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

First Global Bottled Water Congress
4-6 October 2004
Evian les Bains, France

Second Global Bottled Water Congress
20-22 September 2005
Rome, northern Italy

Third Global Bottled Water Congress
20-22 September 2005
Dubai

4th Global Bottled Water Congress
12-14 September 2007
Mexico City

5th Global Bottled Water Congress
27-29 September 2009
Winchester, near Farnham

6th Global Bottled Water Congress
11-12 November 2009
Istanbul, Turkey

7th Global Bottled Water Congress
1-3 November 2010
Glasgow, Edinburgh, Scotland

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

### 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
- Still to 10 litres: 49.4%
- Still bulk over 10 litres: 33.6%
- Sparkling: 17.0%

175 billion litres

2010
- Still to 10 litres: 34.2%
- Still bulk over 10 litres: 52.4%
- Sparkling: 13.5%

237 billion litres

Source: Zenith International
76 countries
Top 10 bottled water countries, 2009-10

Source: Zenith International
76 countries

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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

175 billion litres

2005

22.9%

16.7%

16.6%

10.3%

7.3%

Asia & Australasia

West Europe

Central & Latin America

North America

Africa & Middle East

East Europe

Source: Zenith International
76 countries

237 billion litres

2010

30.6%

19.9%

15.9%

14.5%

12.0%

7.2%

Asia & Australasia

West Europe

Central & Latin America

North America

Africa & Middle East

East Europe

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Latin America bottled water volume, 2005-10

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume (000 million litres)</th>
<th>Growth Rate</th>
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</thead>
<tbody>
<tr>
<td>2005</td>
<td>29.3</td>
<td>+5.5%</td>
</tr>
<tr>
<td>2006</td>
<td>30.9</td>
<td>+5.2%</td>
</tr>
<tr>
<td>2007</td>
<td>32.5</td>
<td>+5.4%</td>
</tr>
<tr>
<td>2008</td>
<td>34.1</td>
<td>+4.7%</td>
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<tr>
<td>2009</td>
<td>35.6</td>
<td>+4.3%</td>
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<tr>
<td>2010</td>
<td>37.6</td>
<td>+5.8%</td>
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</tbody>
</table>

Source: Zenith International
76 countries
Latin America countries by volume, 2010

Mexico 46%
Brazil 31%
Argentina 8%
Colombia 3%
Venezuela 1%
Others 11%

Total 38 billion litres

Source: Zenith International
76 countries
Brazil bottled water volume, 2005-10

000 million litres

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume (000 million litres)</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>7.7</td>
<td>+8.9%</td>
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<tr>
<td>2006</td>
<td>8.2</td>
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<td>2009</td>
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<td>+9.6%</td>
</tr>
<tr>
<td>2010</td>
<td>11.6</td>
<td>+13.3%</td>
</tr>
</tbody>
</table>

Source: Zenith International
76 countries
Brazil bottled water segments, 2010

- Still to 2 litres: 53.8%
- Sparkling: 3.8%
- Still over 10 litres: 42.4%

Total 12 billion litres

Source: Zenith International
76 countries
Global bottled water volume, 2010-15

Source: Zenith International
76 countries

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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
For more information about the Global Bottled Water Congress, please contact:
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Or visit www.zenithinternational.com/events

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