

# Exporting fruit juices to Europe

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Europe is the largest market for fruit juices in the world, representing 55% of the total world imports. The import continues to grow, in spite of the decreasing consumption of retail-packed juices. This is because imported juices are increasingly used as ingredients in different types of beverages. Large importing and consuming markets such as Belgium, the Netherlands, France, Germany and the United Kingdom continue to offer opportunities for exporters from developing countries. The best opportunities can be found in the high-value segments of not-from-concentrate (NFC) juices, superfruit juices and the use of fruit juices as ingredients in soft-drink “detox” beverages. Exports to Europe are generally done as semi-finished product (bulk tanks, drums, containers), packing of consumer products is done by European bottling companies.

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## 1. Product description

Regarding trade classification, all fruit juices are classified under the four-digit code 2009 by the [Combined Nomenclature](#) (Eurostat) and by the [Harmonised System](#) (World Customs Organisation). When “fruit juice” is referred to in this survey, it involves both single-strength and concentrate as specified in the different eight-digit codes under code 2009, unless stated otherwise.

### Product definition

Generally, fruit juice is defined as the unfermented liquid of the edible part of the fruit. Although juices can be made by squeezing of fresh fruit, the majority of fruit juices on the world market are made from raw materials such as concentrated juices or purées. Fruit juices may contain pulp but do not contain:

- pieces of shell;
- seeds;
- coarse or hard substances;
- excess pulp.

Juice intended for export is usually concentrated and later reconstituted with water. This is because of practical reasons for lowering transport costs. In this way, transport costs for water and packaging can be saved.

Fruit purées and concentrated fruit purées are used in the manufacturing of specific juices (such as strawberry, peach, apricot, and so on). They are obtained by suitable processes; for instance, by sieving, grinding and milling the edible part of the whole or peeled fruit, without removing the juice.

Vitamins and minerals can be added to fruit juices. You can find approved list of additives in the European Regulation on the [addition of vitamins and minerals](#) and in the regulation on [food additives](#). Other allowed ingredients include restored flavour, pulp and cells.

The name “fruit juice” is reserved for 100% fruit juices. However, if sugar, sweeteners or acid are added to fruit juice which is diluted with water, the product must be called nectar or fruit drink.

## Product Specification

### Quality

According to industry practice, the most important quality requirements for fruit juices are defined by the following parameters.

- Colour: characteristic of the type and variety of fruit.
- Flavour and odour: distinct fruit flavour and odour, free from foreign flavours and odours.
- Brix level: quality of concentrated fruit juices, mainly defined by the Brix level (sugar content of an aqueous solution). The Brix level directly influences the price of the product. For products not from concentrate (NFC) a minimum Brix level is obligatory.
- Composition: the share of different types of juices in the case of mixed juice.

Additional quality requirements are as follows.

- Pulp content: pulp content is a quality indicator for certain types of juices, such as orange or pineapple. Importers may require more pulp content, as visible pulp in juices is becoming more popular among European consumers.
- Acid level: in addition to the Brix level, the citric acid level is the most common parameter that influences the quality and price of some juice products.

European [Directive 2001/112/EC](#) and [Directive 2012/12/EU](#) define the composition of:

- fruit juices;
- concentrated fruit juices;
- dehydrated fruit juices;
- fruit nectars.

The reserved names, manufacture and labelling characteristics of the above products are also defined. Those directives also define the minimum Brix levels for reconstituted fruit juice and reconstituted fruit purée. The [Fruit Juice Directive](#) was updated the last time in 2012.

### Labelling

The product must be labelled as fruit juice, concentrated fruit juice or fruit nectar.

Fruit nectars must declare a percentage volume of the fruit juice on the packaging. However, imports of nectars are not very common in the majority of the European countries.

The labelling of concentrated fruit juice, not intended for delivery to the final consumer, shall indicate the presence and quantity of added lemon juice, lime juice or acidifying agents.

In the case of retail packaging, product labelling must be in compliance with the European Union Regulation on [food information to consumers](#). This regulation more clearly defines the nutrition labelling, origin labelling, allergen labelling and legibility (minimum font size for mandatory information).

In the common case of export bulk packaging, the information required above must either be placed on the container or be given in accompanying documents. "Fruit juice or concentrated fruit juice" as well as the name and address of the manufacturer or packer must appear on the container. It is common that product specification declares the Brix and acid level.

