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2011 Global Bottled Water Congress and market trends

Richard Hall
Chairman

Matt Wilton
Commercial Consulting Director

Webinar
Wednesday 13 July 2011

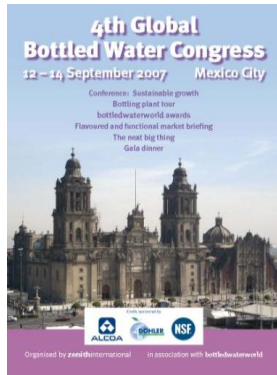
2011 Global Bottled Water Congress

Richard Hall
Chairman, Zenith International

Event outline

- 8th Global Bottled Water Congress
- 13-15 September 2011, Rio de Janeiro
- In association with ABINAM
- 150 -200 delegates each year from top global and regional producers
- Sponsored by leading industry suppliers Aptar, Bericap, ColorMatrix, IDS Borjomi, NSF
- Full programme and online booking at www.zenithinternational.com/events
- Discounted rates available until 12 August 2011

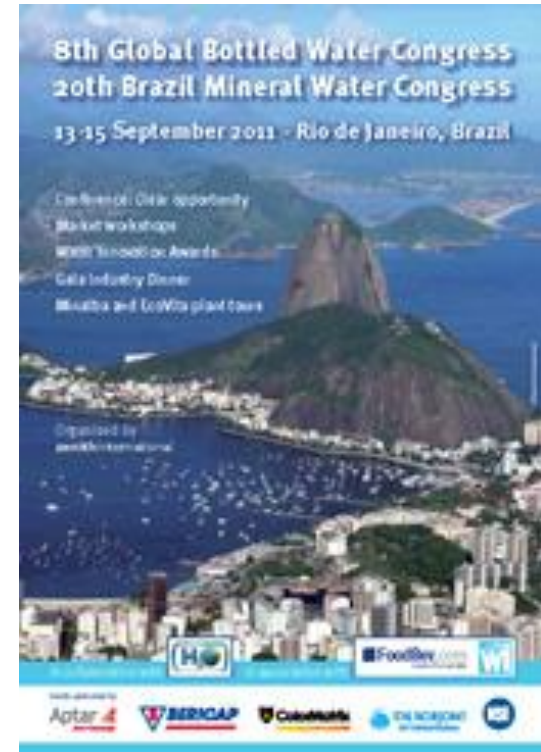
Previous Congresses



2011 programme

- Minalba and EcoVita plant tours
- Conference: Clear opportunity
- Gala Dinner
- Water innovation Awards

Entries by 12 August, full details at
www.waterinnovationawards.com



Clear opportunity

- Regional overview
- Global market perspectives
- Key industry challenges
- Growth business case studies
- Ethics and the environment
- Building iconic brands
- Beyond plain water
- Market workshops

Conference speakers

Global market leaders

- Coca-Cola
- Nestlé
- SanPellegrino

Regional and other leaders

- DS Waters
- EcoVita
- Edson Queiroz
- Glacéau
- IDS Borjomi
- Aguas de Mondariz
- San Benedetto

