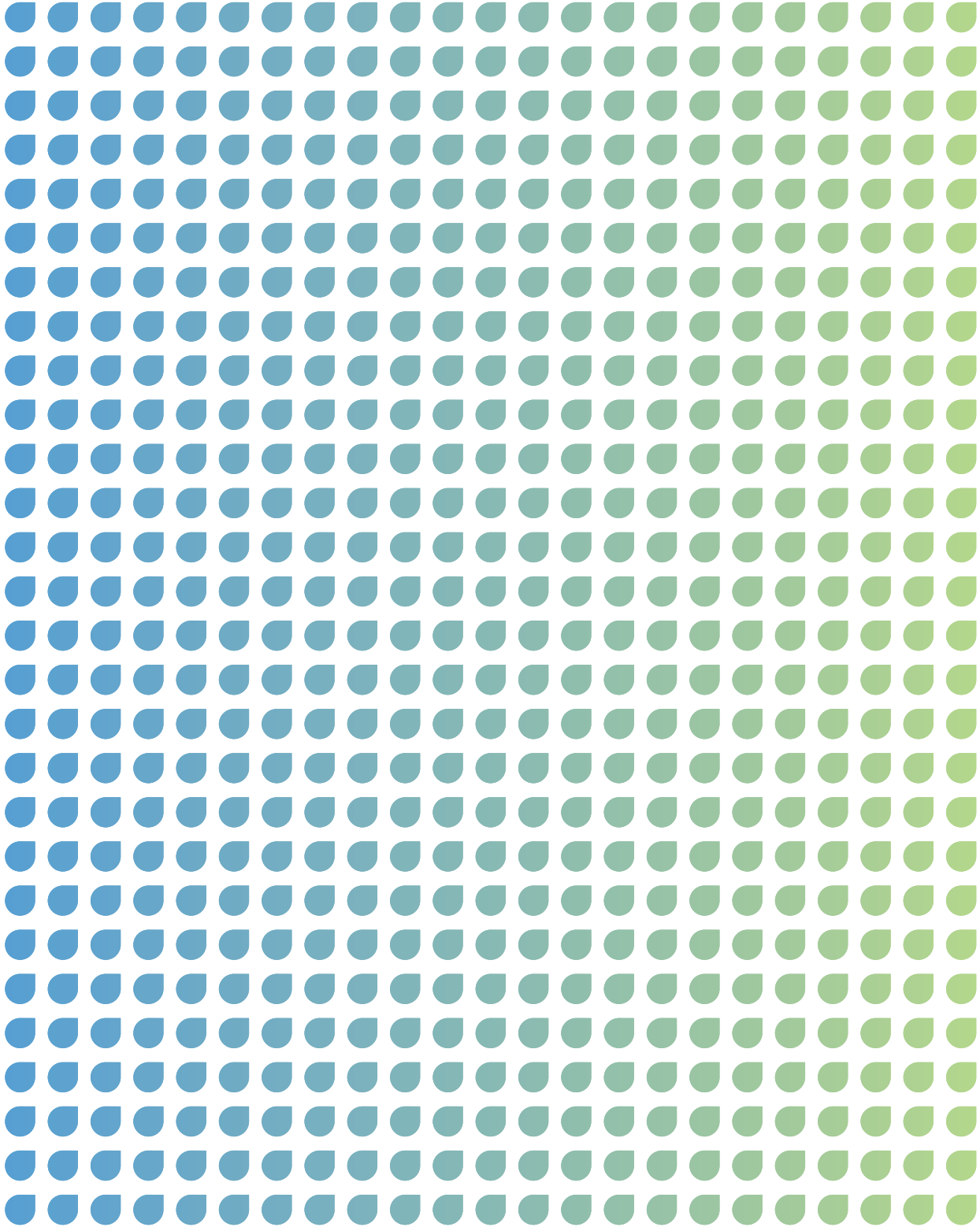


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Liquid Intelligence

We live in a world where information is currency. Every business decision demands concrete facts and numbers. The reliability of information, and how it is put to use, makes all the difference between success and failure.

Canadean is the beverage industry information specialist. Everything we do is underpinned by class-leading data, but what sets us apart is our philosophy. We believe that we are in the business of facilitating decision making. This means that everything we deliver to our clients is actionable, accessible and versatile enough to be used across the whole of their organisations.

Our client list, built on partnership and trust, is testament to our reputation as the benchmark for global beverage market intelligence.

