

canadean 

global
SOFT DRINKS



Soft Drinks Service

Croatia

Soft Drinks Review

2009 Cycle

Canadean Contacts:

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

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

Editorial:

Antonella Reda, Managing Editor

Clare Gilham, Edit Manager

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.

Canadean prints its reports on 100% recycled paper using 80% post consumer waste.

Visit the Canadean website @ www.canadean.com



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	3
DOBs/DOB Producers	3
Marketing	4
Pricing/Valuation	4
Distribution	4
Packaging	4
Bottled Water New Products 2008	4
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



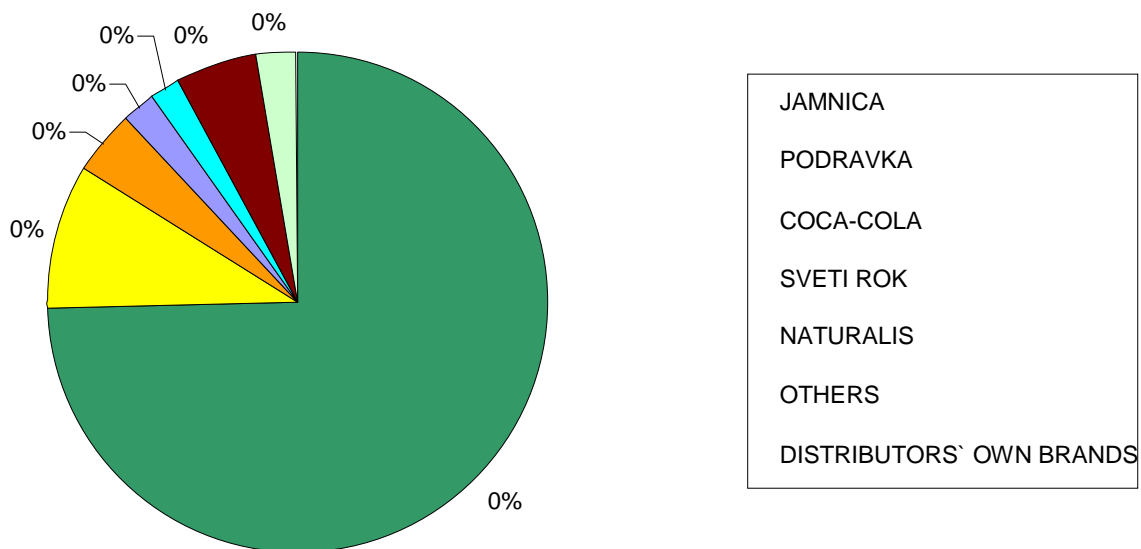
BOTTLED WATER - CATEGORY PROFILE

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 2008	HRK Million	HRK /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		
% 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

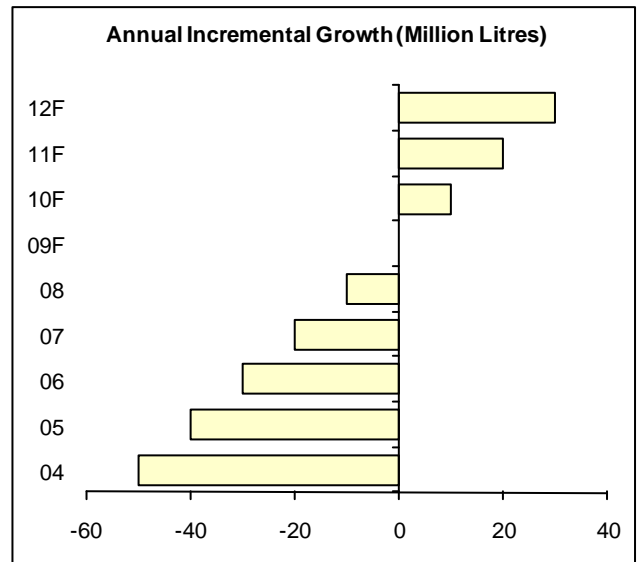
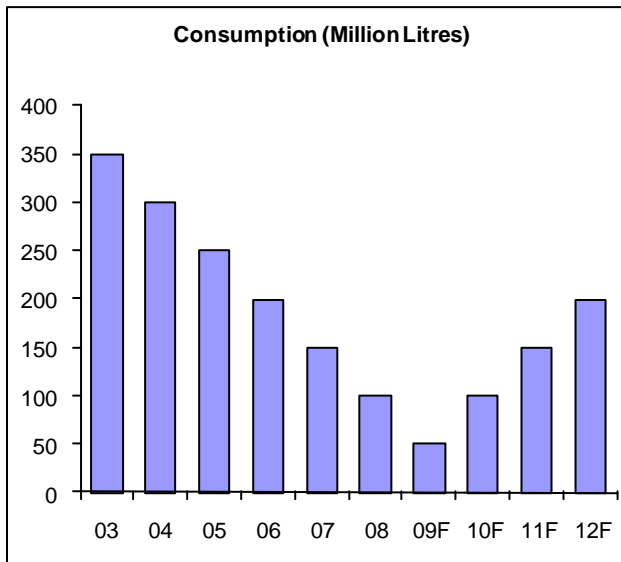
Packaging

**Bottled Water
New Products
2008**



Bottled Water Commentary

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 %
Jamnica		
Podravka		
Coca-Cola		
Sveti Rok		
Naturalis		