Innovators

- Cartils
- Cascadia
- Centralcer

Other key influencers

- Aptar
- Bericap
- FoodBev
- Kantar Worldpanel
- NSF
- Rabobank

Global bottled water market trends

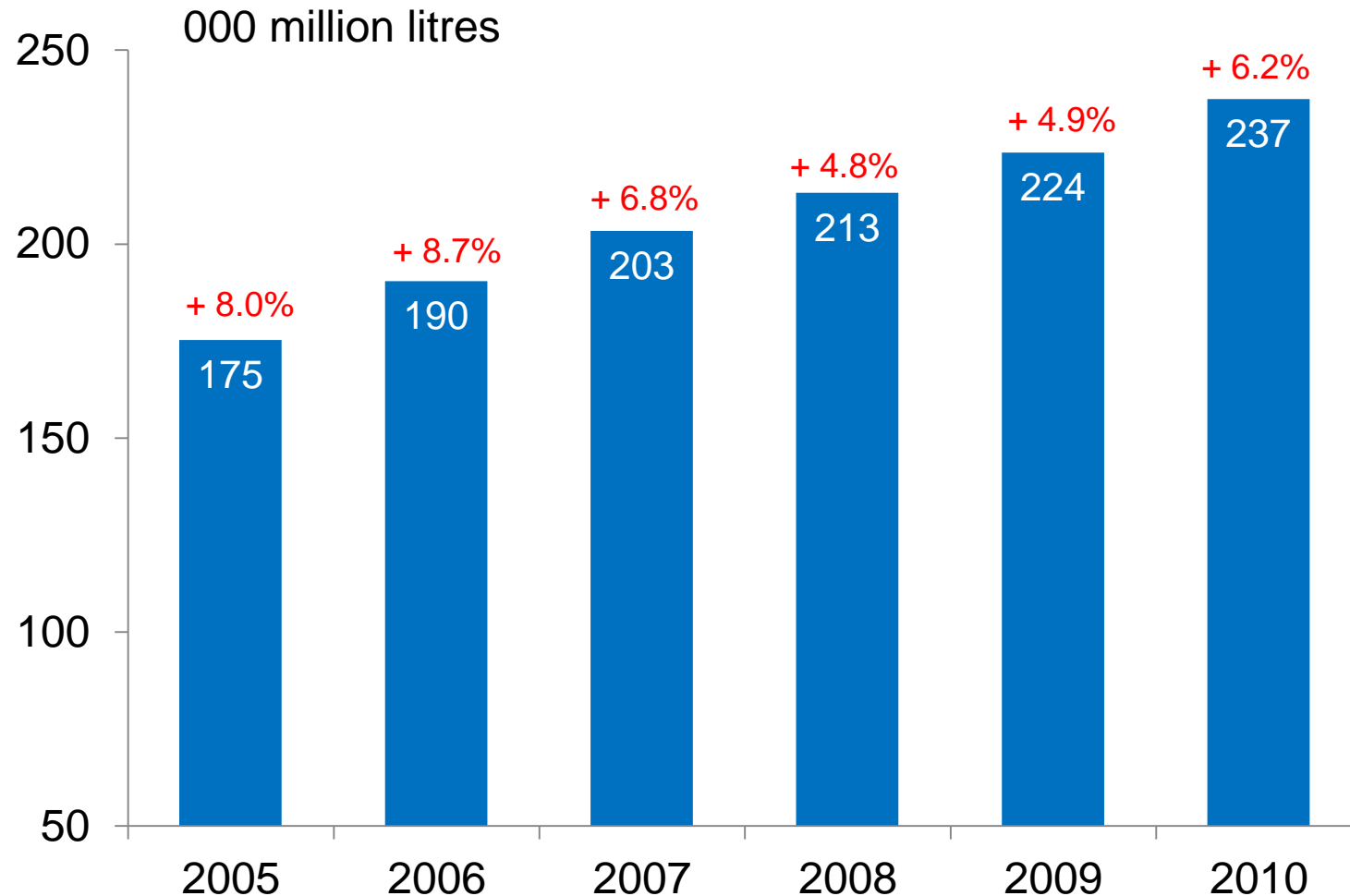
Matt Wilton

Commercial Consulting Director, Zenith International

Global bottled water overview



