



# Global Beverage Forecasts

## 2010 Cycle

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<b>All Beverage Services</b> - annual and quarterly Wisdom databases and reports - Global Beverage Forecasts and Quarterly Beverage Tracker (QBT)
<b>Soft Drinks Service</b> - annual country and global Wisdom databases and reports
<b>Beer Service</b> - annual country and global Wisdom databases and reports
<b>Beverage Packaging Service</b> - annual country and global Wisdom databases and reports
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### Data Table

**Data Horizon:** 1999-2008 ACTUAL, 2009P (provisional), 2010-2015F (forecast)

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

#### Geographic Coverage

**ASIA:** China, Hong Kong, India, Indonesia, Japan, Kazakhstan, Malaysia, Pakistan, Philippines, Singapore, South Korea, Taiwan, Thailand, Vietnam, Other Asia

**AUSTRALASIA:** Australia, New Zealand

**LATIN AMERICA:** Argentina, Bolivia, Brazil, Caribbean, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, Venezuela, Other Latin America

**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

**MIDDLE EAST & NORTH AFRICA (MENA):** Bahrain, Egypt, Jordan, Kuwait, Lebanon, Oman, Saudi Arabia, Qatar, Tunisia, United Arab Emirates, Other MENA

**REST OF AFRICA:** Nigeria, South Africa, Other Rest of Africa

**NORTH AMERICA:** Canada, United States of America

**WEST EUROPE:** Austria, Belgium, Denmark, Finland, France, Germany, Greece, (Republic of) Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom, Other West Europe

#### Regional Balancers

For regions where it has not been possible to generate total market volumes by profiling each individual country, specifically Central & South America, Asia, Middle East/North Africa and Rest of Africa, 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

### Geographic Coverage

**ASIA:** China, India, Indonesia, Japan, Kazakhstan, Malaysia, Philippines, Singapore, Thailand, Vietnam

**LATIN AMERICA:** Argentina, Brazil, Chile, Colombia, Mexico, Peru, Venezuela

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

**REST OF AFRICA:** Nigeria

**NORTH AMERICA:** United States of America

**WEST EUROPE:** Austria, Belgium, Denmark, Finland, France, Germany, Greece, (Republic of) Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom

### Categories covered where applicable:

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

Sake

Rice Wine

### Global Beverage Forecasts - Methodology



Data extracted from Canadean Ltd's Global Beverage Forecasts Wisdom database  
 All data is owned by Canadean Ltd and may not be passed to a third party without written consent from Canadean Ltd

Asia

Volume (Millions Litres)		1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009P	2010F	2011F	2012F	2013F	2014F	2015F
<b>All Categories</b>	<b>Total</b>																	
<b>All Soft</b>	<b>Total</b>																	
Soft (Standard)	Total Packaged Water Carbonates Juice Nectars Still Drinks Squash/Syrups Fruit Powders Iced/RTD Tea Drinks Iced/RTD Coffee Drinks Sports Drinks Energy Drinks																	
Soft (Extended)	Total Bulk/HOD Water Dairy Drinks Hot Coffee Hot Tea																	
<b>All Alcoholic</b>	<b>Total</b>																	
Beer	Total Beer Sorghum Beer Cider																	
Spirits (Standard)	Total Spirits excluding FABs & Fort Wine																	
Spirits (Extended)	Total Flavoured Alcoholic Beverages Fortified Wine Sake Rice Wine																	
Wines	Total Wine																	
<b>Population (Millions)</b>																		
<b>Litres per Capita</b>																		
<b>All Categories</b>	<b>Total</b>																	
<b>All Soft</b>	<b>Total</b>																	
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Soft (Extended)	Total Bulk/HOD Water Dairy Drinks Hot Coffee Hot Tea																	
<b>All Alcoholic</b>	<b>Total</b>																	
Beer	Total Beer Cider																	
Spirits (Standard)	Total Spirits excluding FABs & Fort Wine																	
Spirits (Extended)	Total Flavoured Alcoholic Beverages Fortified Wine Sake Rice Wine																	
Wines	Total Wine																	

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China

Volume (Millions Litres)		1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009P	2010F	2011F	2012F	2013F	2014F	2015F
<b>All Categories</b>	<b>Total</b>																	
<b>All Soft</b>	<b>Total</b>																	
Soft (Standard)	Total Packaged Water Carbonates Juice Nectars Still Drinks Squash/Syrups Fruit Powders Iced/RTD Tea Drinks Iced/RTD Coffee Drinks Sports Drinks Energy Drinks																	
Soft (Extended)	Total Bulk/HOD Water Dairy Drinks Hot Coffee Hot Tea																	
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Wine	Wine																	



MARKET COMMENTARY	
<b>China</b>	
Packaged Water	
Bulk/HOD Water	
Carbonates	
Juice	
Nectars	



**MARKET COMMENTARY**

**Still Drinks**

**Squash/Syrups**

**Fruit Powders**

**Iced/Rtd Tea Drinks**

**Iced/Rtd Coffee  
Drinks**



**MARKET COMMENTARY**

**Sports Drinks**

**Energy Drinks**

**Dairy Drinks**

**Hot Tea**

**Hot Coffee**



**MARKET COMMENTARY**

**Beer**

**Cider**

**Wine**

**Spirits**

**Fortified Wine**

**FABs**



**MARKET COMMENTARY**

**Sake**

**Rice Wine**



### Global Beverage Forecasts - Methodology

1. The first stage in creating the forecasts is gathering input from trade interviews undertaken by the Canadian 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 47 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 Canadian 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.