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# 2011 Global Bottled Water Congress and market trends

Richard Hall  
Chairman

Matt Wilton  
Commercial Consulting Director

Webinar  
Wednesday 13 July 2011

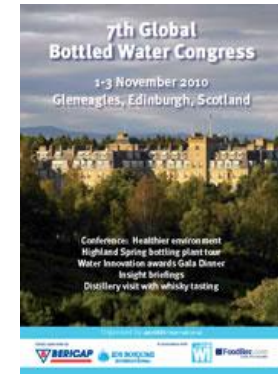
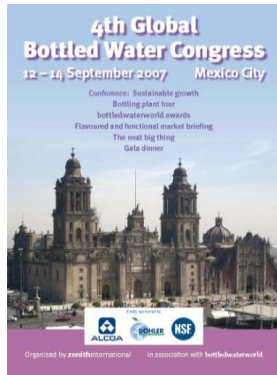
# 2011 Global Bottled Water Congress

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](http://www.zenithinternational.com/events)
- Discounted rates available until 12 August 2011

# Previous Congresses



# 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](http://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
- EcoVita
- Edson Queiroz
- Glacéau
- IDS Borjomi
- Aguas de Mondariz
- San Benedetto

## Innovators

- Cartils
- Cascadia
- Centralcer

## Other key influencers

- Aptar
- Bericap
- FoodBev
- Kantar Worldpanel
- NSF
- Rabobank

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# Global bottled water market trends

Matt Wilton

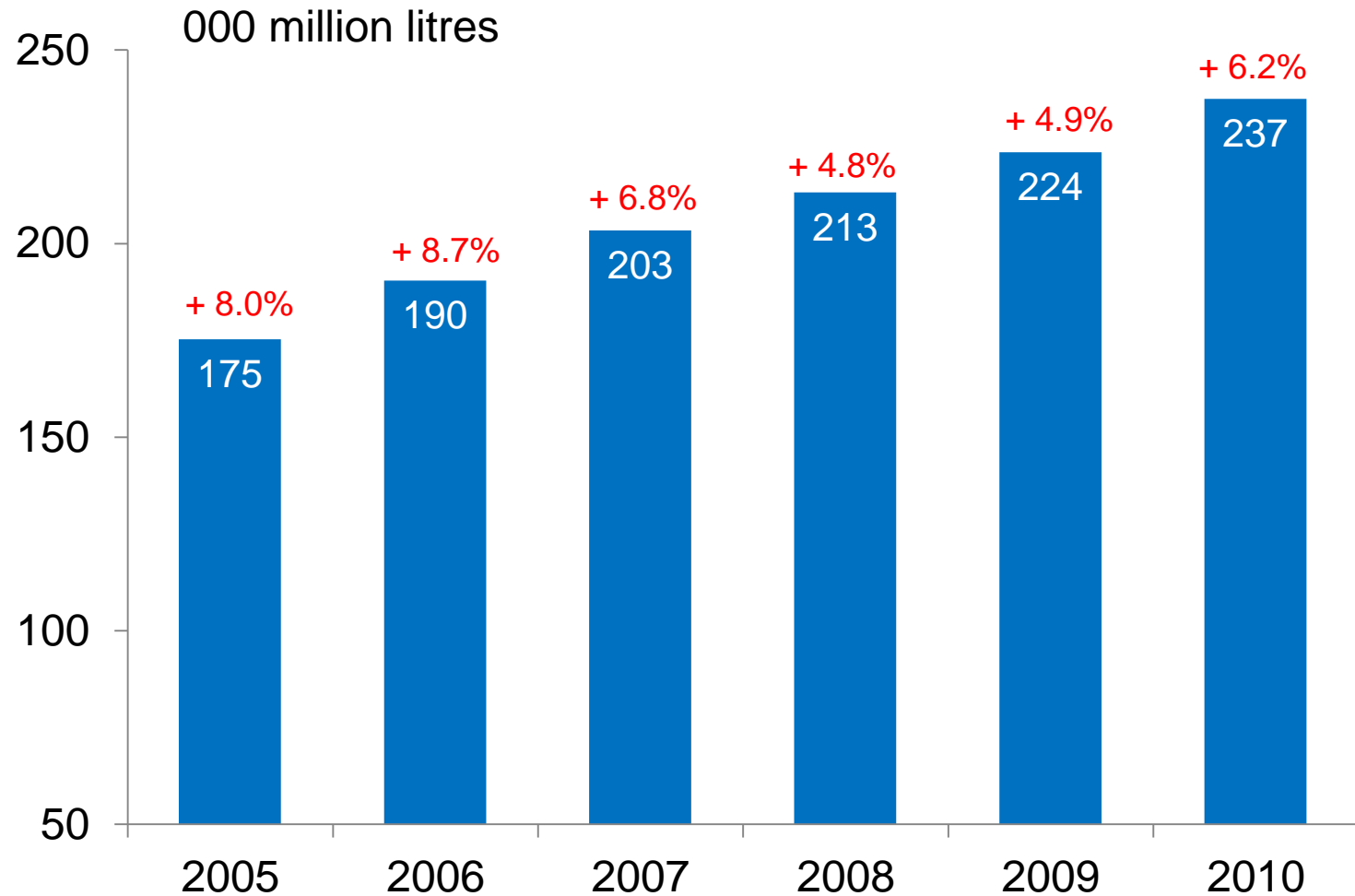
Commercial Consulting Director, Zenith International



