

Private Label Trends in the Global Soft Drinks Market report

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KEY PRIVATE LABEL PRODUCERS – DIRECTORY

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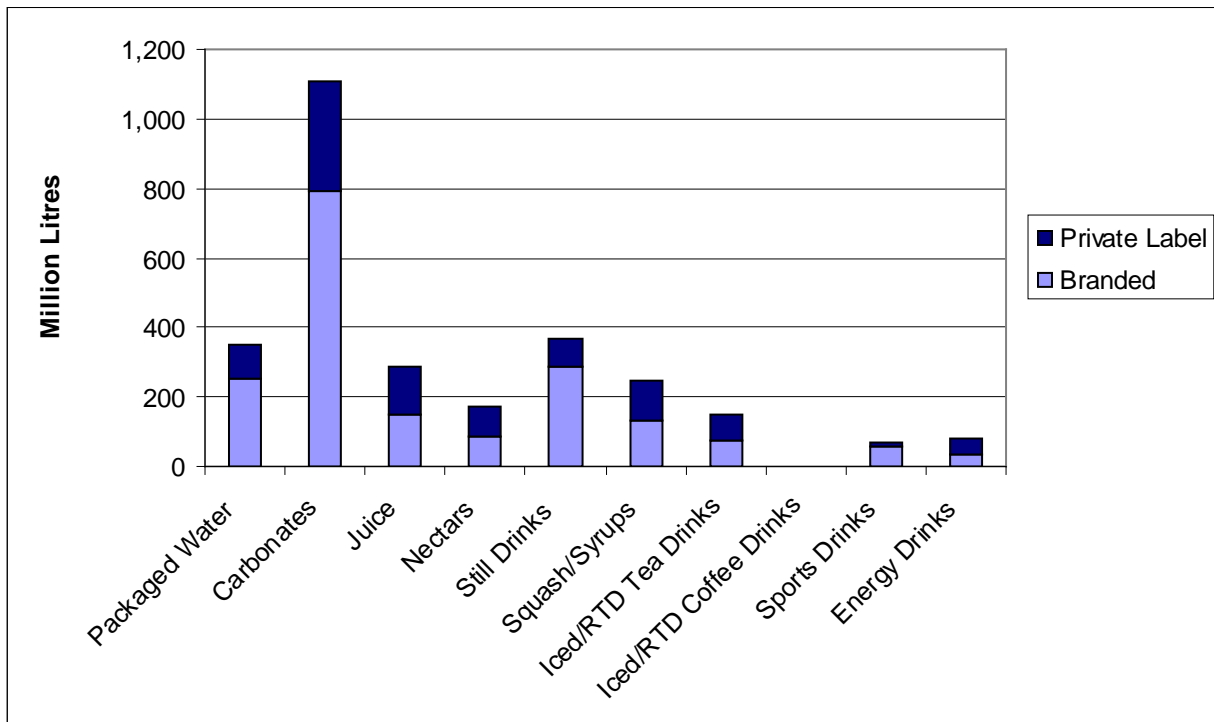
SAMPLE DATA

Table: Sample Private Label Volume By Category, 2007-2009F

Category/M Litres	Private Label			% chg		% category share		
	2007	2008	2009F	2007-08	2008-09F	2007	2008	2009F
Total	54.0	54.0	57.3	0.0	6.1	10	10	10
Packaged Water	18.6	22.3	28.2	15.3	23.3	10	10	10
Carbonates	17.9	15.8	15.6	-6.6	-3.4	10	10	10
- Cola	1.9	1.1	1.1	-42.1	0.0	10	10	10
- Others	16.0	14.7	14.5	-1.7	-4.3	10	10	10
Juice	3.6	2.7	2.4	-25.0	-11.1	10	10	10
Still Drinks	15.3	24.6	34.6	24.6	24.0	0.2	10	10
Squash/Syrups	1.4	0.2		-85.7	-100.0	1.1	0.2	
Fruit Powders	2.0	2.0	1.4	0.0	-30.0	0.5	0.5	0.4
Iced/Rtd Tea Drinks	10.0	12.1	14.4	21.0	19.0	0.2	0.2	0.2
Iced/Rtd Coffee Drinks	1.4	2.0	2.4	42.9	20.0	1.8	2.2	2.4
Sports Drinks		0.3	0.3		0.0		0.1	0.1

Source : Canadean

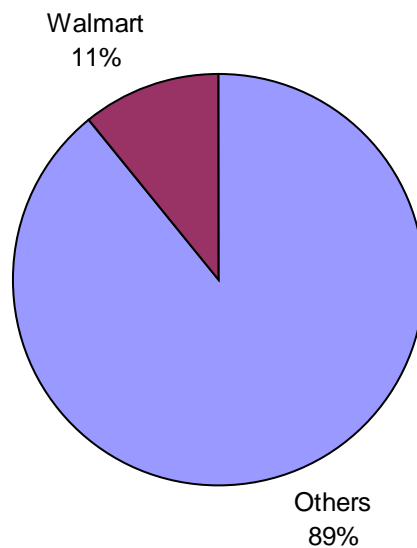
Graph: Sample Private Label vs Branded Volume By Category, 2008



Source : Canadean



Graph: Sample Key Private Label Producers, 2008



Source : Canadean

Packaged Water

Packaged water Private Label includes Wal-Mart, Lotus and some local retail groups. The products are produced locally under contract and normally priced about 10% cheaper than branded product. With this price advantage, packaged water could be the largest category for Private Label volume.

Carbonates

Private Label volumes remain small. Major retailers Wal-Mart and Lotus offer their own brand of carbonates, but supplies are low and erratic.

Juice

Private Label has been in the market for a few years with very small and unstable volume due to lack of market recognition. Lotus at one point contracted Fruit Village to produce Private Label but stopped in 2008 due to little demand. Private Label stagnated in 2008 due to lack of market demand.

Nectars

No Private Label visible on the market.

Still Drinks

There is some Private Label in this category offering fruit still drinks, herbal drinks and nut drinks. International retailers are most active in the Private Label business, such as Carrefour, Wal-Mart, Dia and Lotus. Lianhua is the most active Chinese-owned chain of supermarkets (named Lianhua) and hypermarkets (named Shiji Lianhua). 2007 saw growth although volume was small and unstable. In 2008 Private Label did not perform well due to the financial crisis limiting marketing support for Private Label products.