



BEVERAGE FORECASTS



# Global Beverage Forecasts

2011 Cycle

West Europe

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## West Europe

### Contents & Notes

**Please note that 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 Horizon:** 1999-2010 ACTUAL and 2011-2016F(forecast)

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

#### Geographic Coverage

**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**

### **West 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

AUSTRIA

Packaged Water

Bulk/HOD Water

Carbonates

Juice

Nectars



Still Drinks

Squash/Syrups

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.