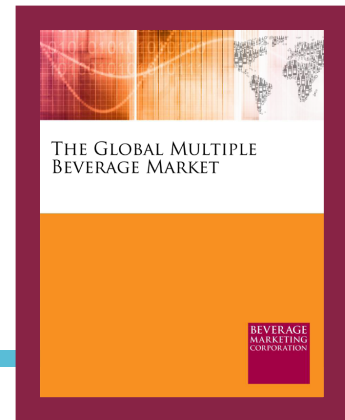


THE GLOBAL MULTIPLE BEVERAGE MARKET

2020 EDITION (Published December 2020. Data through 2019. Market projections through 2024.) Excel tables plus an executive summary.



This research report offers worldwide and country beverage data. It includes volume, growth and per capita consumption statistics for eleven major beverage categories. Developments by beverage type and country round out the coverage provided in this comprehensive international report. Data is augmented by an overview of key developments in the global beverage industry including discussion of the impact of the coronavirus pandemic.

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HAVE QUESTIONS?

Contact Charlene Harvey: 212-688-7640 x 1962
charvey@beveragemarketing.com

**BEVERAGE
MARKETING
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BEVERAGE MARKETING CORPORATION
850 Third Avenue, 13th Floor, New York, NY 10022
Tel: 212-688-7640 Fax: 212-826-1255

THE ANSWERS YOU NEED

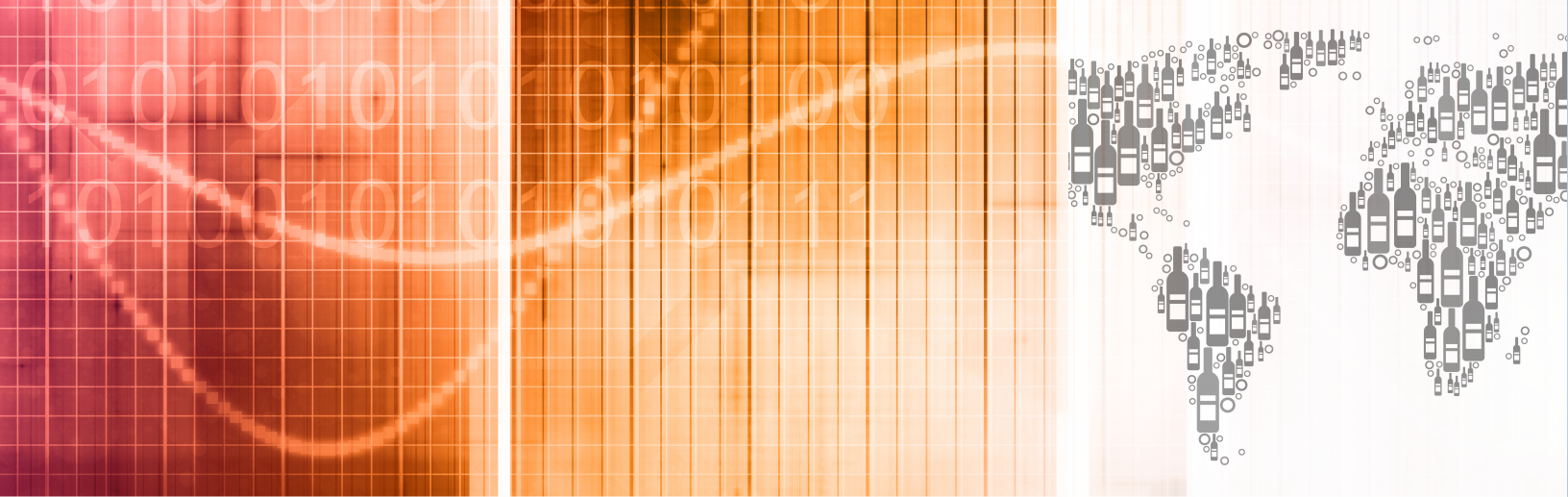
Put the world into perspective with this research study that looks at international alcohol and non-alcohol beverages across key sectors. Questions answered include:

- 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?
- 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 2024?

THIS MULTIPLE BEVERAGE INDUSTRY REPORT FEATURES

This multiple beverage industry report features a comprehensive overview of the international beverage marketplace and includes:

- A bird's eye view of the commercial beverage industry as a whole, including an executive summary describing key developments.
- A break-down of the industry down by volume by beverage category, including per capita consumption figures.
- 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 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 sector.