## Packaging

The most common export types of packaging for concentrated fruit juices are aseptic or sterile filled:

- bag-in-box 20 l;
- plastic container 20 l;
- steel drum 200–250 l;
- plastic drum 200–250 l;
- stainless steel container (200–800 l);
- foldable container, usually 1,000 l;
- truck tankers, usually 25,000 l.

Regarding retail packaging, most fruit juices on the European market are sold in cartons, followed by plastic and glass.

### Tip:

- For more information about the evaluation of the quality, identity and authenticity of fruit juices, see the [Code of Practice](#) developed by the European Fruit Juice Association. If you subscribe to this Code of Practice or if you become a member of [SGF](#), you will have access to specific reference guidelines and analytical data.

## 2. Which European markets offer opportunities for exporters of fruit juices?

Belgium, the Netherlands, France, Germany and the United Kingdom offer opportunities for exports of fruit juices. In addition to the largest markets, opportunities can be found on the emerging markets of Central and Eastern Europe as well as on growing markets such as Poland.

### Imports

#### Import of fruit juices continues to increase slowly to Europe

- The import of fruit juices in Europe over the last five years grew by 2%, both in value and in quantity, reaching € 7.7 billion or 7.6 million tonnes in 2017. Internal European imports are growing by an average annual rate of 3%, while the import from developing countries is growing by an average annual rate of 2%.
- Although there is an overall trend of decreasing consumption of packed fruit juice on mature markets such as Germany, especially by volume, the supply of raw materials such as concentrated juices still provides opportunities for exporters from developing countries. This is due to the fact that imported fruit juices are used as ingredients for the production of different types of beverages or in other food industries and not only for the production of 100% fruit juices.
- The industry is also actively campaigning to reverse the negative trend started by health concerns, trying to find a new appeal to consumers. Sustainability and new formulations with exotic ingredients are an

important part of this response. For example, see the campaign by the [German fruit juice industry](#) supported by the EU “juice naturally” ([Naturlich mit Saft](#)) and the campaign highlighting the sustainability of orange juice production [Fruit Juice Matters](#).

- Although several European countries have shown a decline in import over 2017, this import decrease rate is generally smaller compared to 2016. However, all leading importing countries had positive import growth in 2017 comparing to 2016. Since 2013, the Netherlands has increased its imports of fruit and vegetable juices by 187,000 tonnes, France by 145,000 tonnes, Germany by 147,000 tonnes and the United Kingdom by 196,000 tonnes.
- The largest import growth over the last five years was found in NFC orange juice and mixtures of fruit juices.

## Five large importing countries for fruit juices in Europe

- There is no single country in Europe which dominates the import market and therefore export opportunities can be found in several countries. The largest quantities of imported fruit juices are shared between the five largest importers, which have similar import shares. The largest importers (the Netherlands, France, Germany, the United Kingdom and Belgium) together share almost 80% of the total European imports.
- In addition to the largest importing countries, a constant growth of imports is also noted in Central and Eastern European countries such as the Czech Republic, Romania and Bulgaria.

## Brazil leading supplier to the European market

- The supply of fruit juice to Europe is headed by Brazil, followed by different European countries.
- In addition to Brazil, important external suppliers of European fruit juices are Costa Rica, Turkey, Mexico, Argentina and Thailand.
- Among the largest suppliers from developing countries, countries gaining European market share over the last years were Vietnam (42% average annual growth rate; tropical juices and pineapple juice), Egypt (76%; orange juice), the Philippines (27%; coconut water and concentrated pineapple juice) and Peru (different tropical juices such as passion fruit and others).

## Orange juice most imported fruit juice in Europe

- The largest share of European imports of fruit juices is made up of concentrated orange juice, followed by mixtures of fruit juices and apple juice. The supply of concentrated orange juice is dominated by Brazil, which is a very strong competitor to other developing countries. However, opportunities can be found in the export of tropical and exotic juices which are not produced in Europe.
- The fruit juice types which showed an increased import to Europe over the last five years were not-from-concentrate (NFC) orange juice, followed by mixtures of juices, single-citrus juice (lime and lemon) and pineapple juice.