## Client List

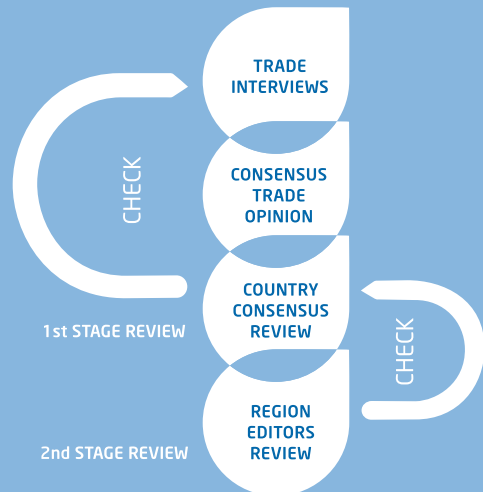
- Alcan
- Ajinomoto
- Amcor
- Bacardi
- Bain & Company
- Ball
- Beverage Partners Worldwide
- Britvic
- Budvar
- Carlsberg
- Casa Cuervo
- Cedevita
- Cerveceria
- Citrosuco
- CitroVita
- Coca-Cola Enterprises
- Cott
- Crown Bevcan
- Danone
- Deutsche Bank
- Diageo
- Diblo Corporativo
- Döhler
- Dr Pepper Snapple Group
- Droga Kolinska
- Efes
- Elopak
- Emhart Glass
- Ernst & Young
- European Drinks
- FEMSA
- Gerolsteiner
- Grupo Modelo
- Heineken
- Karlovarske
- Lanxess
- Mahou San Miguel
- McKinsey
- Merrill Lynch
- Molson Coors
- Morgan Stanley
- Nestlé
- Orangina Schweppes
- Pago
- PepsiCo
- Rabobank
- Red Bull
- Rexam
- SABMiller
- San Miguel Corporation
- SIG
- Spadel
- Symrise
- Tetra Pak
- Thai Beverages
- The Coca-Cola Company
- Unilever
- Wild
- WimBillDan

## Research Methodology

The cornerstone of our business is our unique methodology of research. In-depth interviews with both manufacturers and their suppliers are conducted locally to deliver a total market picture encompassing both on and off-trade consumption.

The information gathered is reconciled and cross-checked by a network of more than 60 local consultants and specialist researchers, each with comprehensive industry experience and knowledge. Complementary to retail audit data, this model provides an in-depth analysis of the international beverage market spanning over 80 countries worldwide.

Canadean's cross-check methodology of research



## Canadean Wisdom

To deliver our market leading research in the most user-friendly way, we have developed Canadean Wisdom, a multi-dimensional database that allows the subscriber to access the data in a format most suited to their needs.

Accessible online at [www.canadean.com](http://www.canadean.com), Canadean Wisdom is designed to help beverage industry professionals make better decisions. The database is available across the following beverage services:

- Annual reports: Soft Drinks, Beverage Packaging, Beer
- Quarterly reports: All Commercial Beverages
- Global reports: Soft Drinks, Beer, Beverage Packaging, All Commercial Beverages



## Canadean Interactive

Our latest innovation in product delivery for clients. This service allows clients to access their reports online and offers useful additional features including:

- 'Searchability' across the full text of all reports subscribed to
- Presentation ready tables and graphics - just select and drag into your own documents
- 'Cut your own report' - create your own bespoke reports by selecting only sections relevant to your project
- Nine language translation tool - view any report side-by-side with an online generated translation



## Annual and Quarterly Reports

### Soft Drinks

Annual country research covering 12 soft drinks categories across 56 markets and representing circa 83% of global consumption. These categories include packaged water, bulk water, carbonated soft drinks, juice and nectars, still drinks, squash/syrups, fruit powders, iced/ready-to-drink (RTD) tea drinks, iced/RTD coffee, sports and energy drinks.

This annual country research is Canadean's most in-depth service with analysis which focuses on volume by segment, flavour, brand, brand owner, distribution channel and packaging types and sizes as well as value (local currency, US dollars or Euros) by category.

### Beverage Packaging

Annual country research of beverage consumption data by category, pack type, pack material and individual pack size for selected countries worldwide.

### Beer

Annual country research covering domestic and imported brand volumes, market segmentation data, brewers' domestic sales volumes, enhanced retail pricing data, market valuation, distribution and packaging data across 59 markets.

### All Commercial Beverages

Our Quarterly Beverage Tracker is available for West and East European markets, plus selected major markets worldwide. This service offers a complete overview of beverage consumption trends and latest market developments. Last quarter, year to date, moving annual totals and current year forecasts are included. Tracking all 12 soft drinks categories, hot tea and coffee, beer, cider, wines, spirits and five dairy drinks categories, the Quarterly Beverage Tracker is ideal for benchmarking total market vs retail audit data and an essential tool for keeping up-to-date with latest industry and market developments throughout the year.



