



BEVERAGE FORECASTS



Global Beverage Forecasts

201F Cycle

East Europe

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Soft Drinks Service - annual country and global Wisdom databases and reports
Beer Service - annual country and global Wisdom databases and reports
Beverage Packaging Service - annual country and global Wisdom databases and reports
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For more information on any of Canadean's beverage services or consulting please contact Canadean on tel: +44 (0)1256 394200, email: sales@canadean.com or visit www.canadean.com





East Europe

Contents & Notes

Please note that these forecasts were produced in GYDhA VYf 201%and supersede all previous forecasts. They may differ from forecasts previously published in our Soft Drinks and Beer Market Insights reports and Quarterly Beverage Tracker (QBT).

Data Horizon: FJJJEFC(Ō WOSĀ ā ĀEFFEĪ ŌĀ |^&æ D

Measures: Volume (million litres), Population (millions), Litres Per Capita

Geographic Coverage

EAST EUROPE: Belarus, Bosnia-Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Macedonia, Poland, Romania, Russia, Serbia, Slovak Republic, Slovenia, Turkey, Ukraine, Other East Europe

Regional Balancers

For regions where it has not been possible to generate total market volumes by profiling each individual country, we have taken a value judgement to arrive at a balancing "Others" figure. This is recorded as a separate entity, specific to the Region to which it belongs

Product Coverage

Main beverage category groups: Soft (standard), Soft (extended), Beer, Spirits (standard), Spirits (extended) and Wines.

Individual beverage categories within each main group are as follows:

Soft (standard): Packaged Water, Carbonates, Juice (100% pure juice), Nectars (products with a 25-99% juice content), Still Drinks (<25% juice content), Squash/Syrups, Fruit Powders, Iced/Ready To Drink (RTD) Tea, Iced/Ready To Drink (RTD) Coffee, Sports Drinks, Energy Drinks. Packaged Water excludes all water sold in large containers of >10 litres

Soft (extended): Bulk/HOD Water, Dairy Drinks (White Milk, Flavoured Milk, Soymilk and Cultured Dairy Drinks including Drinking Yogurt and Fermented Milk combined), Hot Coffee, Hot Tea

Beer: Beer, Sorghum Beer and Cider

Spirits (standard): Spirits (excludes Fortified Wine and Flavoured Alcoholic Beverages (FABs))

Spirits (extended): Flavoured Alcoholic Beverages (FABs), Fortified Wine, Rice Wine and Sake

Wines: Wine (Still and Sparkling combined)

Market Commentary

East Europe

Packaged Water

Bulk/HOD Water

Carbonates

Juice

Nectars

Still Drinks

Squash/Syrups

Fruit Powders

Iced/Rtd Tea Drinks

Iced/Rtd Coffee Drinks

Sports Drinks

Energy Drinks

Dairy Drinks

Hot Tea

Hot Coffee

Beer

Cider

Wine

Spirits

Fortified Wine

FABs

Global Beverage Forecasts - Methodology



MARKET COMMENTARY

BELARUS

Packaged Water

Bulk/HOD Water

Carbonates

Juice

Nectars



Still Drinks

Squash/Syrups

Fruit Powders

Iced/Rtd Tea Drinks

Iced/Rtd Coffee Drinks



Sports Drinks

Energy Drinks

Dairy Drinks

Hot Tea



Hot Coffee

Beer

Cider

Wine

Spirits

Fortified Wine



FABs



Global Beverage Forecasts - Methodology

1. The first stage in creating the forecasts is gathering input from trade interviews undertaken by the Canadean beverage researchers in each local market. This is designed to provide a medium term (1 to 2 year) view of expected volumes from leading manufacturers by main beverage category. 82 markets are researched biannually. In 42 of these, additional quarterly research takes place. As well as providing an ongoing check on volumes the quarterly research also tracks industry confidence levels.
2. Inputs from local Canadean researchers are combined with an analysis of back data to create a longer range momentum forecast, weighted to the most recent period.
3. Our analysts then validate this forecast in a number of ways:
 - a. Ensuring forecasts are within the recent range of market/category change
 - b. Volume forecasts are aligned with forecast changes in GDP
 - c. Forecasts fit with data on industry confidence levels
4. Finally, we have made specific allowance for the effects of the recent global economic downturn, using an analysis of previous economic dips and their effect on beverage consumption.