself as a reliable partner for a healthy start in every day through the “Till alla er... God Morgon” (To all of you... God Morgon) campaign, which was shown on TV, in digital media and in out-of-home displays. Supported by this kind of commitment, *God Morgon* served as a value-driver and fuelled growth in the entire organic-juice segment.

Rynkeby looks back at a “Year of the Shot” in Sweden. The market leader responded to the persistently growing tendency in favour of massive daily doses of vitamins with its existing trend varieties, such as Ginger-Turmeric, as well as flavour innovations, including Beetroot and Blackcurrant with Chilli. Volume sales more than doubled over the course of the year.



Eckes-Granini focused particular attention in Sweden on the subject of category development. A pilot project in cooperation with ICA, Sweden's largest retail partner, has already brought early success. Both category awareness and volume sales rose significantly in the test stores.

The move of Brämhults production operations to the new location has been completed. The team is now devoting itself to new tasks and driving the category ahead. With help from Eckes-Granini, ICA has developed a new concept for an innovative product presentation in the juice shelf.

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
 	18.6 %	▼	1	1

Switzerland



ON TRACK FOR SUCCESS WITH NEW PRODUCTS

Eckes-Granini moves the Swiss market ahead with a modern, innovative strategy

Eckes-Granini has closed a market gap in Switzerland, and achieved strong success with a new concept: the new *granini* ambient smoothie range of healthy between-meal snacks. The two varieties sold in practical 0.33-litre PET bottles are ideal for people on the go. The two newcomers have been welcomed by consumers and retailers alike. Feedback on both “Happy Yellow” with Mango-Passion Fruit-Orange and “Lovely Red” with Peach-Raspberry-Strawberry has been positive. The new range’s core message – “Joy from the fruit” – is expressed not only through outdoor, online and POS communication, but also on the cheery, modern product labels.






New occasions for consumption also played an important role in the launch of the new *hohes C PLUS* subrange. The two new varieties – *hohes C PLUS Iron* and *hohes C PLUS Magnesium* – offer added value for health-conscious consumers who associate juice with extra benefits for everyday well-being. Advertising support for the line extension was provided in the form of out-of-home displays and POS activities.



bottles in 2017 was the right one for *hohes C*. That is particularly evident in the strong positions of Eckes-Granini brands in this segment – among both juices and smoothies.

The convenience segment is still a growing market. The decision to convert from cartons to handy 0.25-litre PET

To an increasing extent, *hohes C* stands for a daily contribution to health and well-being for people at home or on the go in Switzerland. New, innovative products in the ambient segment and the conversion to handy PET bottles have given the brand a new image.

Strategic brands	Value-based market share	Change over previous year	Market position retail	Market position out-of-home
<div> <small>reich an natürlichem Vitamin C</small> </div>	9.0 %		1	2

Other countries

BUSINESS UNIT: INTERNATIONAL BUSINESS DEVELOPMENT



The International Business Development Unit (IBD) ensures that a growing number of consumers around the world can enjoy the best of fruit. It does so by uniting the outstanding character, quality and strength of our brands with the local expertise of our distribution partners.

The IBD generates sustainable growth in Europe with partners in Belgium, Bulgaria, the Czech Republic, Italy and Romania (see the respective country reports) as well as other countries all over the world. With a combination of export activities, partnerships, innovative marketing concepts and targeted sales activities, it contributes to growth from which all stakeholders benefit. *Pago* sales rose under the influence of effective cooperation with our local partners in Croatia, Russia and Great Britain. This brand, which is marketed primarily in the out-of-home segment in these countries, improved upon its solid market position.

Thanks to a growing network of partnerships and innovative promotional activities, *granini* stands for the best of fruit in the eyes of increasing numbers of people in Asia, the Middle East and other regions beyond the borders of Europe. The brand is sold in more than 80 countries.



With innovations in taste and concept, *Réa*, *Joker* and *Diego* defended their leading positions in the French Overseas Territories. Social marketing, closeness to consumers and attractive promotions

helped our strong partners develop the brands further. *Réa* and *Joker* are also available in the Maghreb and western Africa and are expected to gain ground along with a growing middle class in these regions.

Supported by our long-standing partner SFBT, our sparkling apple refreshment brand *Ap/la* successfully defended its segment lead in Tunisia.