## Global Reports

Canadean has developed a number of global databases and reports in response to increasing cross-border expansion and demand for consumption trends within the beverage industry. Researched in over 80 markets and representing circa 95% of global consumption, these reports allow our clients to:

- Recognise potential growth areas for business development
- Analyse regional or global developments for strategic planning at all levels
- Monitor the development of commercial beverages and packaging over time by category, country and region to determine share of throat
- Better understand the global marketplace and how different factors will affect their business in the future

### Global Soft Drinks

Global category studies are available for packaged water, bulk water, carbonates, juice and nectars, still drinks, dilutables, iced/RTD tea, iced/RTD coffee, sports and energy drinks.

### Global Beer

**Global Beer Trends** provides comprehensive consumption data across nearly 200 markets, featuring easy-to-use comparative data tables and top-line analysis.

**Global Brewer Analyser** provides a complete volume analysis of the domestic and international activities of the world's leading beer companies. An ideal tool for comparison of leading players' strengths and weaknesses.

### Global Packaging

Covers data for domestic consumption of soft drinks by category and beer detailed by pack type, pack material and individual pack size in both million litres and units.

### Global Beverage Forecasts

Tracks consumption patterns and category trends of bottled water, carbonates, juice, nectars, still drinks, squash/syrups, fruit powders, iced/RTD tea, iced/RTD coffee, sports drinks, energy drinks, bulk/HOD water, dairy drinks, hot coffee and hot tea, beer, cider, wine, spirits, flavoured alcoholic beverages, fortified wine, sake and rice wine. Updated twice a year with forecasts for all beverage consumption five years ahead. Ideal for strategic and forward planning.



## Canadean Consulting

Canadean also provides beverage-specific consultancy support on commercial, strategic, project management and marketing issues. Using proprietary models such as Profit Pot™, Canadean Consulting has developed a framework for segmenting and analysing the market in terms of value to identify where profitable opportunities lie. Along with consumption occasion analysis and route to market mapping, we can develop a picture of the value chain that highlights the value and gross margin potential of each identified opportunity.

Recent and current assignments across Asia, Europe, the Americas and globally include:

- Value chain analysis
- Review and realignment of corporate strategy
- Review of competitors and key market drivers
- Opportunity mapping of volume and value
- Investigation and ranking of market/segment attractiveness
- Identification and assessment of potential acquisition targets (screening and ranking)
- Acquisition and due diligence
- Divestment of brands
- New product development
- Route-to-market/distributor strategy and selection
- Future packaging trends: opportunities for key pack formats in selected categories
- Multivariate forecasting
- Client workshops

With complete access to the Canadean Wisdom database, Canadean Consulting analyses and converts the data into actionable results.



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## Expertise Beyond the Numbers

Canadean offers a range of additional services for professionals who wish to look beyond the numbers.

These include:

- Bespoke projects
- Database management
- Long-range forecasting
- Client presentations
- Beverage workshops
- Bespoke database solutions
- Industry presentations
- Industry referrals and claims

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## Engaging the Industry

Bringing together industry leaders and experts, Canadean also holds regular beverage conferences which focus on the strategic issues that matter within the beverage world.

“Canadean captures, analyses and delivers brand specific information to the global beverage industry. Since the company was formed in 1973 we have maintained a beverage focus giving us an understanding of the market that is second to none.”

Kelsey van Musschenbroek  
Chairman and CEO





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## Contact Information

### Canadean Head Office

Canadean Limited  
12 Faraday Court  
Rankine Road  
Daneshill  
Basingstoke  
Hants  
RG24 8PF  
United Kingdom

T +44 1256 394200  
F +44 1256 394201

Client Services  
T +44 1256 394224  
sales@canadean.com  
www.canadean.com

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### Canadean Regional Offices and Affiliates

Canadean Iberia  
**Madrid**  
T +34 91 859 4886  
iberia@canadean.com

Canadean Latin America  
**Argentina**  
T +54 11 4314 1043  
latam@canadean.com

Canadean Latin America  
**Mexico**  
T +52 55 1105 0555  
latam@canadean.com

Canadean China  
**Beijing**  
T +86 10 6581 1794  
asiapac@canadean.com

Canadean China  
**Shanghai**  
T +86 21 5157 2275  
asiapac@canadean.com

Canadean China  
**Hong Kong**  
T +852 2690 5200  
asiapac@canadean.com

[www.canadean.com](http://www.canadean.com)