

# THE GLOBAL MULTIPLE BEVERAGE MARKETPLACE

2017 EDITION (Published January 2018. Data through 2016. Market projections through 2021.) More than 300 pages, with extensive text analysis, graphs, charts and tables.

This research report from Beverage Marketing Corporation offers worldwide and country trends. It includes volume, growth and per capita consumption statistics for eleven major beverage categories. Each category is considered in its own chapter as well as in the context of the overall marketplace. Developments by beverage type and country round out the coverage provided in this comprehensive international report.

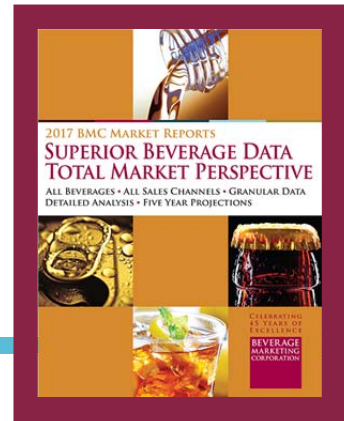
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HAVE  
QUESTIONS?

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## THE ANSWERS YOU NEED

Put the world into perspective with this research study that looks at international alcohol and non-alcohol beverage trends across key 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' 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 2021?

## THIS MULTIPLE BEVERAGE INDUSTRY REPORT FEATURES

This multiple beverage industry report features a comprehensive overview of the international beverage marketplace and 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.
- Analysis of the forces determining each category's future are also included in this international market report.

# The Global Multiple Beverage Marketplace

January 2018

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RESEARCH • DATA • CONSULTING

**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 2016. 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 2016, Australia was the 28<sup>th</sup> largest brewing nation, behind 27<sup>th</sup>-place Romania. Viet Nam, Nigeria, Ukraine, South Korea and Thailand ranked among the top 20 in 2016.
- The countries that make a lot of beer generally consume proportionally large amounts as well. For example, the nine of 10 largest beer-producing countries also ranked among the 10 biggest consuming countries. (Poland ranked 10<sup>th</sup> in output but 11<sup>th</sup> in intake, behind Spain. Viet Nam ranked eighth in consumption but ninth in production; the United Kingdom stood eighth in production but ninth in consumption. Mexico was fourth in output, sixth in consumption.)

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 2016 were located in Europe.

Exhibit 1.3

**GLOBAL BEVERAGE MARKET**  
**CHANGE IN VOLUME BY CATEGORY (r)**  
**2012 – 2016**

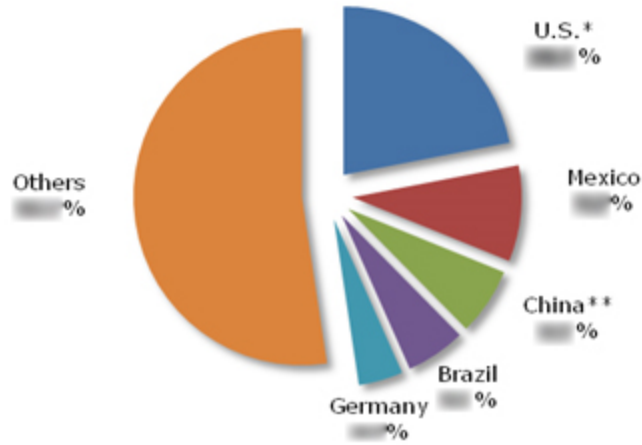
<b>Category</b>	<b>2011/12</b>	<b>2012/13</b>	<b>2013/14</b>	<b>2014/15</b>	<b>2015/16</b>
Beer	100%	100%	100%	100%	100%
Bottled Water	100%	100%	100%	100%	100%
Carbonated Soft Drinks	100%	100%	100%	100%	100%
Coffee	100%	100%	100%	100%	100%
Distilled Spirits	100%	100%	100%	100%	100%
Energy Drinks	100%	100%	100%	100%	100%
Fruit Beverages	100%	100%	100%	100%	100%
Milk	100%	100%	100%	100%	100%
Sports Beverages	100%	100%	100%	100%	100%
Tea	100%	100%	100%	100%	100%
Wine	100%	100%	100%	100%	100%
<b>Subtotal</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Others*	100%	100%	100%	100%	100%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

(r) Revised

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

Source: Beverage Marketing Corporation

**FIVE COUNTRIES CONSUME NEARLY 50% OF CSDS**  
*Shares of global soft drink volume by leading countries, 2016*



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

\*\* Includes Taiwan.

Source: Beverage Marketing Corporation