

**Zenith Report on
Global Soft Drinks**

November 2008

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CONTENTS

Report note	
Market definitions	1
 PART I – HISTORIC MARKET ANALYSIS	
 MARKET COMMENTARY 2002-2007	
Global market analysis	2
Global ranking analysis	3
Volume and consumption per person	
Fastest growing markets	5
Global developments	6
 GLOBAL SOFT DRINKS	
Charts	
Global soft drinks volume by region, 2002-2007	8
Global soft drinks volume by region percentage share, 2007	
Global soft drinks market share by sector, 2007	9
North America soft drinks market share by sector, 2007	
Latin America soft drinks market share by sector, 2007	10
West Europe soft drinks market share by sector, 2007	
East Europe soft drinks market share by sector, 2007	11
Africa soft drinks market share by sector, 2007	
Middle East soft drinks market share by sector, 2007	12
Asia/Australasia soft drinks market share by sector, 2007	
 Tables	
Global soft drinks market volume by country and region, 2002-2007	13
Global soft drinks market shares by country and region, 2007	18
Global soft drinks percentage change by country and region, 2002-2007	23
Global soft drinks consumption per person by country and region, 2002-2007	28
 Ranking – charts	
Global top 10 soft drinks countries by volume, 2007	33
Global top 10 soft drinks countries per person, 2007	
 Ranking – tables	
Global soft drinks market ranking by volume, 2007	34
 BOTTLED WATER	
Charts	
Global bottled water volume by region, 2002-2007	36
Global bottled water volume by region percentage share, 2007	
 Tables	
Global bottled water market volume by country and region, 2002-2007	37
Global bottled water percentage change by country and region, 2002-2007	42
Global bottled water consumption per person by country and region, 2002-2007	47

CONTENTS

Ranking – charts	
Global top 10 bottled water countries by volume, 2007	52
Global top 10 bottled water countries per person, 2007	
Ranking – tables	
Global bottled water market ranking by volume, 2007	53
 CARBONATES	
Charts	
Global carbonates volume by region, 2002-2007	55
Global carbonates volume by region percentage share, 2007	
Tables	
Global carbonates market volume by country and region, 2002-2007	56
Global carbonates percentage change by country and region, 2002-2007	61
Global carbonates consumption per person by country and region, 2002-2007	66
Ranking – charts	
Global top 10 carbonates countries by volume, 2007	71
Global top 10 carbonates countries per person, 2007	
Ranking – tables	
Global carbonates market ranking by volume, 2007	72
 DILUTABLES	
Charts	
Global dilutables volume by region, 2002-2007	74
Global dilutables volume by region percentage share, 2007	
Tables	
Global dilutables market volume by country and region, 2002-2007	75
Global dilutables percentage change by country and region, 2002-2007	80
Global dilutables consumption per person by country and region, 2002-2007	85
Ranking – charts	
Global top 10 dilutables countries by volume, 2007	90
Global top 10 dilutables countries per person, 2007	
Ranking – tables	
Global dilutables market ranking by volume, 2007	91
 FRUIT JUICE/NECTARS	
Charts	
Global fruit juice/nectars volume by region, 2002-2007	93
Global fruit juice/nectars volume by region percentage share, 2007	
Tables	
Global fruit juice/nectars market volume by country and region, 2002-2007	94

CONTENTS

Global fruit juice/nectars percentage change by country and region, 2002-2007	99
Global fruit juice/nectars consumption per person by country and region, 2002-2007	104
Ranking – charts	
Global top 10 fruit juice/nectars countries by volume, 2007	109
Global top 10 fruit juice/nectars countries per person, 2007	
Ranking – tables	
Global fruit juice/nectars market ranking by volume, 2007	110
 STILL DRINKS	
Charts	
Global still drinks volume by region, 2002-2007	112
Global still drinks volume by region percentage share, 2007	
Tables	
Global still drinks market volume by country and region, 2002-2007	113
Global still drinks percentage change by country and region, 2002-2007	118
Global still drinks consumption per person by country and region, 2002-2007	123
Ranking – charts	
Global top 10 still drinks countries by volume, 2007	128
Global top 10 still drinks countries per person, 2007	
Ranking – tables	
Global still drinks market ranking by volume, 2007	129
 PART II – FORECAST MARKET ANALYSIS	
MARKET COMMENTARY 2007-2012	
Global market analysis	131
Global rankings analysis	132
Volume and consumption per person	
Fastest growing markets	134
 GLOBAL SOFT DRINKS	
Charts	
Global soft drinks volume by region, 2007-2012	136
Global soft drinks volume by region percentage share, 2012	
Global soft drinks market share by sector, 2012	137
North America soft drinks market share by sector, 2012	
Latin America soft drinks market share by sector, 2012	138
West Europe soft drinks market share by sector, 2012	
East Europe soft drinks market share by sector, 2012	139
Africa soft drinks market share by sector, 2012	
Middle East soft drinks market share by sector, 2012	140
Asia/Australasia soft drinks market share by sector, 2012	

CONTENTS

Tables

Global soft drinks market volume by country and region, 2007-2012	141
Global soft drinks sector shares by country and region, 2012	146
Global soft drinks percentage change by country and region, 2007-2012	151
Global soft drinks consumption per person by country and region, 2007-2012	156

Ranking – charts

Global top 10 soft drinks countries by volume, 2012	161
Global top 10 soft drinks countries per person, 2012	