### Tips:

- In addition to targeting the largest import markets in Europe, consider countries that are showing growth in imports such as Central and Eastern European countries.
- Learn from exporters in developing countries who are gaining share on the European market, such as Egypt, Vietnam, the Philippines and Peru.

## Exports

### European exports of fruit juices mainly intra-European

- Since 2013, European exports of fruit juices have increased by an average annual rate of 2% in both value and quantity, reaching € 6 billion or 5.7 million tonnes in 2017.
- The largest part of exported fruit juices consists of concentrated and not-from-concentrate orange juice (31%). A large part of this export is represented by re-exports of imported orange juice from Brazil. The

European-produced juice with the largest export share is concentrated apple juice.

- The European countries with the highest export growth in quantity over the past five years were Romania (25% annual growth; especially NFC orange juice), Cyprus (22%; especially single-citrus juices) and the United Kingdom (16%; especially in mixtures of fruit juices).
- About 90% of all European Union exports are intra-European. The main external destinations are the United States, Japan, Russia and Switzerland.
- The largest external destination market that showed considerable growth over the past five years was the United States, with an average annual growth rate of 24%. The reason for this growth was three high seasons for apple production in Poland, where concentrated apple juice was produced and exported at very low and competitive prices.
- In addition to the United States, other export destinations with increasing growth rates were the Dominican Republic (specifically the import of orange juice from Spain), the Republic of Korea (grape juice and mixtures of juices) and China (grape juice and orange juices).

### Tips:

- Learn from European exporters about destinations which are increasing imports. Stay informed about the European industry via [the European Fruit Juice Association](#) and its member associations.
- Belgium and the Netherlands are the largest trade hubs for fruit juices in Europe. Consider exporting to these countries, especially if you are exporting a tropical type of fruit juice.

## Production

### Decline in production of fruit juices and nectars in Europe

- After several years of decline, the production of fruit juices and nectars in Europe is again increasing. The production of fruit juices in Europe is represented by the processing (bottling and blending) of raw fruit juices which are imported or locally produced. In addition to the fruit juice industry, a large proportion of imported concentrated fruit juices and purees are used as ingredients in soft drinks, sport drinks and other types of fruit drinks.
- The total sold production of fruit juices and nectars reached € 9.8 billion in 2017, which is an increase from 2016.
- The production of private-label juices decreased more than the production of branded juices.
- The most-produced type of juices in Europe are orange juices (24%). Other important types of juices produced in Europe are mixtures of juices (21%), apple juices (15%) and grape juices (8%).
- The largest volume of fruit juices in Europe is produced (bottled) in Germany, followed by Spain, Italy, Poland and Austria.

Note that the figures above display the production of manufactured goods, which include intermediate goods as well as final goods. This implies that it is possible that there is overlap in production data and import data, since raw materials may be imported and further processed.

### Tips:

- Regular information about crops, processing and the market situation can be found on the leading European information service for processed fruit and vegetables [FoodNews](#).
- Due to climate conditions, exotic fruits are rarely grown in Europe. This opens up opportunities to introduce exotic products and flavours that cannot be produced domestically into the European market.

## Consumption

### Decreasing trend of fruit juice consumption in Europe

- The consumption of chilled and not-from-concentrate juices has increased, although the overall fruit juice consumption fell in 2017.
- It is likely that the decrease in the consumption of fruit juices at the retail level in Europe will continue in 2019, though at a much slower rate, and that it will remain stagnant or even increase in the next few years. The main reason for the juice consumption decrease is the consumer awareness of the high sugar level in juices.
- The largest consumption of fruit juice and nectary in Europe in 2017 was found in Germany (2,342 million litres), followed by France, the United Kingdom, Poland and Spain. However, the country with the largest consumption of fruit juices in Europe per capita is Cyprus, with an annual consumption of 30.6 litres per person. It is followed by Malta, Germany, Austria, the Netherlands and Sweden.
- Considering uncertainties in the Brexit process, the European Fruit Juice Association expects that the European market for fruit juice will slightly decrease in 2018 but again increase in 2019. By 2023, the EU consumption of fruit juice and nectars is forecast to reach around 8.2 billion litres. Eastern European markets such as Poland, Hungary and the Czech Republic, driven by economic growth, are predicted to have the highest increase of consumption over the forecast period.
- The most popular flavours are orange (36.5%), flavour mixes (19.2%), apple (15.7%), peach (3.5%) and pineapple (3.3%).
- Apple remains a staple flavour in the large apple-growing countries of Germany, France, Austria and Poland. Peach and pineapple are popular in southern EU countries such as Spain and Italy.