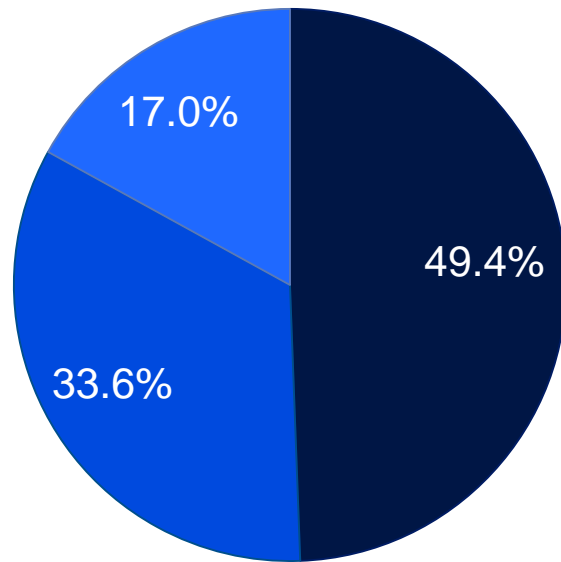
Global bottled water volume, 2005-10



Source: Zenith International
76 countries

Global bottled water types, 2005-10

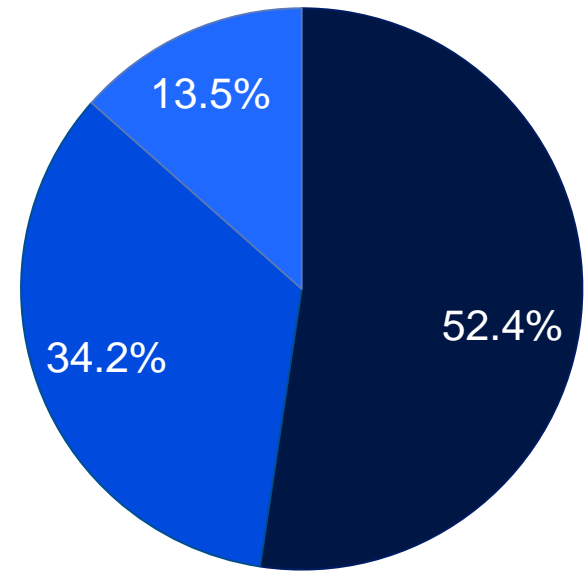
2005



175 billion litres

2010

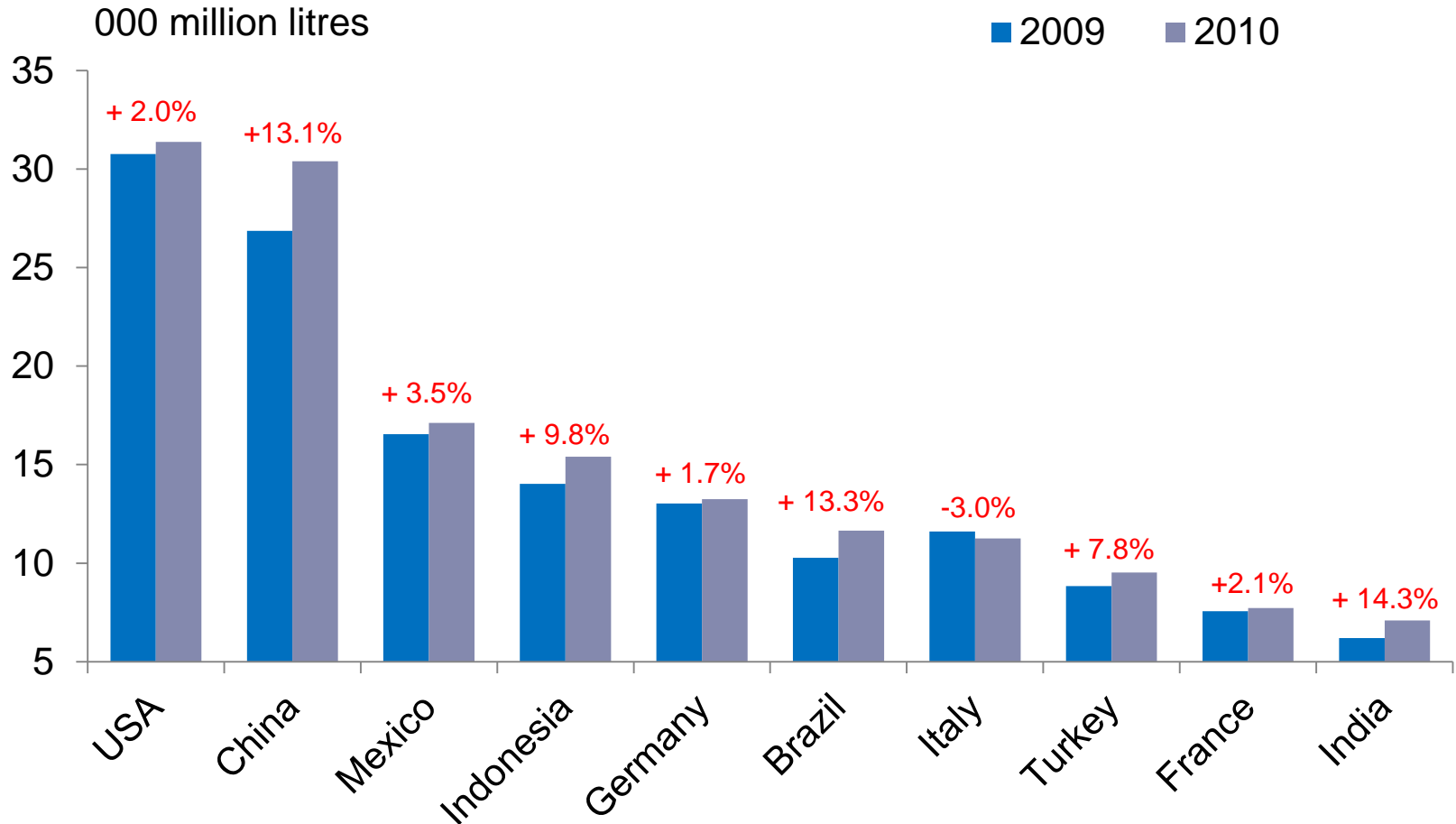
- Still to 10 litres
- Still bulk over 10 litres
- Sparkling