Ranking tables

Global soft drinks market ranking by volume, 2012	162
---	-----

BOTTLED WATER

Charts

Global bottled water volume by region, 2007-2012	164
Global bottled water volume by region percentage share, 2012	

Tables

Global bottled water market volume by country and region, 2007-2012	165
Global bottled water percentage change by country and region, 2007-2012	170
Global bottled water consumption per person by country and region, 2007-2012	175

Ranking charts

Global top 10 bottled water countries by volume, 2012	180
Global top 10 bottled water countries per person, 2012	

Ranking tables

Global bottled water market ranking by volume, 2012	181
---	-----

CARBONATES

Charts

Global carbonates volume by region, 2007-2012	183
Global carbonates volume by region percentage share, 2012	

Tables

Global carbonates market volume by country and region, 2007-2012	184
Global carbonates percentage change by country and region, 2007-2012	189
Global carbonates consumption per person by country and region, 2007-2012	194

Ranking charts

Global top 10 carbonates countries by volume, 2012	199
Global top 10 carbonates countries per person, 2012	

Ranking – tables

Global carbonates market ranking by volume, 2012	200
--	-----

CONTENTS

DILUTABLES

Charts

Global dilutables volume by region, 2007-2012	202
Global dilutables volume by region percentage share, 2012	

Tables

Global dilutables market volume by country and region, 2007-2012	203
Global dilutables percentage change by country and region, 2007-2012	208
Global dilutables consumption per person by country and region, 2007-2012	213

Ranking – charts

Global top 10 dilutables countries by volume, 2012	218
Global top 10 dilutables countries per person, 2012	

Ranking – tables

Global dilutables market ranking by volume, 2012	219
--	-----

FRUIT JUICE/NECTARS

Charts

Global fruit juice/nectars volume by region, 2007-2012	221
Global fruit juice/nectars volume by region percentage share, 2012	

Tables

Global fruit juice/nectars market volume by country and region, 2007-2012	222
Global fruit juice/nectars percentage change by country and region, 2007-2012	227
Global fruit juice/nectars consumption per person by country and region, 2007-2012	232

Ranking – charts

Global top 10 fruit juice/nectars countries by volume, 2012	237
Global top 10 fruit juice/nectars countries per person, 2012	

Ranking – tables

Global fruit juice/nectars market ranking by volume, 2012	238
---	-----

STILL DRINKS

Charts

Global still drinks volume by region, 2007-2012	240
Global still drinks volume by region percentage share, 2012	

Tables

Global still drinks market volume by country and region, 2007-2012	241
Global still drinks percentage change by country and region, 2007-2012	246
Global still drinks consumption per person by country and region, 2007-2012	251

Ranking – charts

Global top 10 still drinks countries by volume, 2012	256
Global top 10 still drinks countries per person, 2012	

CONTENTS

Ranking – tables

Global still drinks market ranking by volume, 2012	257
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REPORT NOTE

This is the sixth Zenith Report on the Global Soft Drinks Market. Compiling this report was a tremendous, yet enjoyable, challenge. We are particularly grateful to all soft drinks companies across the globe that assisted during the research process.

All information contained in this report is featured on Zenith's website: www.globaldrinks.com. As a report purchaser you have access to global soft drinks information on the website. For any questions or comments about how to navigate through the many query and charting options online, or to confirm your user name and password to gain access – please e-mail support@globaldrinks.com with your inquiry.

At www.globaldrinks.com, via the site's online database, you can download Microsoft Excel files, view dynamic charts and fully interact with the information contained in this report. The website gives you a great many more options as to how the information is presented and we welcome any suggestions about how it might be improved. We shall also be continuously updating the website with any breaking market figures – ensuring that www.globaldrinks.com is a constantly evolving picture of the dynamic global drinks market.

Gary Roethenbaugh
Market Intelligence Director

Kasia Stepien
Market Analyst

MARKET DEFINITIONS

Bottled water

- ◆ Sparkling water including lightly carbonated water; still water
- ◆ Flavoured water without sweetening
- ◆ Natural mineral water; spring water; purified water; table water
- ◆ Packaged water; water coolers

Carbonates

- ◆ Ready to drink including draught dispense; home dispense
- ◆ Regular including sparkling juice; low calorie
- ◆ Cola; clear flavoured waters with sweetening; lemon including lemonade; lemon-lime; mixers including tonic and bitter drinks; orange; shandy
- ◆ Others including other fruit flavours, health drinks and herbal drinks

Dilutables

- ◆ Squashes, cordials, powders and other concentrates for dilution to taste by consumer, normally adding 4 parts water to 1 part product
- ◆ High juice (minimum 40% fruit content as sold); regular including squashes and cordials (minimum 25%); low sugar including no added sugar and sugar free
- ◆ Dilutables are expressed as concentrate except where measuring overall soft drinks market figures/shares, when ready to drink figures are used

Fruit juice/nectars

- ◆ Fruit juice (100% fruit content equivalent); nectars (25-99%)
- ◆ Freshly squeezed; not from concentrate; other chilled from concentrate; long life
- ◆ All uncarbonated

Still drinks

- ◆ Juice drinks (5-25% fruit content)
- ◆ Other still drinks (0-5%) including iced tea, non fruit drinks
- ◆ Sports drinks
- ◆ Please note that baby drinks are not included

Please note that some totals in the report may vary due to rounding.