#### Tips:

- You can find opportunities in exotic juices, as these are not produced in Europe.
- Consider exporting specific types of juices which have increased in demand, such as juices with an increased amount of pulp, superfruit juices, not-from-concentrate juices and organic juices.
- New flavour mixes are another opportunity, and these can be developed in close cooperation with European processors and bottlers. So invest in product development facilities in order to meet the demands of curious European buyers.

## 3. What trends offer opportunities on the European market for fruit juices?

Opportunities exist in the following trends:

- Lowsugar and “superfood” products are appreciated by consumers. Due to this trend, nectars, soft drinks and flavoured waters which are naturally sweetened are more promising. More sweeteners such as stevia, lucuma or coconut water will be used in beverages.
- Food safety certification supported with frequent laboratory tests can additionally provide a great advantage for suppliers to the European market.
- Corporate social responsibility standards are also becoming more important.
- Consumer interest in vegan, glutenfree and natural food also offers opportunities for exporters from developing countries.
- The consumption of organic products is increasing in Europe and is positively influencing the consumption of juices. Therefore, the consumption of organic juices is likely to increase too.
- Opportunities for exporters from developing countries are also seen in addedvalue segments such as not-from-concentrate (NFC) juices, organic, Fairtrade and juices with reduced fruit acid.
- Specific opportunity exist in the increasing consumption of coconut water and coconut water drinks. Coconut water has recently been categorised as a type of juice in the European Union. For more information, read our

study of the coconut water market in Europe.

Some factors specific to fruit juice influencing the European market include the following:

- The juice market in Europe is expected to decline because of the high sugar content in juice drinks. Fierce competition from soft drinks is also influencing the decrease in fruit juice consumption. This means that in future, fruit juices will be used more frequently as ingredients for softdrink production than now.
- It is expected that the European import of oranges and pineapples will decrease due to the adverse weather conditions as well as the El Niño effects in Florida, Brazil, Indonesia and Thailand. These extreme weather conditions and a weak euro have pushed up the price of some fruit juice concentrates by as much as 400%. This can provide opportunities for new suppliers from developing countries willing to enter the market at a medium price. However, this is possible only after careful planning and reorganisation of the fruit production sector in specific countries, as increasing the fruit production is a long process that takes several years.
- The consumption in minor segments such as apricot, Alphonso mango, pineapple, banana and passion fruit is expected to increase.
- The consumption of superfruit is likely to increase. This will positively influence the consumption of frozen berries too, which are used as ingredients for berry types of fruit juices. The increased consumption of berry drinks does not necessarily mean an increase in imports of berry juices, as berry juices may be prepared from frozen ingredients at home using blenders and juicers.
- Sourcing lemon juices from countries outside Europe is expected to increase. In the last season, the two main European producers of lemon juices (Italy and Spain) had a very poor harvest. The European shortage of lemon juices will also lead to a rise in prices.
- The package itself is going to be hugely important, especially in presenting the content of the product, because consumers now read labels more than ever before.

### Tips:

- With respect to fruit juices, an extensive study of European market trends is available. See our study of [Trends for processed fruit and vegetables](#).
- One of the opportunities can be found in new product solutions, in which fruit juices will be used as ingredients.
- Use the opportunity to sell organic, Fairtrade and NFC juices.
- To find out more about product- and country-specific trends in the sector, read our studies of [Superfruit juices in Europe](#) and [Pineapple juice in Europe](#).

## 4. What requirements must fruit juices comply with to be allowed on the European market?

General information on buyer requirements for processed fruit and vegetables is given in our study of [Buyer requirements on the European market for processed fruit and vegetables](#). The section below deals with specific requirements applying to fruit juices in Europe.

### Legal requirements

#### Fruit juice quality requirements

The composition and quality of fruit juices are covered by a specific [European Fruit Juice Directive](#). This directive stipulates the specific characteristics of fruit juices and fruit-based drinks in order to guarantee that the best possible products are put on the European market. It defines the composition of various products that can be produced, including not only fruit juices but also dehydrated fruit juice and fruit nectars.

