

canadean 

global
SOFT DRINKS



Soft Drinks Service

Canada

Soft Drinks Review

2009 Cycle

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CONTENTS

Bottled Water Category Profile

- Key Facts – Chart – Leading Trademark Owners 2008
- Commentary / Summary Text
- Consumption – Million Litres/Litres per Capita, 2003-2012F
- Population – Millions, 2003-2012F
- Import Volume - Million Litres, 2003-2009F
- Imports' Share of Consumption %, 2003-2009F
- Chart - Consumption – Million Litres, 2003-2012F
- Chart – Annual Incremental Growth – Million Litres, 2004-2012F
- Segment, % Shares, 2007-2009F
- Packaging, % Shares, 2007-2009F
- Distribution, % Shares, 2007-2009F
- Leading Companies, % Shares, 2007-2008

Bulk/HOD Water Category Profile

- Key Facts – Chart – Leading Trademark Owners 2008
- Commentary / Summary Text
- Consumption – Million Litres/Litres per Capita, 2003-2012F
- Population – Millions, 2003-2012F
- Chart - Consumption – Million Litres, 2003-2012F
- Chart – Annual Incremental Growth – Million Litres, 2004-2012F
- Segment, % Shares, 2007-2009F
- Packaging, % Shares, 2007-2009F
- Distribution, % Shares, 2007-2009F
- Leading Companies, % Shares, 2007-2008

Carbonates Category Profile

- Key Facts – Chart – Leading Trademark Owners 2008
- Commentary / Summary Text
- Consumption – Million Litres/Litres per Capita, 2003-2012F
- Population – Millions, 2003-2012F
- Million Cases, 192oz or 24 x 8oz 2003-2012F
- 8oz servings per capita, 2003-2012F
- Chart - Consumption – Million Litres, 2003-2012F
- Chart – Annual Incremental Growth – Million Litres, 2004-2012F
- Segment, % Shares, 2007-2009F
- Packaging, % Shares, 2007-2009F
- Distribution, % Shares, 2007-2009F
- Leading Companies, % Shares, 2007-2008

Juice & Nectars Category Profile

- Key Facts – Chart – Leading Trademark Owners 2008
- Commentary / Summary Text
- Consumption – Million Litres/Litres per Capita, 2003-2012F
- Population – Millions, 2003-2012F
- Chart - Consumption – Million Litres, 2003-2012F
- Chart – Annual Incremental Growth – Million Litres, 2004-2012F
- Segment, % Shares, 2007-2009F
- Packaging, % Shares, 2007-2009F
- Distribution, % Shares, 2007-2009F
- Leading Companies, % Shares, 2007-2008



Still Drinks Category Profile

- Key Facts – Chart – Leading Trademark Owners 2008
- Commentary / Summary Text
- Consumption – Million Litres/Litres per Capita, 2003-2012F
- Population – Millions, 2003-2012F
- Chart - Consumption – Million Litres, 2003-2012F
- Chart – Annual Incremental Growth – Million Litres, 2004-2012F
- Segment, % Shares, 2007-2009F
- Packaging, % Shares, 2007-2009F
- Distribution, % Shares, 2007-2009F
- Leading Companies, % Shares, 2007-2008

Squash/Syrups Category Profile

- Key Facts – Chart – Leading Trademark Owners 2008
- Commentary / Summary Text
- Consumption – Million Litres/Litres per Capita, 2003-2012F
- Population – Millions, 2003-2012F
- Chart - Consumption – Million Litres, 2003-2012F
- Chart – Annual Incremental Growth – Million Litres, 2004-2012F
- Segment, % Shares, 2007-2009F
- Packaging, % Shares, 2007-2009F
- Distribution, % Shares, 2007-2009F
- Leading Companies, % Shares, 2007-2008

Fruit Powders Category Profile

- Key Facts – Chart – Leading Trademark Owners 2008
- Commentary / Summary Text
- Consumption – Million Litres/Litres per Capita, 2003-2012F
- Population – Millions, 2003-2012F
- Other Powders, 2003-2009F
- Chart - Consumption – Million Litres, 2003-2012F
- Chart – Annual Incremental Growth – Million Litres, 2004-2012F
- Segment, % Shares, 2007-2009F
- Packaging, % Shares, 2007-2009F
- Distribution, % Shares, 2007-2009F
- Leading Companies, % Shares, 2007-2008