237 billion litres

Source: Zenith International
76 countries

Top 10 bottled water countries, 2009-10



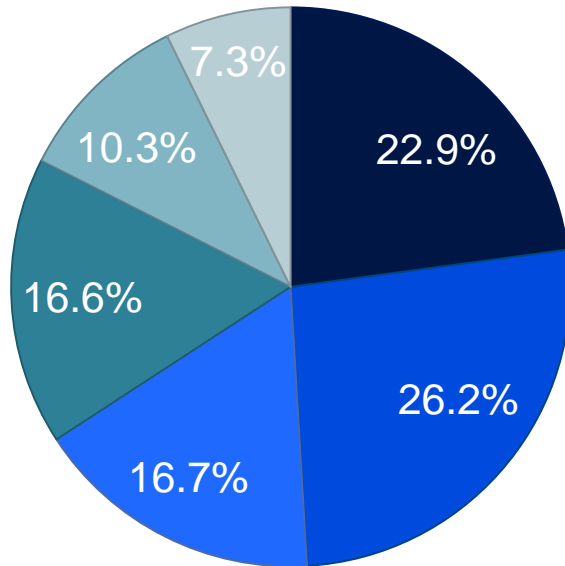
Source: Zenith International
76 countries

Global trends 2010-11

- Growing appreciation of hydration for health and wellness
- Environmental credentials increasingly important
- Some anti-bottled water sentiment: schools, local government
- Innovation in lightweighting, use of rPET and alternative packaging options
- Pressure on pricing – affordability, materials, tax
- New debate about common messages, e.g. 100% recyclable