# Global bottled water overview



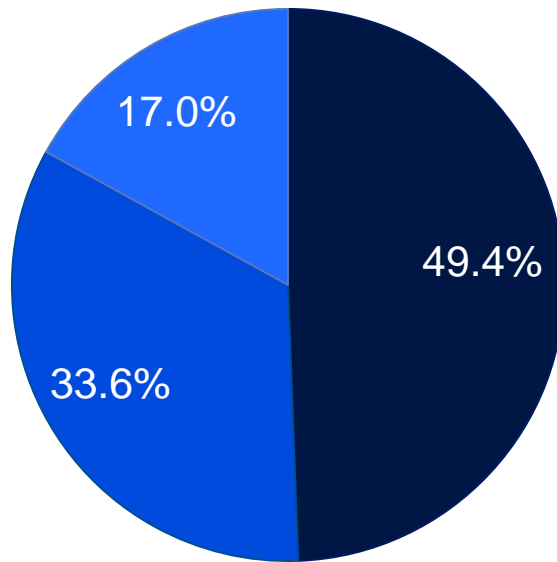
# Global bottled water volume, 2005-10



Source: Zenith International  
76 countries

# Global bottled water types, 2005-10

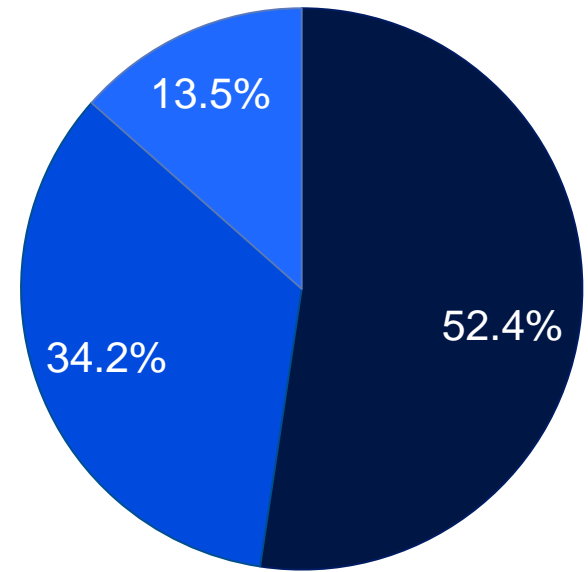
**2005**



**175 billion litres**

**2010**

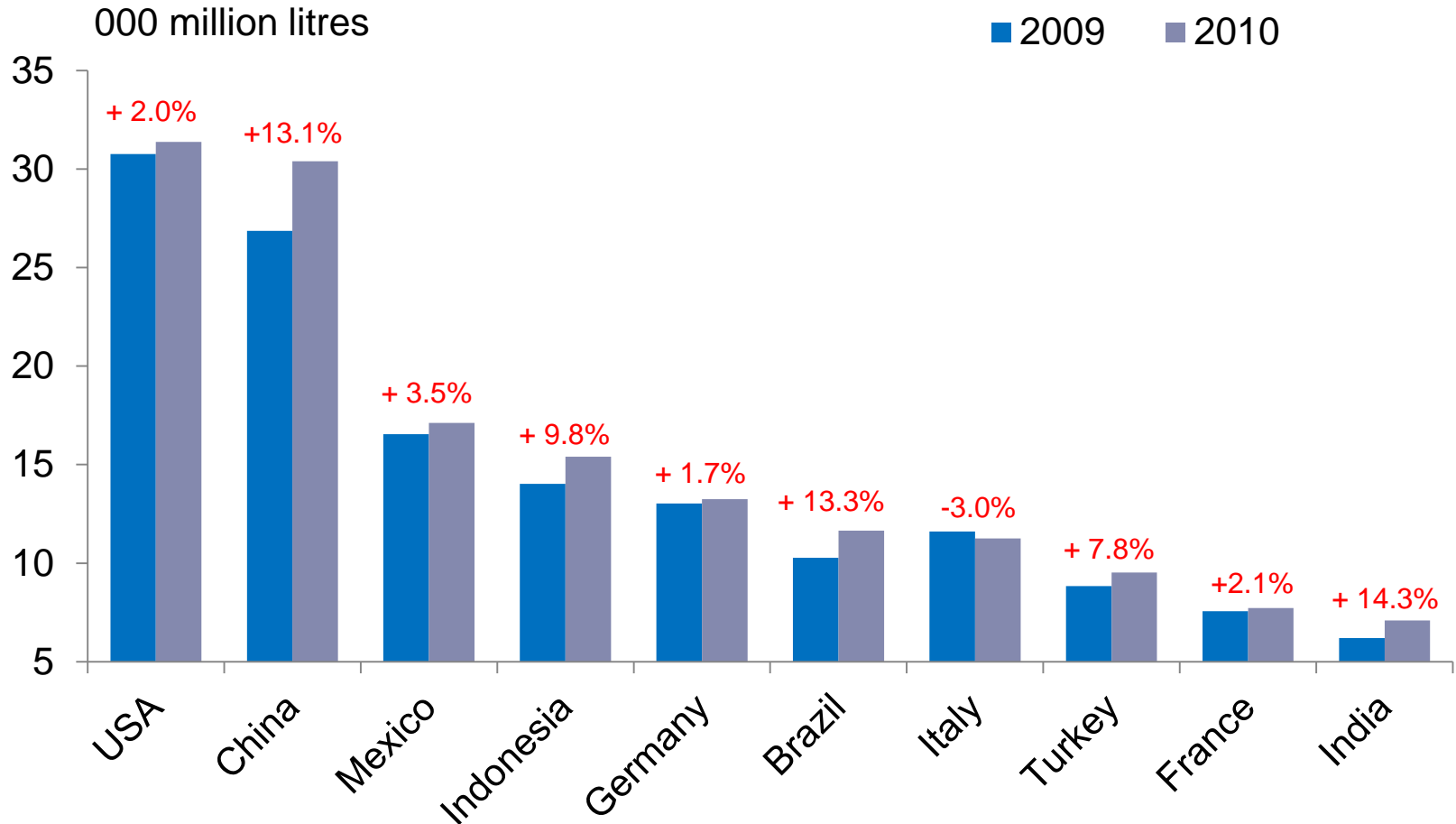