The directive also specifies the criteria with which various products must comply:

- which fruits can be used;
- what the minimum content of the fruits is;
- what ingredients can or cannot be added;
- how these products must be designated on the label.

As an example, if a product has been sweetened or has been obtained from concentrated juice, this must be clearly indicated on the label.

The most common issues regarding illegal additions of non-permitted substances into fruit juices which European importers are facing are the addition of C4 sugar, non-declared fruit and water to NFC juices.

## Border control

In case of repeated non-compliance of specific products originating from particular countries, stricter conditions may apply. These stricter conditions in practice mean obligatory laboratory checks for the defined number of imported containers or trucks. Products from countries that have shown repeated non-compliance are put on a list included in the Annex to the [Regulation for an increased level of official controls on imports](#).

At the moment (October 2018), there is no increased control on imported fruit juices.

## Food safety

In June 2015, the Codex Alimentarius Committee on Contaminants in Food adopted a standard to reduce the maximum level of lead in fruit juices and nectars. The maximum level of lead was changed from 0.05 mg/kg to 0.03 mg/kg. The maximum level of lead for fruit juices and nectars from berries and other small fruit is retained at 0.05 mg/kg.

The European Union has set [maximum residue levels](#) (MRLs) for pesticides in and on food products. MRLs apply to 315 fresh products and to the same products after processing, including fruit juices, adjusted to take account of dilution or concentration during the process.

In January 2016, the European Union announced four changes in regulations concerning maximum residue levels in fruit and vegetables. The specific increase of the maximum residue levels is set for [chlorpyrifos](#), [fosetyl](#) and [several other pesticides](#). Therefore, fruit juice producers from developing countries should integrate those changes in their supply chain and cooperate with fruit producers through integrated pest management practices.

In addition to general certification schemes for food safety, retail companies require sector-specific certifications and voluntary schemes for food certification. In the fruit juice industry, the most recent development is [SGF certification](#). SGF certifies fruit-processing companies, packers and bottlers, traders and brokers for fruit juices as well as transport companies and cold stores in almost 60 countries worldwide. SGF certification has a particular focus on authenticity and safety checking for conformity and food fraud by analyses and traceability checks. Already more than 80% of imported fruit juice products in Europe are coming from production sites with SGF certification.

## Labelling requirements

Allergen labelling (where allergens have to be highlighted in the list of ingredients) as well as requirements applicable to non-prepacked foods including those sold in restaurants and cafés are important. A relevant allergen in the beverages industry is sulphur dioxide, which is used in the production of soft drinks. The maximum allowed level of sulphur dioxide and sulphites is 10 mg/kg in terms of the total SO<sub>2</sub>.

## Packaging requirements

Packaging used for fruit juices must:



- protect the organoleptic and quality characteristics of the product;
- protect the product from bacteriological and other contamination (including contamination from the packaging material itself);
- protect the product from moisture loss, dehydration and, where appropriate, leakage as far as technologically practicable;
- not pass on any odour, taste, colour or other foreign characteristics to the product.

## Common and niche requirements

- Food safety certification is a common request from importers in the European Union. The most common certification schemes accepted on the European market are [IFS](#), [FSSC 22000](#) and [BRC](#).
- Environmental protection, organic and Fairtrade certification schemes are becoming more and more popular in the European Union. For organic production, you can consider [IFOAM standards](#). The European Union regulates organic food and drinks produced and/or processed within Europe as well as organic goods from elsewhere (Commission Regulation (EC) No 1235/2008, with [detailed rules concerning imports of organic products from third countries](#)).

Organic products can readily be imported from non-European countries whose rules on organic production and control are equivalent to Europe's. However, this is not the case for most developing countries, with the exception of Argentina, Costa Rica and Tunisia.

For all other non-European countries, importers can [have their organic products certified for import into the European Union](#) by independent private control bodies approved by the European Commission.