THE GLOBAL MULTIPLE BEVERAGE MARKET

**BEVERAGE
MARKETING
CORPORATION**

The Global Multiple Beverage Market

December 2020



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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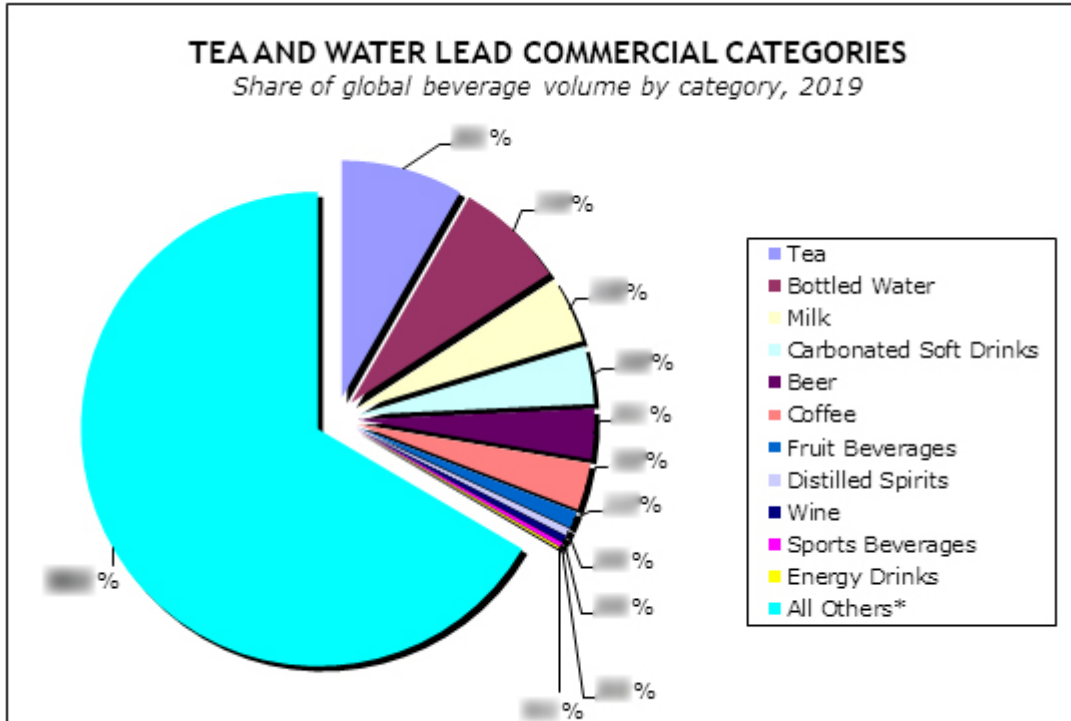
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Tea, a beverage with deep roots in the world's two most populous countries as well as its variety of flavors and health benefits that make it appealing to consumers around the world, ranked as the number-one beverage by volume in 2019. Bottled water surpassed milk, a staple around the globe, to become the number-two category by volume several years earlier and remained second in 2019. However, the quantity of tea, packaged water and milk consumed remained far less than the amount of non-packaged water, which accounts for the bulk of humans' liquid consumption. Yet packaged water was the third fastest growing major beverage category. (Only the comparatively tiny energy drink and sports beverage categories moved faster.) With the exception of beer, which fell roughly in the middle of the list of the 11 major categories, alcoholic beverages rank low in terms of consumption, followed by sports beverages in the 10th position and energy drinks the 11th.

- With the equivalent of 4.7 billion hectoliters (123.1 billion gallons), tea led the field with approximately 8.3% of all the liquid consumed by human beings around the world during 2019.
- Bottled water first surpassed the 1-billion-hectoliter mark in 2000 on growth of nearly 10%, and it maintained strong if slightly slower growth in several subsequent years. By 2019, its volume surpassed 4.2 billion hectoliters. The category's share of total liquid consumption volume increased from 5.9% in 2014 to 7.5% in 2019, which put its percentage of total beverage volume 3.0 points higher than milk's market share.
- Consequently, milk stood in third place with a 4.5% share.
- The total amount of cow milk produced in any given year greatly exceeds the volume of tea brewed, but of course not all milk is distributed in liquid form.
- Moreover, significant but immeasurable quantities of fluid milk are used in non-beverage form, which even before being surpassed by bottled water complicated its claims to number-two status.
- In 2019, CSD volume inched very slightly upward. It was hampered by lackluster performance in its largest market. CSDs lagged forcefully growing beverage categories like bottled water and energy drinks but outperformed beverage alcohol as well as fruit beverages and milk. CSDs accounted for 3.9% of global beverage consumption, only a bit smaller than the share they had five years earlier.
- While CSDs remain popular, and in some markets are the largest commercial beverage category, they have faced an array of challenges, from contamination scares in India to concerns about their impact on consumers' waistlines.

TEA AND WATER LEAD COMMERCIAL CATEGORIES
Share of global beverage volume by category, 2019



* Includes all other beverages, commercial and non-commercial, such as tap water.
 Source: Beverage Marketing Corporation

Exhibit 1.2

GLOBAL BEVERAGE MARKET
SHARE OF CONSUMPTION VOLUME BY CATEGORY (r)
2014 – 2019

Category	2014	2015	2016	2017	2018	2019
Beer	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%
Bottled Water	18.5%	18.5%	18.5%	18.5%	18.5%	18.5%
Carbonated Soft Drinks	22.5%	22.5%	22.5%	22.5%	22.5%	22.5%
Coffee	4.5%	4.5%	4.5%	4.5%	4.5%	4.5%
Distilled Spirits	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
Energy Drinks	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
Fruit Beverages	2.5%	2.5%	2.5%	2.5%	2.5%	2.5%
Milk	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%
Sports Beverages	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
Tea	10.5%	10.5%	10.5%	10.5%	10.5%	10.5%
Wine	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
Subtotal	85.5%	85.5%	85.5%	85.5%	85.5%	85.5%
All Others*	14.5%	14.5%	14.5%	14.5%	14.5%	14.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

(r) Revised
 * Includes all beverages, commercial and non-commercial, such as tap water.
 Source: Beverage Marketing Corporation