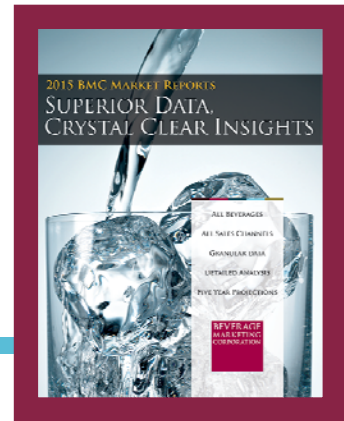


THE GLOBAL MULTIPLE BEVERAGE MARKETPLACE

2015 EDITION (Published December 2015. Data through 2014. Market projections through 2019.) More than 300 pages, with extensive text analysis, graphs, charts and more than 70 tables.



This international multiple beverage industry research report from Beverage Marketing Corporation offers worldwide and country trends and data. It includes volume, growth and per capita consumption statistics for eleven major beverage categories, with each considered in its own chapter as well as in the context of the overall marketplace. Developments by beverage type and country, plus five-year growth projections round out the coverage provided in this comprehensive global multiple beverage report.

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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

Put the world in perspective with this multiple beverage market research study that looks at international alcohol and non-alcohol beverage trends across key beverage sectors. Questions answered include:

- How do various countries around the world compare in overall and average consumption of beer, carbonated soft drinks, milk, tea, wine and other beverages?
- How large is the global sports beverage market? What about the energy drink market?
- What impact have developments in the large and growing Chinese market had on categories such as beer and distilled spirits?
- How have the rankings and output of the leading coffee producing nations changed?
- How do various countries' multiple beverage market share rankings compare? Which country's consumers lead the world in bottled water consumption? Which leads in beer?
- What will consumption statistics look like for each beverage category by 2019?

THIS MULTIPLE BEVERAGE INDUSTRY REPORT FEATURES

The Global Multiple Beverage Marketplace provides a comprehensive overview of the international beverage marketplace, looking at international trends for 11 major beverage categories. BMC's worldwide multiple beverage research coverage includes:

- A summary of developments in the major categories and gives a bird's eye view of the commercial beverage industry as a whole
- Discussion of current industry trends as well as a break-down of the industry down by volume by beverage category, including per capita consumption figures
- Concise discussions of each basic beverage type. Coverage of beer, bottled water, carbonated soft drinks (CSD), coffee, distilled spirits, energy drinks, fruit beverages, milk, sports beverages, tea and wine
- Beer production and consumption volume, growth and share by country
- Bottled water global consumption, share and growth by country
- Carbonated soft drink consumption and per capita data by country
- Coffee production and consumption by country
- Distilled spirits trends and consumption data by country
- A look at the size and growth of the global energy drink market
- Fruit beverage trends and country-by-country consumption data
- Details on fresh, whole cow milk production and growth by country as well as fluid milk consumption trends by country

- An overview of worldwide sports beverage volume and growth
- Tea production and consumption trends by country, plus per capita consumption statistics
- An overview of wine production and consumption by country
- Beverage Marketing's volume, per capita consumption and compound annual growth projections for each beverage group and analysis of the forces determining each category's future are also included in this global multiple beverage market report.

The Global Multiple Beverage Marketplace

December 2015

BEVERAGE
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NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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Countries in every part of the world produce and consume beer. A small number of nations are especially productive, but countries with significant levels of output brew and drink beer all around the globe.

- Five of the six major geographical regions of the world had countries ranking among the 20 most productive nations in 2014. Africa, Asia/Middle East, Europe, North America and South America each had one or more prominent brewing nations.
- Australia/Oceania long had a player among the top 20, but Australia has fallen off the bottom of the list as intensified output from Asian countries like Thailand and Viet Nam, Eastern European markets such as Poland and Ukraine, and African and South American nations altered the global brewing landscape. In 2014, Australia was the 25th largest brewing nation, behind 24th-place Belgium-Luxembourg. Viet Nam, Nigeria and Thailand ranked among the top 20 in 2014.
- The countries that make sizeable quantities of beer generally consume proportionally large amounts as well. For example, with the exception of one country, the 10 largest beer-producing countries also ranked as the 10 biggest consuming countries. (Top-10 producer Viet Nam still ranked as the 11th biggest consumer.)

