



BEVERAGE FORECASTS



Global Beverage Forecasts

2010 Cycle

Rest of Africa

Canadean Contacts:

Debra Richards, Sales Support Manager: +44 (0)1256 394227

Alison Bodnar, Sales Support Administrator: +44 (0)1256 394287

Copyright

Information contained in Canadean reports is confidential and for use only by clients of Canadean with valid contracts. All copyright in these publications is reserved. No part of this report may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means (electronic, mechanical, photocopying, recording or otherwise) without prior permission of the copyright owners.

Liability

Whilst every effort has been made to ensure that information contained in this report is accurate and that opinions expressed are sound, Canadean Ltd cannot be made liable for any errors, omissions or incorrect information or for any loss or consequential losses arising as a result of decisions taken based on the contents of this report.

Visit the Canadean website @ www.canadean.com

| Products & Services Available from Canadean in 2010 |
|---|
| Wisdom - Canadean's multi-dimensional beverage database, available for all services |
| All Beverage Services - annual and quarterly Wisdom databases and reports - Global Beverage Forecasts and Quarterly Beverage Tracker (QBT) |
| 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 |
| Iberia - annual, quarterly and monthly reports on Spain and Portugal |
| Special Focus Reports - please check our website or contact us for details of the latest special reports available |
| Consulting |
| Bespoke projects |
| Database management |
| Long-range forecasting |
| Client presentations |
| Beverage workshops |
| Bespoke database solutions |
| Industry presentations |
| Industry referrals and claims |
| Conferences |

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





Contents

Data Table

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

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

Geographic Coverage

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

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, 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) and Fortified Wine

Wines: Wine (Still and Sparkling combined)

Market Commentary

Geographic Coverage

REST OF AFRICA: Nigeria,

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
Beer
Cider
Wine
Spirits
Fortified Wine
FABs

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

Rest of Africa (Global)

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

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

Nigeria

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

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

South Africa

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



| MARKET COMMENTARY | |
|-------------------|--|
| Nigeria | |
| Packaged Water | |
| Bulk/HOD Water | |
| Carbonates | |



MARKET COMMENTARY

Juice

Nectars

Still Drinks

Squash/Syrups

Fruit Powders



MARKET COMMENTARY

Iced/Rtd Tea Drinks

Sports Drinks

Energy Drinks



MARKET COMMENTARY

Dairy Drinks

Hot Tea



MARKET COMMENTARY

Hot Coffee

Beer

Wine

Spirits

Fortified Wine

FABs