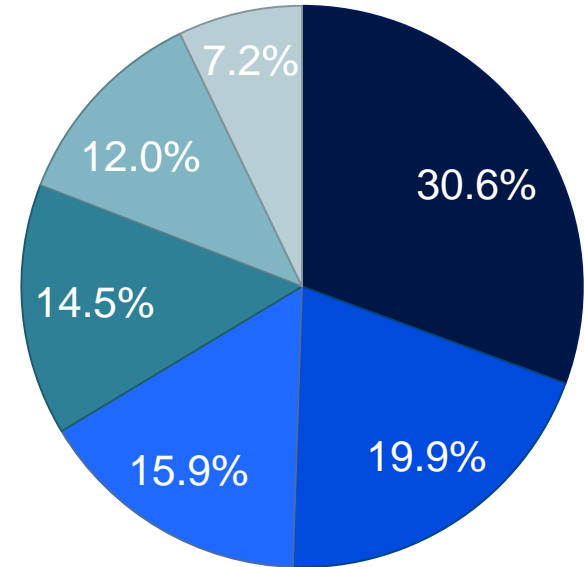
Global bottled water regions, 2005-10

2005



175 billion litres

2010

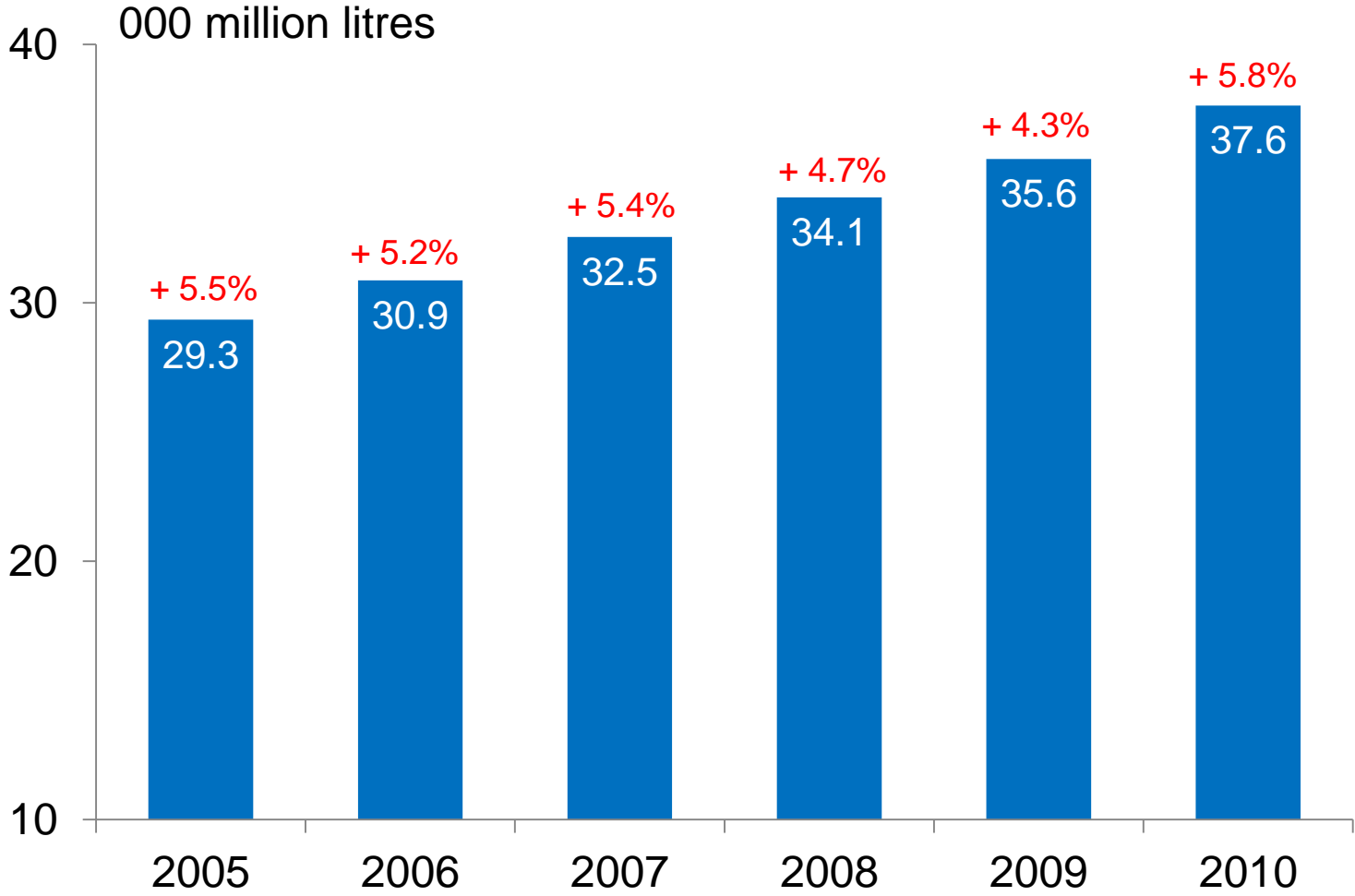


237 billion litres

- Asia & Australasia