Beer's apparently universal appeal obscures some definite regional differences. While brewers make and market beer on every continent, history, culture and economic development contribute decisively to the popularity of beer and the magnitude of national and regional beer markets.

- For many years, the most economically advanced industrialized countries dominated the international beer industry. Europe long accounted for almost one-third of global beer production and out produced all other regions.
- The increasingly dynamic Asian/Middle Eastern market, which previously surpassed North America in beer production, displaced Europe as the leading beer-brewing region in 2009 with nothing to suggest that it won't continue to enlarge its share of global beer volume for the indefinite future.
- Those countries with long traditions of beer production and consumption – which tend to be clustered in Europe – consume beer at a much higher rate than the rest of the world. That has not changed even with Asia's ascendance in output. For example, nine of the 10 countries with the highest per capita beer consumption in 2014 were located in Europe.

Exhibit 1.3

GLOBAL BEVERAGE MARKET
CHANGE IN VOLUME BY CATEGORY (r)
2010 – 2014

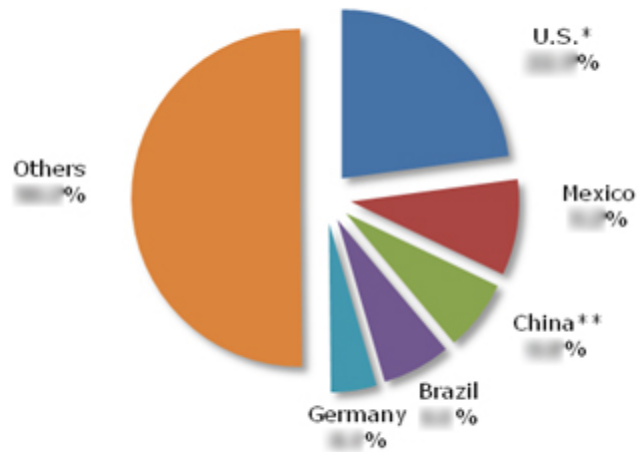
Category	2009/10	2010/11	2011/12	2012/13	2013/14
Beer	1.0%	1.0%	1.0%	1.1%	1.0%
Bottled Water	1.1%	1.1%	1.1%	1.1%	1.1%
Carbonated Soft Drinks	1.1%	1.1%	1.1%	1.1%	1.1%
Coffee	1.1%	1.1%	1.1%	1.1%	1.1%
Distilled Spirits	1.1%	1.1%	1.1%	1.1%	1.1%
Energy Drinks	1.1%	1.1%	1.1%	1.1%	1.1%
Fruit Beverages	1.1%	1.1%	1.1%	1.1%	1.1%
Milk	1.1%	1.1%	1.1%	1.1%	1.1%
Sports Beverages	1.1%	1.1%	1.1%	1.1%	1.1%
Tea	1.1%	1.1%	1.1%	1.1%	1.1%
Wine	1.1%	1.1%	1.1%	1.1%	1.1%
Subtotal	1.1%	1.1%	1.1%	1.1%	1.1%
Others*	1.1%	1.1%	1.1%	1.1%	1.1%
TOTAL	1.1%	1.1%	1.1%	1.1%	1.1%

(r) Revised

* Includes all beverages, commercial and non-commercial, such as tap water.

Source: Beverage Marketing Corporation

FIVE COUNTRIES COMSUME ALMOST 50% OF CSDS
Shares of global soft drink volume by leading countries, 2014



* Includes Guam and the U.S. Virgin Islands.

** Includes Taiwan.

Source: Beverage Marketing Corporation