



BEVERAGE FORECASTS



# Global Beverage Forecasts

## 2011 Cycle

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-  [GLOBAL SUMMARY](#)
-  [AFRICA](#)
-  [ASIA](#)
-  [AUSTRALASIA](#)
-  [EAST EUROPE](#)
-  [LATIN AMERICA](#)
-  [MENA](#)
-  [NORTH AMERICA](#)
-  [WEST EUROPE](#)

## Contents & Notes

*Please note these forecasts were produced in September 2011 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 Tables

**Data Horizon:** 1999-2010 ACTUAL and 2011-2016F (forecast)

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

### Geographic Coverage

**AFRICA:** Nigeria, South Africa, Other Africa

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

**AUSTRALASIA:** Australia, New Zealand, Other Australasia

**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

**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

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

**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, 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

**AFRICA:** Nigeria

**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

**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

Global Summary

		1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011F	2012F	2013F	2014F	2015F	2016F
<b>Volume (Millions Litres)</b>																			
<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>																		
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	Wine																		







MARKET COMMENTARY

CHINA

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

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 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 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.