- West Europe
- Central & Latin America
- North America
- Africa & Middle East
- East Europe

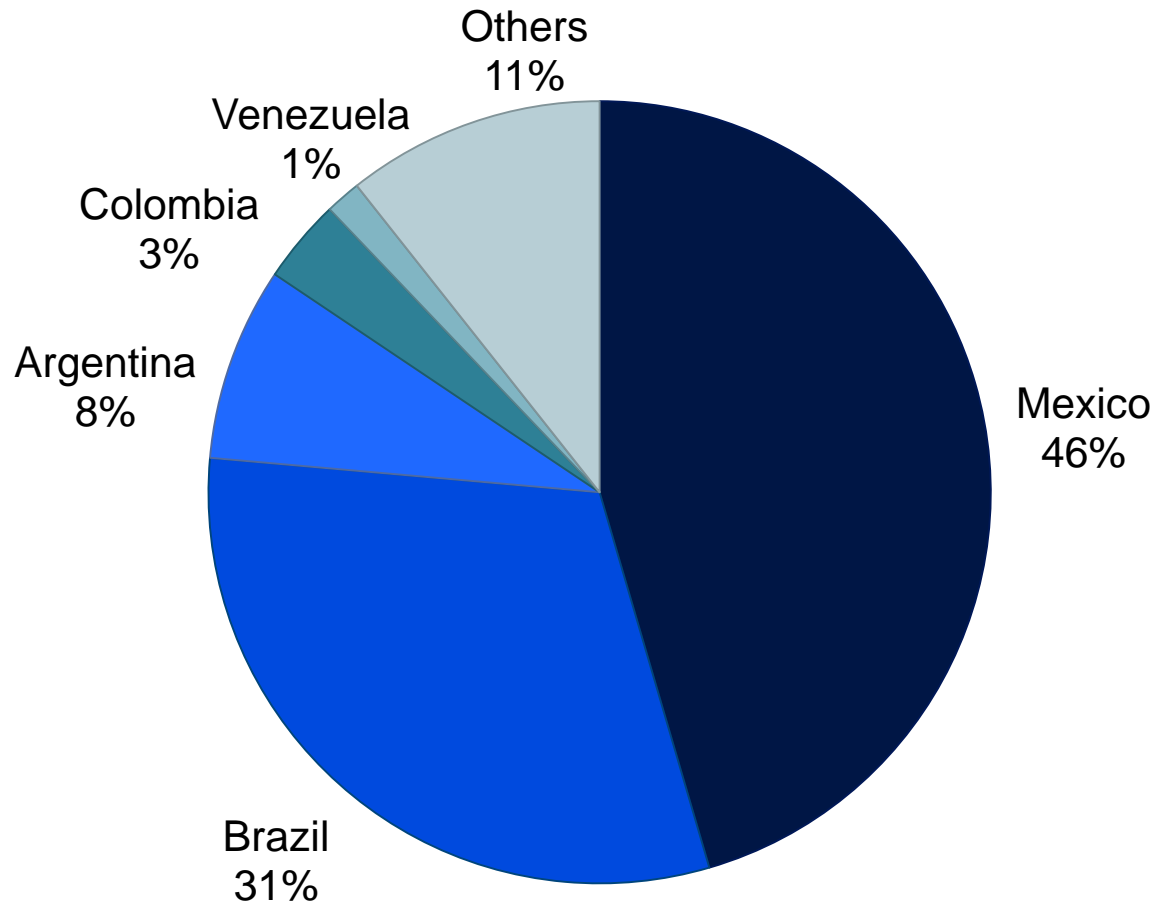
Source: Zenith International
76 countries