### Tips:

- Specifically for fruit juices, consult the EU Trade Helpdesk, where you can find [European Union legislation](#) on your selected products under the corresponding 2009 codes.
- For information on commonly requested standards, check the International Trade Centre's [Sustainability Map](#), an online tool which provides comprehensive information on over 210 voluntary sustainability standards and other similar initiatives covering issues such as food.
- Refer to the [Codex Alimentarius](#) for the General Standard for Fruit Juices and Nectars. Codex Alimentarius standards are in line with current practices in Europe.
- Refer to the [Code of Practice](#) of the European Fruit Juice Association for guidelines specifying Good Manufacturing Practices in the production of fruit juices and nectars.
- Stick to the rules! New laboratory testing methods can easily discover the addition of non-permitted sugars, water or other fruit to fruit juices. It takes a long time and a lot of money to build a good reputation on European markets, but this can be lost very quickly if you are caught with adulterated or sub-standard products.
- To find out the maximum residue levels (MRL) that are relevant for fruit juices, you can use the EU [MRL database](#), in which all harmonised MRLs can be found.
- Get food safety certification. However, check with the importers and experts whether the food safety certification company that you consult is appreciated by European Union buyers. Some examples of independent, internationally accredited certification companies are [SGS](#), [CIS](#), [TÜV](#) and [Bureau Veritas](#).
- Check the Codex Alimentarius' [Code of Practice for the Prevention and Reduction of Lead Contamination in Foods](#) to meet stricter requirements for the maximum level of lead in fruit juices and nectars.

## 5. What competition do I face on the European fruit juice market?

For more information about competition on the European market for fruit juice market, see our study of [Competition](#).

## 6. Through which channels can you get fruit juices on the European market?

The specialised processor (bottling company) is the preferred channel for market entry in this sector. Many importers also conduct trading and wholesale activities.

Chart 1: European channels for fruit juices

Source: Market researcher insights from industry sources

The majority of imported fruit juices in Europe are used by the beverage industry in three main different ways:

- with reconstitution of water for the bottling and production of 100% fruit juice;
- as ingredients for the production of fruit nectars and fruit drinks;
- for the bottling of not-from-concentrate fruit juices.

In the beverage market channel, the share of private-label brands is expected to increase, especially in the sub-segment of high-quality 100% fruit juices and not-from-concentrate private-label juices. This means potentially lowering the prices of branded products in order to be more competitive with lower-priced private-label juices and beverages.

Specifically for juices, new channels such as juice bars, fresh juice stores, raw food restaurants and juice corners are increasing in market share. Those channels are in line with the general healthy living trend.

A smaller portion of imported concentrated fruit juices are used by the fruit preparations industry. Here, the juices are used as ingredients in the production of marmalades, jellies, candies, cereal-based products, ice creams and fruit yogurts.

### Tips:

- Use the opportunity to sell organic, Fairtrade and NFC juices, especially to the suppliers of new market channels such as juice bars.
- To get practical advice related to business issues, read our tips for [Doing business](#) and [Finding buyers](#) on the European market for processed fruit and vegetables.

## 7. What are the end-market prices fruit juices on the European market?

Indications of margins according to the final retail prices for fruit juices are not very precise, as the whole sector contains many different products. The prices are also different between producing countries regarding the type of juice, fruit variety and quality of products. Therefore, it is only possible to give a very rough general overview of the price development.

Very roughly, it can be estimated that the Cost, Insurance and Freight (CIF) price of concentrated fruit juice represents around 0.25% to 0.50% of the retail price for the retail pack of fruit juices made from concentrates. The best option to monitor prices is to compare your offer with the offer from the largest competitors.

A very rough breakdown of the prices is shown in the illustration below.

Table 1: Price breakdown for fruit juice

Steps in export process	Type of price	Average share of the retail price
Production of fruit	Raw material price (farmers' price)	5-10% (price of the fresh fruit required for the production of one kg of concentrated juice)
Handling, processing and selling bulk product	FOB or FCA price of concentrated juice	20-30%
Shipment	CIF price	35-50%
Import, handling and processing	Wholesale price (value added tax included)	60%
Retail packing, handling and selling	Retail price (for average packaging of 250g)	100%


Please note that the share of the retail price paid to farmers varies a lot between producing countries and the type of the product. Different amounts of fruit are needed for the production of the same quantity of fruit juice, depending of the type and variety of fruit.

**Tip:**


- In the production of fruit juices, the raw material (concentrated fruit juice) accounts for more than half of the cost price. Increased prices have an immediate effect on prices paid by consumers who are, in turn, price-conscious. So monitor your production costs in order to avoid losing customers.

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