

Jamnica

Market

The consumption of bottled water is growing worldwide and so is the awareness of the strategic importance of water as a product. Europe is the largest consumer on the global market and Croatia with its rich springs and quality of water has a chance to position itself as an important player on the market in this category.

The water market in Croatia is also very dynamic. The annual consumption according to official sources is around 334 million litres, of which 200 million litres of carbonated mineral water and 133 million litres of non-carbonated spring water. Water consumption in Croatia is around 75 litres per capita, which is still two to three times less than the European average.

Jamnica d.d. is the largest Croatian producer of mineral and spring water as well as non-alcoholic beverages, with a tradition going back to 1828. Since 1993, as part of the Agrokor concern, with strategic investment into modernisation and technological development, Jamnica has grown into one of the most modern bottling plants of mineral water, spring water and non-alcoholic beverages in Europe. The total annual production is 361 million litres, which makes it the largest producer of its kind in South-East Europe.

The carbonated natural mineral water Jamnica is the oldest brand of the company Jamnica and one of the oldest authentic Croatian products overall, with a market share of 83 percent, while the natural spring water Jana has taken the leading position on the market of spring waters with a share of almost 50 percent, in just a few years.

Apart from investing into the development of new technologies and expanding its distribution system and sales channels, Jamnica primarily basis its development on building strong brands that have leading positions on the Croatian market, while their role on regional markets as well as globally is also becoming increasingly important. Jana is thus growing stronger and establishes itself on the demanding European and world markets, assuming the role of a recognisable Croatian export product.

Thanks to its supreme quality and unique taste as well as continuous investment in marketing strategies and design, Jana is accomplishing success in the countries of the region: Bosnia and Herzegovina, Serbia, Montenegro, Slovenia, Hungary as well as on international markets like USA, Japan and Portugal.

A new export market is entered every year, so starting with 2008 Jana is present at the Romanian market, as well as one of the strongest and most demanding developing world markets, that in Russia.



Since 2009 Jana and Jamnica are also available on store shelves in the Baltic countries: Lithuania, Latvia and Estonia.

On regional markets, Jana's largest competition are the large local companies. However, on the European and international markets, Jana competes with premium water brands most often owned by the "big four": Nestle, Coca-Cola, PepsiCo and Danone.

Jana is positioned as a first class product of unique taste and recognisable identity with clear and consistent communication, which differentiates it from the competition.

At both domestic and international markets, Jana is equally positioned as a premium product in the segment of non-carbonated waters, which implies equal communications strategy and unique price positioning. The specifics of a market are taken into consideration, of course, therefore the communication and sales activities are adapted accordingly. However, generally speaking Jana is an established regional brand with open aspirations to become an international brand with a unique and recognisable communication strategy.

Achievements

Many awards and international acknowledgements confirm the quality of Jamnica and Jana as a world-renowned product.

In 1997 Jamnica became one of the first products awarded the label of Croatian Quality.

In 2003, at the international water fair Aqua Expo in Paris, Jamnica won the prestigious EAUISCAR award as the best natural carbonated mineral water; Jana was the proud award recipient as the best spring water in 2005 and the flavoured Jana with strawberry-guava flavour received the EAUISCAR award in 2004.

In 2007, Jamnica received the CroPak 2007 for quality and design of the new reusable packaging.

In 2007 Jamnica was awarded the Trusted Brand title as the best Croatian water through consumer evaluation, while Jana won the same award in 2008.

EU recognition - Jamnica and Jana are the only Croatian bottled waters that are acknowledged and registered on the official EU list of bottled waters.

NSF, the leading independent American institute for quality control guarantees the quality of Jana and the safety of the bottling process.

In 2006 the international Taste & Quality Institute awarded Jana with the highest mark for taste and quality (3 stars).

The SGS Fresenius Institute awarded Jana the prestigious international SGS Fresenius certificate, acknowledging its impeccable purity. Due to its balanced content and verified purity doctors from the leading European quality control institute recommend Jana as suitable for preparation of baby food as part of children's nutrition.

Jana is also registered at the official list of NATO suppliers, something that requires exceptional water quality certified by continuous analyses carried out several times a year.

Jana SL, a unique five-litre packaging in the region with a practical bottle design and special cap won the 2009 CroPak award in the prototype category.

History

The ancient Celts left the first written record of unique cold water that springs enriched with refreshing bubbles. The empress Maria Teresa added Jamnica to her register of mineral waters for the Vienna court in 1772. Apart from the fact that Jamnica was her own favourite refreshment at the Vienna court, Maria Teresa presented and introduced Jamnica into the modern European society of the time. The first bottles of Jamnica intended for sale were bottled 180 years ago, back in 1828. At the time, Jamnica was mostly distributed through pharmacies where it was recommended for prevention of various chronic illnesses.

The much younger brand, Jana was created and introduced to the market during 2002 and in almost seven years it grew into one of the most recognised Croatian brands at the domestic and international markets. In early 2001 Jamnica d.d. carried out a Greenfield investment, after which it opened and launched the St. Jana bottling plant. Commercial production of Jana started in the summer of 2002.

Product

Jamnica is a carbonated natural mineral water that springs up from 500 meters deep earth deposits, enriched with minerals. It is drawn up in Jamnica Kselica, protected from any form of pollution and external influences. Jamnica is distinguished for its unique taste, balanced mineral content and natural carbonation. Jamnica is particularly favoured in gastronomy and catering. It is refreshing and





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thirst-quenching, it blends excellently with juices and other beverages, and it also has a healing effect on human health.