Latin America bottled water volume, 2005-10



Source: Zenith International
76 countries

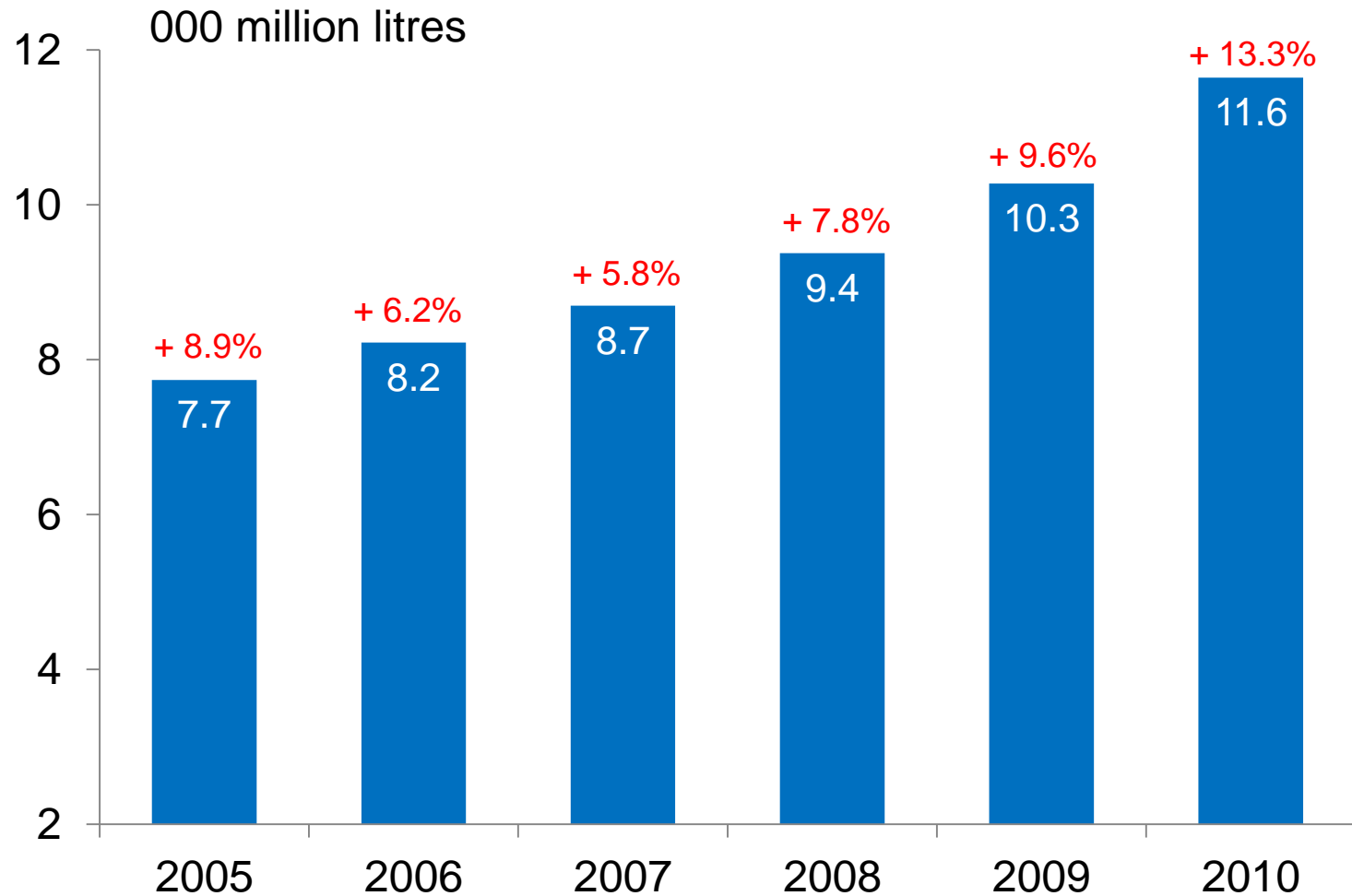
Latin America countries by volume, 2010



Total 38 billion litres

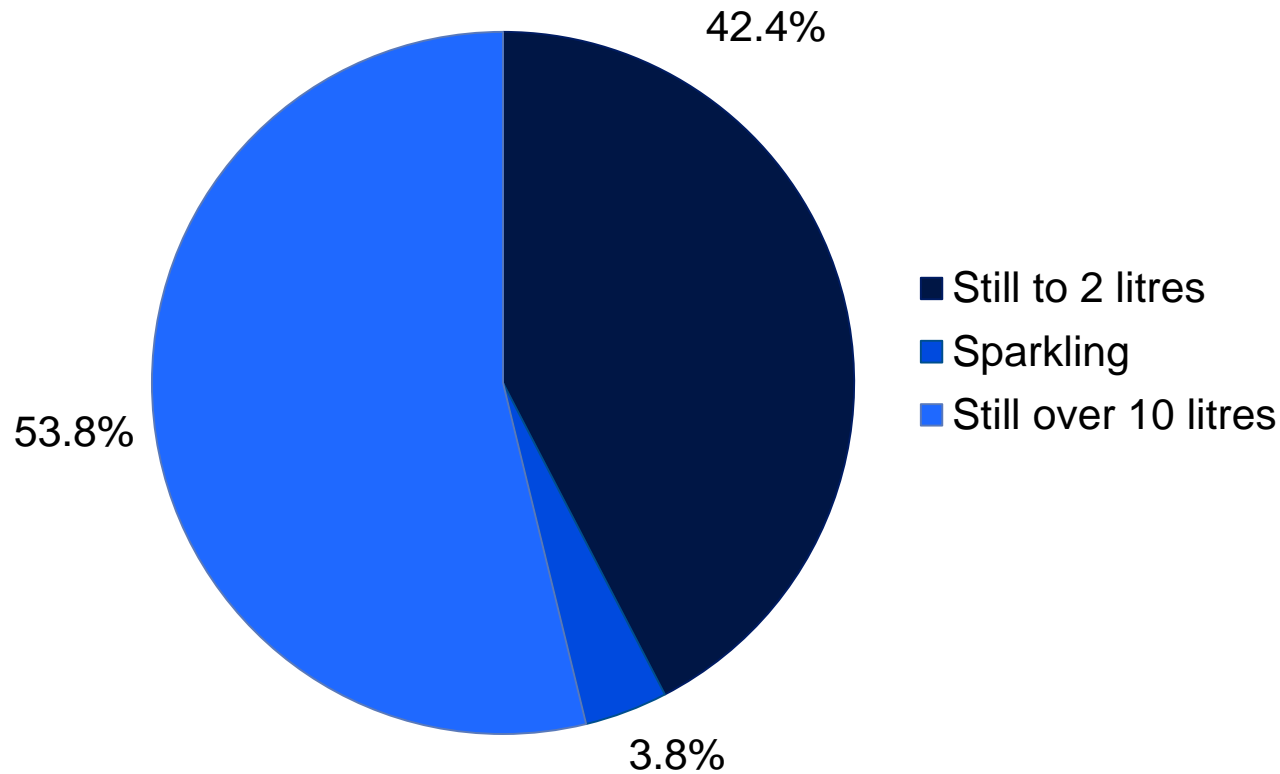
Source: Zenith International
76 countries