- Still to 10 litres
- Still bulk over 10 litres
- Sparkling



**237 billion litres**

Source: Zenith International  
76 countries

# Top 10 bottled water countries, 2009-10



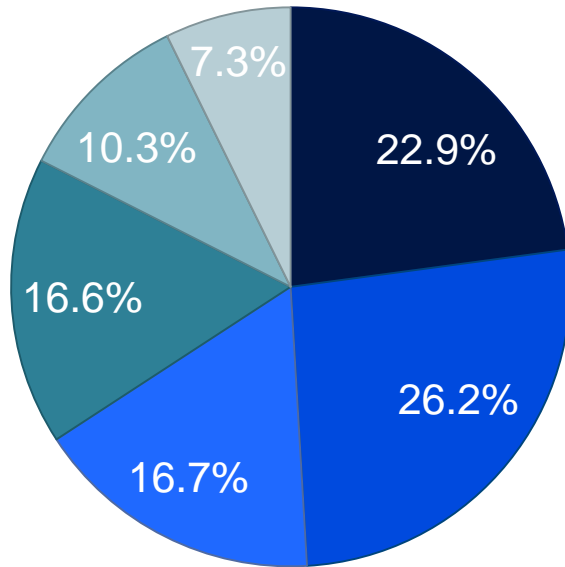
Source: Zenith International  
76 countries