Iced/Rtd Tea Drinks Category Profile

- Key Facts – Chart – Leading Trademark Owners 2008
- Commentary / Summary Text
- Consumption – Million Litres/Litres per Capita, 2003-2012F
- Population – Millions, 2003-2012F
- Chart - Consumption – Million Litres, 2003-2012F
- Chart – Annual Incremental Growth – Million Litres, 2004-2012F
- Segment, % Shares, 2007-2009F
- Packaging, % Shares, 2007-2009F
- Distribution, % Shares, 2007-2009F
- Leading Companies, % Shares, 2007-2008

Iced/Rtd Coffee Drinks Category Profile

- Key Facts – Chart – Leading Trademark Owners 2008
- Commentary / Summary Text
- Consumption – Million Litres/Litres per Capita, 2003-2012F
- Population – Millions, 2003-2012F



- Chart - Consumption – Million Litres, 2003-2012F
- Chart – Annual Incremental Growth – Million Litres, 2004-2012F
- Segment, % Shares, 2007-2009F
- Packaging, % Shares, 2007-2009F
- Distribution, % Shares, 2007-2009F
- Leading Companies, % Shares, 2007-2008

Sports Drinks Category Profile

- Key Facts – Chart – Leading Trademark Owners 2008
- Commentary / Summary Text
- Consumption – Million Litres/Litres per Capita, 2003-2012F
- Population – Millions, 2003-2012F
- Chart - Consumption – Million Litres, 2003-2012F
- Chart – Annual Incremental Growth – Million Litres, 2004-2012F
- Segment, % Shares, 2007-2009F
- Packaging, % Shares, 2007-2009F
- Distribution, % Shares, 2007-2009F
- Leading Companies, % Shares, 2007-2008

Energy Drinks Category Profile

- Key Facts – Chart – Leading Trademark Owners 2008
- Commentary / Summary Text
- Consumption – Million Litres/Litres per Capita, 2003-2012F
- Population – Millions, 2003-2012F
- Chart - Consumption – Million Litres, 2003-2012F
- Chart – Annual Incremental Growth – Million Litres, 2004-2012F
- Segment, % Shares, 2007-2009F
- Packaging, % Shares, 2007-2009F
- Distribution, % Shares, 2007-2009F
- Leading Companies, % Shares, 2007-2008

Appendices

Methodology

Product Definitions

Packaging Definitions

Glossary



TYPICAL CATEGORY PROFILE

BOTTLED WATER - CATEGORY PROFILE	2
Key Facts	2
Chart - Bottled Water Leading Trademark Owners 2008	2
Bottled Water Commentary	3
Current & Emerging Trends	3
Outlook	3
Segmentation	3
Functional Products	4
DOBs/DOB Producers	4
Marketing	4
Pricing/Valuation	4
Distribution	4
Packaging	4
Bottled Water New Products 2008	5
Bottled Water - Consumption, 2003-2009F	5
Bottled Water - Forecast Consumption, 2010F-2012F	5
Bottled Water - Segments, 2007-2009F	6
Bottled Water - Packaging, 2007-2009F	6
Bottled Water - Distribution, 2007-2009F	6
Bottled Water - Leading Companies, 2007-2008	6