Brazil bottled water volume, 2005-10



Source: Zenith International
76 countries

Brazil bottled water segments, 2010

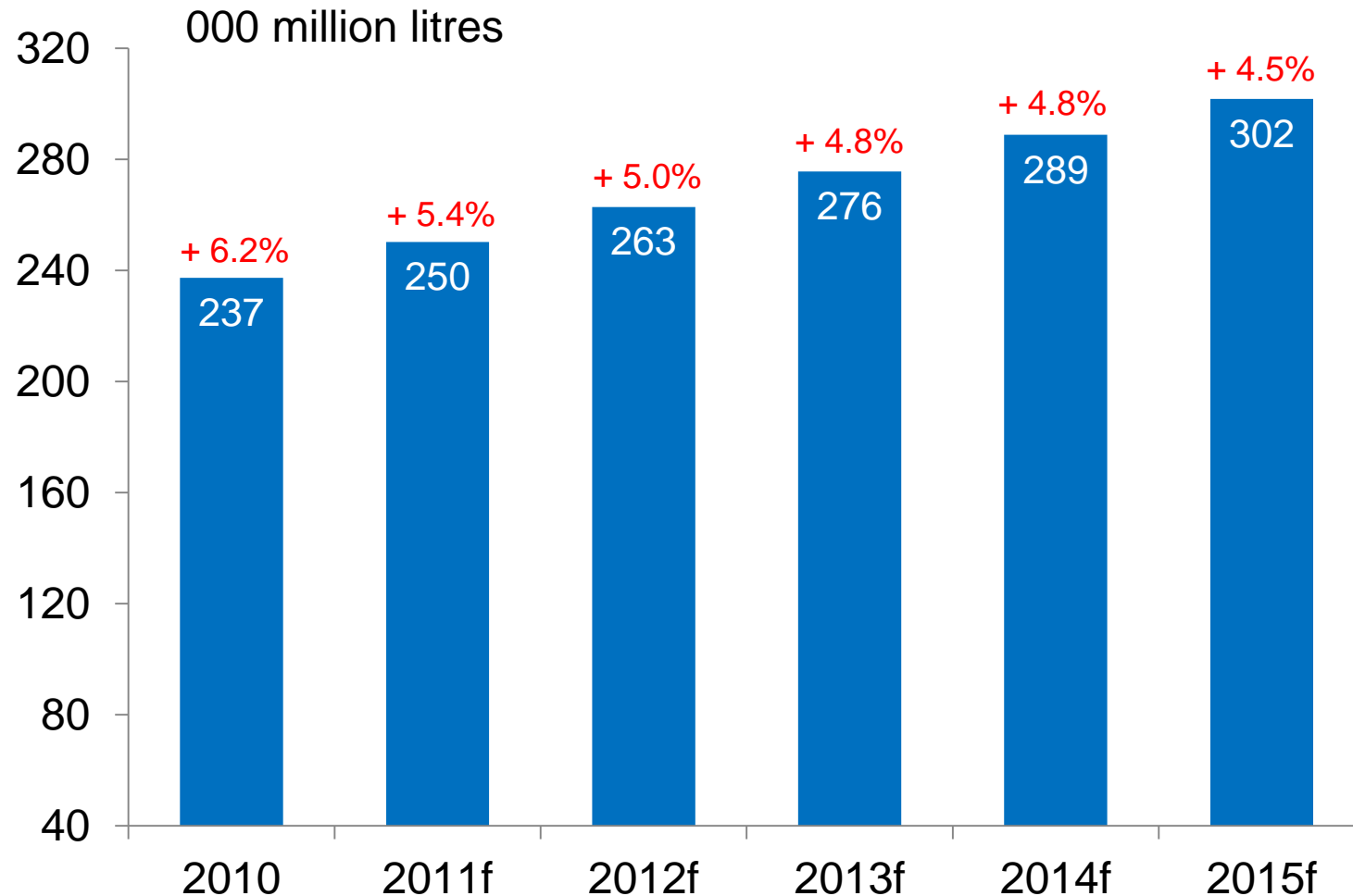


Total 12 billion litres



Source: Zenith International
76 countries

Global bottled water volume, 2010-15



Source: Zenith International
76 countries

2011 impressions so far

- North America – return to growth in 2010, continuing into 2011
- West Europe – mature markets remain fairly flat
- East Europe – mixed results due to struggling economies. Russia and Poland boosting growth in 2010 and beyond
- Asia – continued strong growth driven by China and India
- Other regions – Africa, Middle East and Latin America still performing well

Summary and future evolution

- In the next 5 years, growth to be driven by Asia Pacific, Africa and Middle East
- Lack of mains water a key driver for growth in these markets: 5 gallon and small pack
- Still bottled water to benefit from convenience factor in a number of markets
- Innovation in packaging key to ensure the category retains momentum

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For more information about the Global Bottled Water Congress, please contact:

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