Jana, natural spring water, was a well kept secret for 7000 years, hidden in an 800 metres deep artesian well near St. Jana. Its taste of freshness and lightness is a result of a truly natural and gradual process of filtering. The water is protected with layers of mineral rock and there are absolutely no barriers between Jana and nature.

With a low content of sodium and well balanced content of elements, especially the ratio of calcium and magnesium, Jana is ideal for replenishing fluids, so important for the human body.

Recent Developments

Due to continuous market research, in an effort to satisfy the ever-growing demands of modern consumers, in 2004 Jana expanded its product range to include non-carbonated non-alcoholic refreshing beverages, bottled on the basis of Jana spring water and natural fruit flavours. Flavoured Jana has a low calorie content, it is declared as a light product and it offers refreshment to consumers with four fruity combinations: lemon-lime, strawberry-guava, blueberry-cranberry and apple-lychee.

Always keeping pace with the latest technological advancements, in 2008 Jamnica d.o.o. was the first in this part of Europe to introduce on its 0.5l packaging of flavoured Jana a new sport "thumb-up" cap that facilitates the opening and product consumption. The cap satisfies the most rigorous safety standards and offers complete protection of product quality, bottled with the state-of-the-art aseptic technology.

In 2005 the company started redesigning the Jamnica brand, involving new packaging and label. The process was completed in 2007 by introducing a new reusable 1 l bottle with a twist-off cap, in a new unfoldable carrier.

In line with market research, in August 2008 the Jamnica brand introduced to the market the flavoured carbonated mineral

water - Jamnica Sensation.

It comes in two refreshing combinations of flavours: lime-kiwano and tangerine-mapo, and it is classified under the category of light products.

In accordance with market demands, in August 2008 the Jamnica brand launched a new isotonic non-carbonated non-alcoholic beverage Jamnica Pro Sport, with a lemon-grape flavour and addition of vitamins and minerals, intended for professional athletes, recreational sport-lovers and everyone exposed to intensified physical stress. The specific feature of Jamnica Pro Sport isotonic is the special sugar content with low glycemic index, i.e. Palatinose. Jamnica Pro Sport is available in 0.75 l PET packaging with a sport cap, and it is a practical and powerful beverage for replenishing lost body fluids and nutrients necessary during intensive physical activity.

Since 2008 Jamnica Pro Sport has been the official isotonic drink of the Croatian Olympic National Team.

In the summer of 2009, after many years of investments into development and design, Jana presented to the market a unique packaging, a 5 litres bottle, the main advantage of which is its very practical design and functional cap. Jana 5L is characterised by simplicity of use. Specifically, the option of placing the bottle horizontally facilitates the flow of water, it takes up very little space in the refrigerator, and it has a special pusher ensuring an easy way of pouring water directly into the glass.

Promotion

Integrated marketing communication represents the strength of the brands Jamnica and Jana on the domestic, regional and international markets.

In October 2008, more specifically on 18 October 2008, Jamnica celebrated its 180th birthday. The jubilee was marked with an innovative and original marketing campaign, broadcasting TV spots and print advertisements from the long history of Jamnica, dating back to the beginning of the 20th century.

As the leader in the category of carbonated mineral waters with a market share of 83 percent, Jamnica affects the development of the entire category of carbonated mineral waters.

In 2009 Jamnica launched a new communication strategy, by linking its product to the gastronomic segment. The campaign itself offers to consumers very clear and justified reasons to consume Jamnica with food. Jamnica is a natural mineral water that facilitates food digestion due to its composition, so it has a beneficial effect on the digestive system. Rich with minerals, it increases the nutritional value of each meal and represents light refreshment, without additional calories.

In 2009, the Jana brand launched an educational campaign about the importance of drinking water and its effect on the human body. The campaign highlights

the values of Jana, arising from its fully protected source and origin as well as the value and importance of consumption of water in everyday life.

Advertising on television, in the print media, outdoor, on radio and Internet together comprise a comprehensive marketing communication of brands that are additionally supported at points of sale with carefully chosen display materials.

Apart from advertising in various media and at points of sale, Jamnica and Jana brands also contribute to and take part in fashion, cultural and sport events, as well as those organised for children. In this way, Jamnica and Jana actively participate in the advancement of the Croatian society.

It should be noted that Jana is not associated with fashionable and glamorous events only in Croatia and the region. Jana is the Official Water of the Madison Square Garden arena in New York, where it confirms its international status as a premium brand in the hands of world celebrities.

Brand Values

Unique taste, certified quality and an authentic Croatian product with long tradition are the values of Jamnica brand.

Purity and natural quality, premium design, internationality as well as safety with and self-confidence are the strengths of Jana brand.

www.jamnica.com.hr

www.jana.com.hr



THINGS YOU DIDN'T KNOW ABOUT...

Jamnica / Jana

- In 1772, thanks to the empress Maria Teresa the first chemical analysis was done on Jamnica, after which it was enlisted on the register of mineral waters of the Vienna Court.
- The first bottles of Jamnica were filled in 1828.
- Jana was created before everything we know today at a time when nature was free of any kind of pollution, 7000 years ago. Jana's first encounter with today's world takes place at the moment of opening the bottle.
- Jana is fully protected from pollution that threatens shallow waters, and due to the exceptional depth from which it is extracted, beneath ancient dolomite rocks, it has an ideal ratio of calcium and magnesium.