# 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

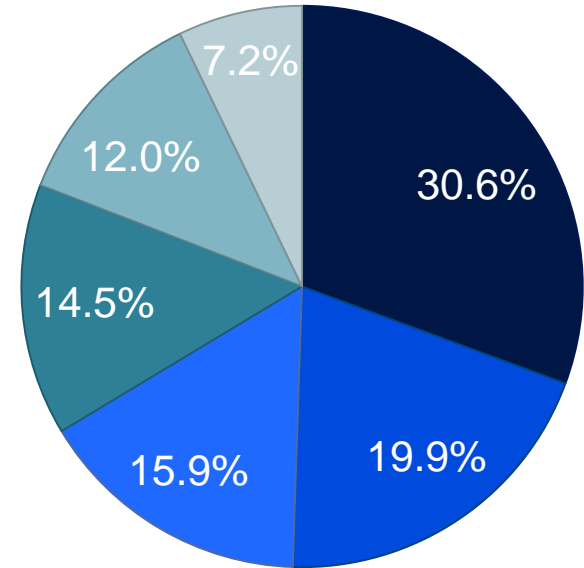
# Global bottled water regions, 2005-10

**2005**



**175 billion litres**

**2010**

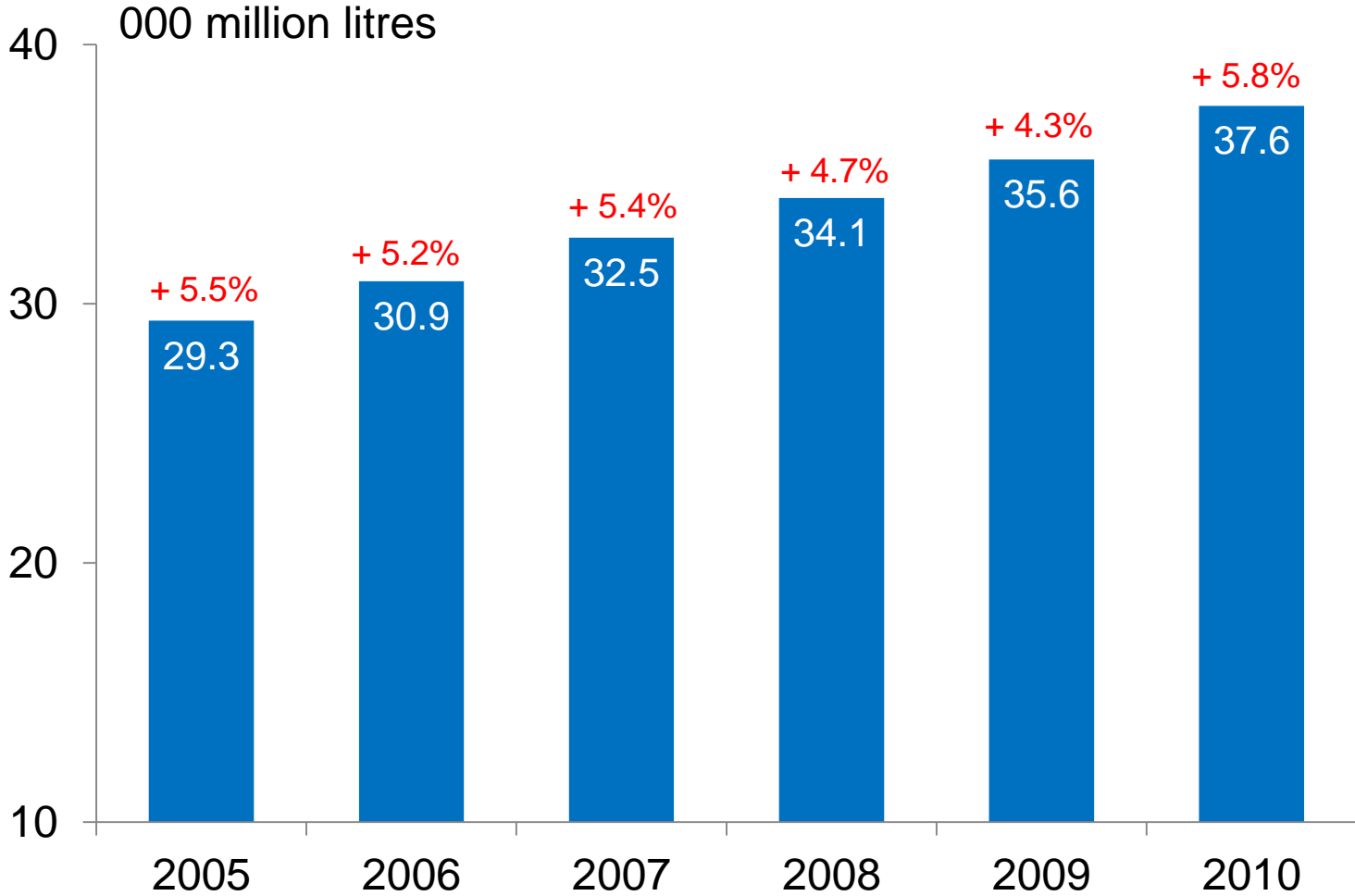


