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global
SOFT DRINKS



Soft Drinks Service

Brazil

Soft Drinks Review

2009 Cycle

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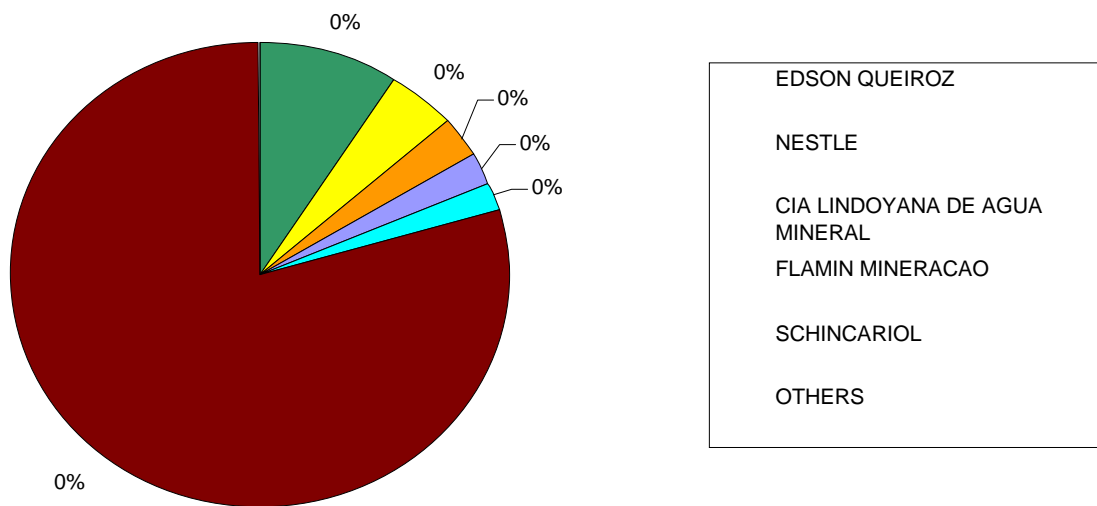
BOTTLED WATER - CATEGORY PROFILE

Key Facts

Market Size	Million Litres	Litres per Capita		
Consumption 2008				
Growth	CAGR % 03-08	CAGR % 05-08	CAGR % 07-08	
Consumption M Litres				
Market Value	BRL Million	BRL/Litre	US\$ Million	US\$/Litre
Value (at consumer price)				
Segmentation 2008	Still	Carbonated		
% Share				
Distribution 2008	Off-Premise	On-Premise		
% Share				
Packaging 2008	PET	Glass	PVC	Other
% Share				

SOURCE : Trade Interviews; Canadean Wisdom

Chart - Bottled Water Leading Trademark Owners 2008



SOURCE : Canadean Wisdom



Bottled Water Commentary

Current & Emerging Trends

Outlook

Segmentation

Functional Products

DOBs/DOB Producers



Bottled Water Commentary

Marketing

Pricing/Valuation

Distribution

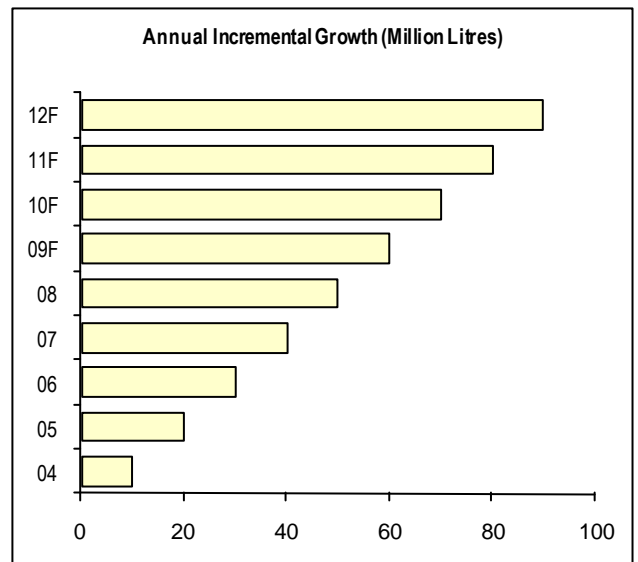
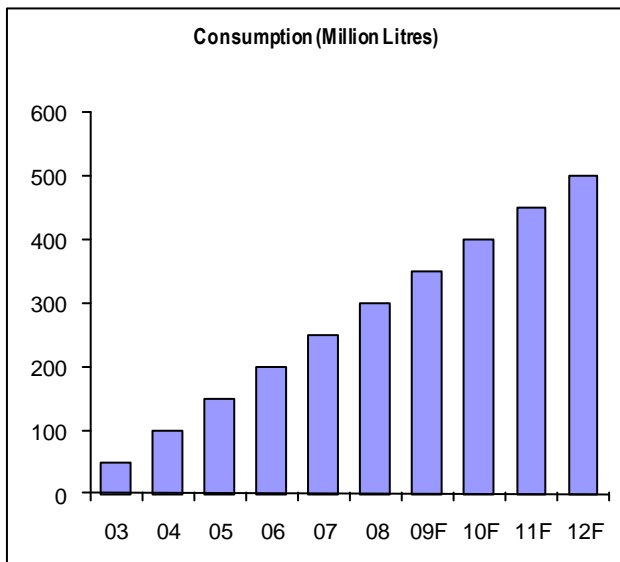
Packaging



Bottled Water Commentary

**Bottled Water
New Products
2008**

Bottled Water - Consumption, 2003-2009F	2003	2004	2005	2006	2007	2008	2009F
Consumption (million litres)							
Litres per capita							
Population (millions)							
Import Volume (million litres)							
Imports' Share Of Consumption %							



Bottled Water - Forecast Consumption, 2010F-2012F	2010F	2011F	2012F
Consumption (million litres)			
Litres per capita			
Population (millions)			



Bottled Water - Segments, 2007-2009F	2007 %	2008 %	2009F %
Total	100.0	100.0	100.0
Still			
Sparkling			
Mineral/Spring			
Table			

Bottled Water - Packaging, 2007-2009F	2007 %	2008 %	2009F %
Total	100.0	100.0	100.0
Glass			
Plastic			
- PET			
- PVC			
- Other Plastic			
Board			
Metal			
Other Packaging Material			
Returnable/refillable			
One-Way/non-refillable			
Single-serve (<= 60cl)			
Multi-serve (> 60cl)			

Bottled Water - Distribution, 2007-2009F	2007 %	2008 %	2009F %
Total	100.0	100.0	100.0
Off-Premise (Retail/At Home)			
On-Premise (Away from Home)			

Bottled Water - Leading Companies, 2007-2008	2007 %	2008 %
Edson Queiroz		
Nestle		
Cia Lindoyana de Agua Mineral		
Flamin Mineracao		
Schincariol		