Key Business Figures

Profit and Loss Statement (in million EUR)	2014	2015	2016	2017	2018
Volume sales in million litres*	885.5	822.2	840.0	858.1	907.6
Net sales in million EUR*	876.3	841.7	893.4	973.6	984.7
Purchases	-472.7	-424.1	-462.2	-516.5	-539.1
Personnel costs	-102.1	-101.1	-110.4	-124.8	-126.2
Depreciation	-30.3	-32.8	-33.7	-36.9	-38.0
Other expenses/income	-195.0	-194.9	-201.0	-208.4	-209.5
Earnings before Interest and Taxes (EBIT)	76.2	88.7	86.1	87.0	72.0
EBIT margin	8.7 %	10.5 %	9.6 %	8.9 %	7.3 %

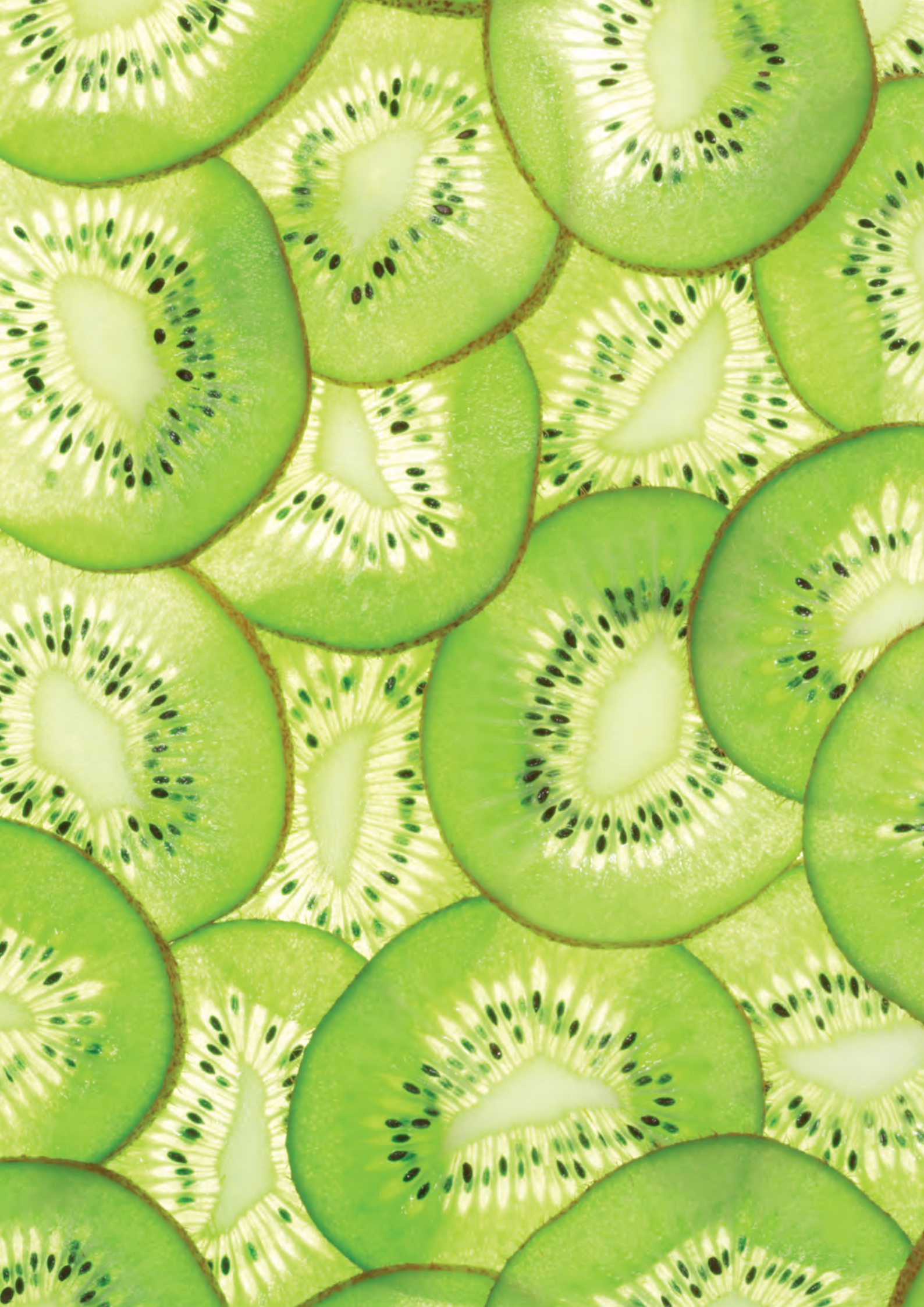
!* including licensed business

Commentary

Profit and Loss Statement

The Eckes-Granini Group built upon its leading position in the European fruit beverage market, and increased its value-based market share to 11.9 % (2017: 11.3 %) during the past business year. Net sales rose to EUR 985 million in 2018 – a gain of 4.9 % over the preceding year. Turnover amounted to EUR 938 million in 2017, adjusted to account for EUR 35 million in sales revenue from the partnership between the Danish subsidiary Rynkeby and the British smoothie producer innocent. That partnership was dissolved by Eckes-Granini in 2018.

Volume sales rose to 908 million litres (2017: 858 million litres), an increase of 6 %. Due to substantial external cost effects and essential investments in the supply chain, the Eckes-Granini Group reported earnings before interest and taxes (EBIT) of EUR 72 million, and thus fell somewhat short of the very good results of the previous year (EUR 87 million).



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ECKES granini

the best of fruit