**237 billion litres**

- Asia & Australasia
- West Europe
- Central & Latin America
- North America
- Africa & Middle East
- East Europe

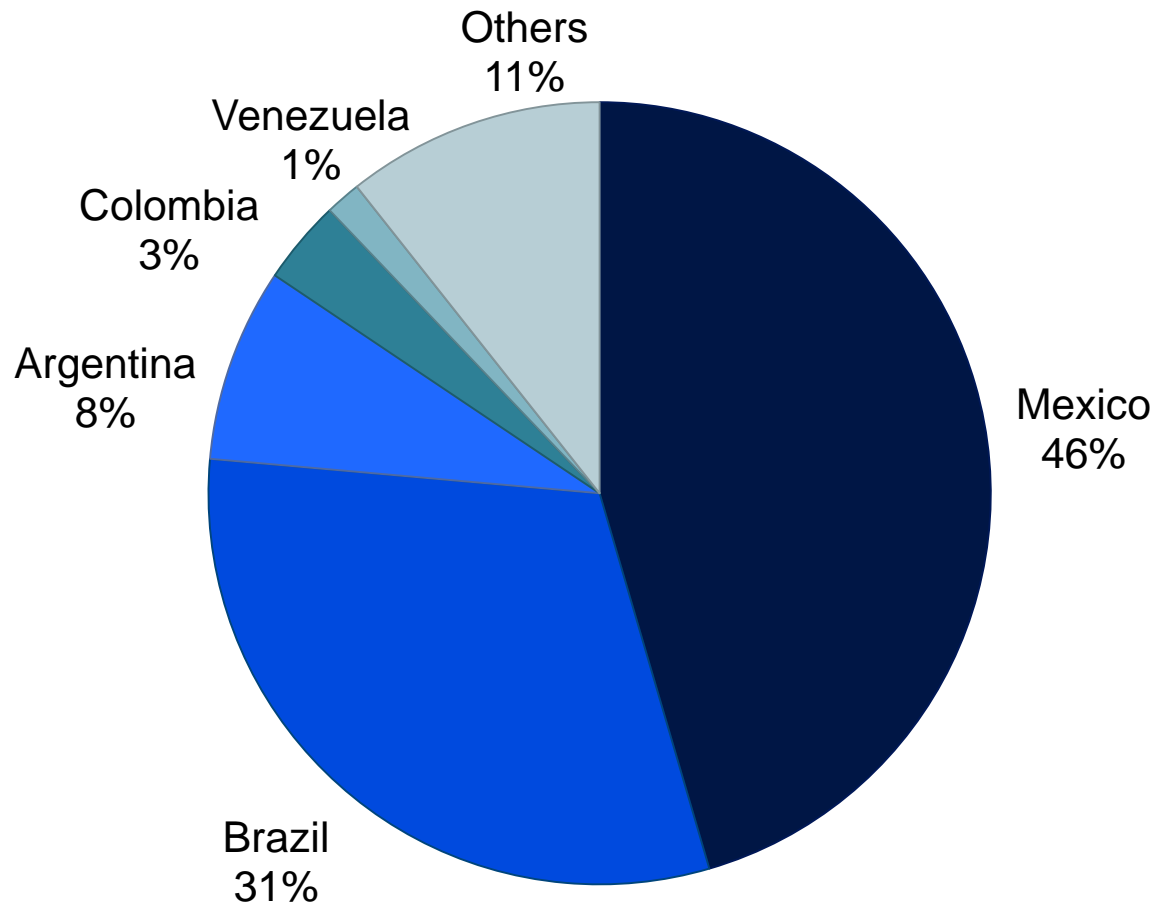
Source: Zenith International  
76 countries