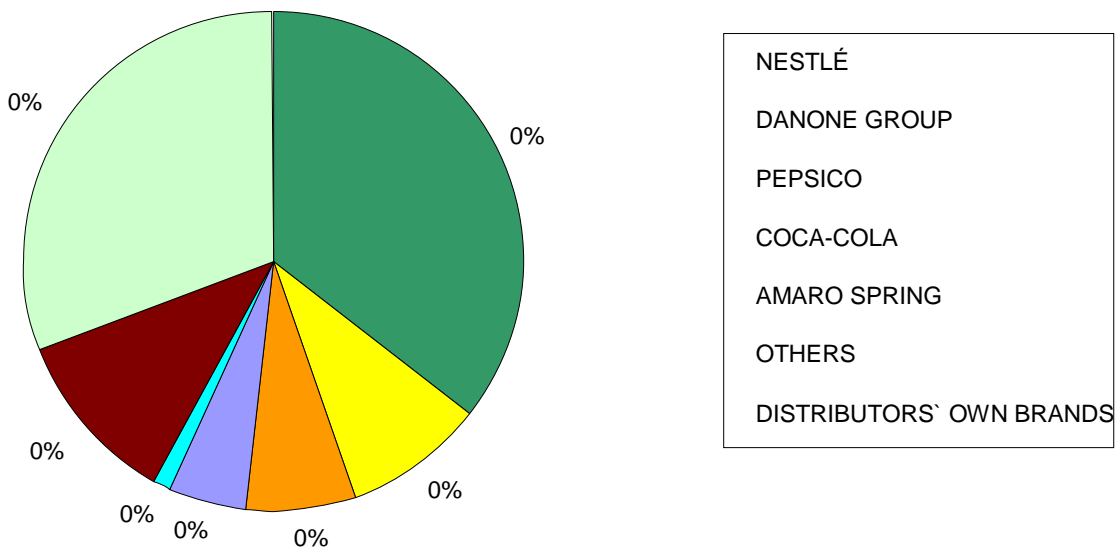
BOTTLED WATER - CATEGORY PROFILE

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	CAD Million	CAD/Litre	US\$ Million	US\$/Litre
Value (at consumer price)				
Segmentation 2008	Still	Carbonated		
% Share				
Distribution 2008	Off-Premise	On-Premise		
% Share				
Packaging 2008	PET	HDPE	Glass	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



Bottled Water Commentary

Functional Products

DOBs/DOB Producers

Marketing

Pricing/Valuation

Distribution

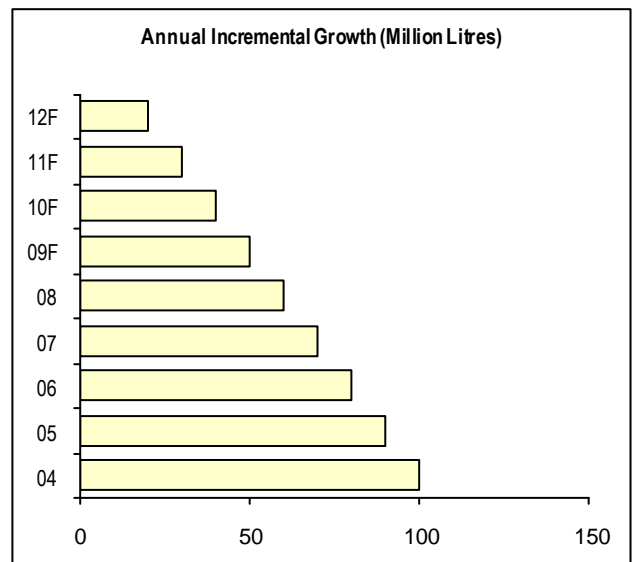
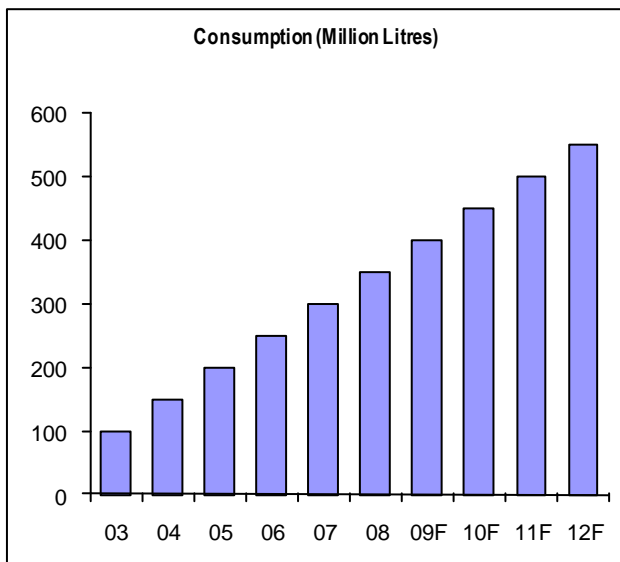
Packaging



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 %
Nestle		
Danone Group		
PepsiCo		
Coca-Cola		
Amaro Spring		