



Global Beverage Forecasts

2010 Cycle

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| Soft Drinks Service - 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

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)





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.