# Latin America bottled water volume, 2005-10



Source: Zenith International  
76 countries

# Latin America countries by volume, 2010

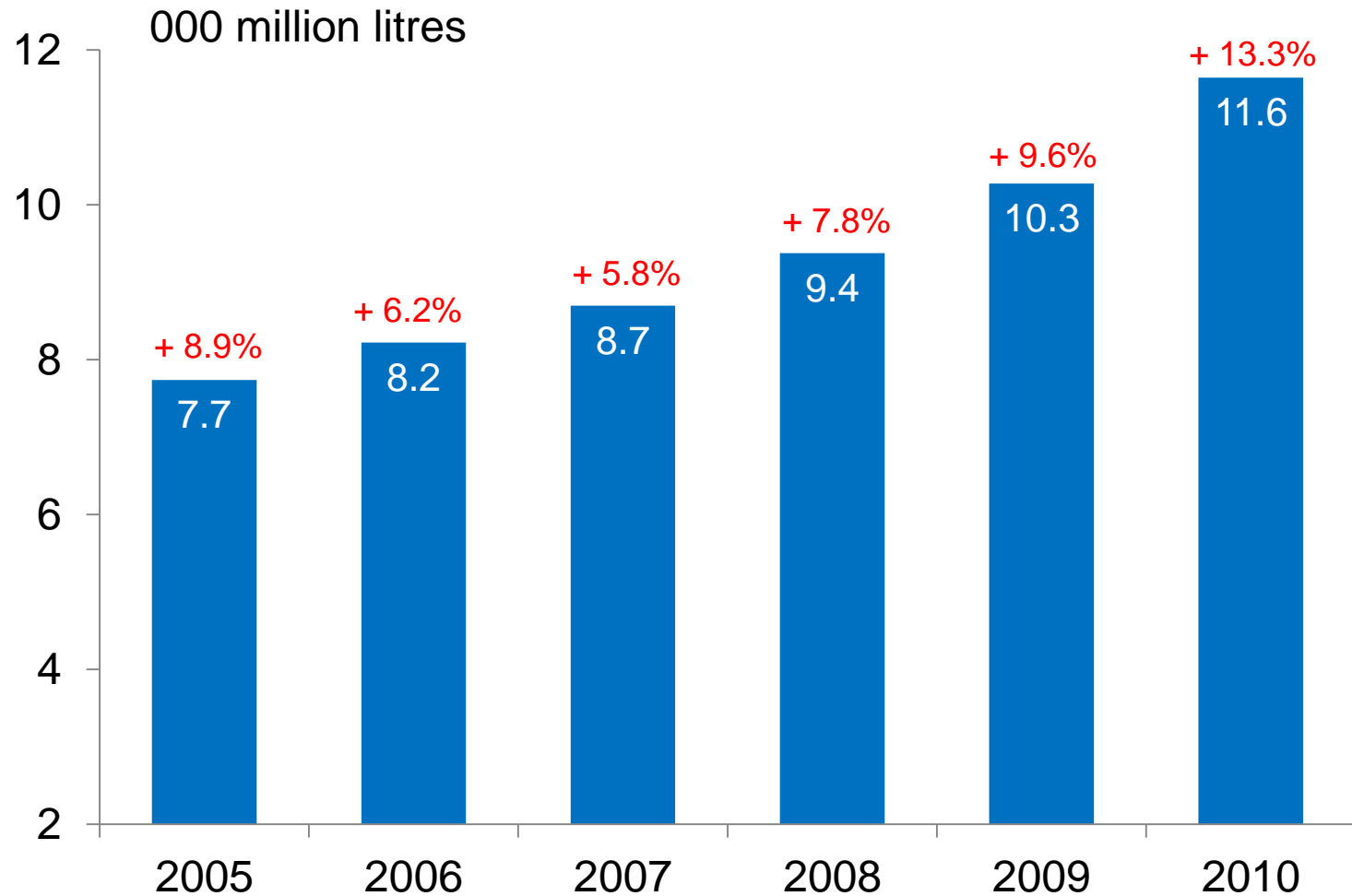


**Total 38 billion litres**

Source: Zenith International  
76 countries

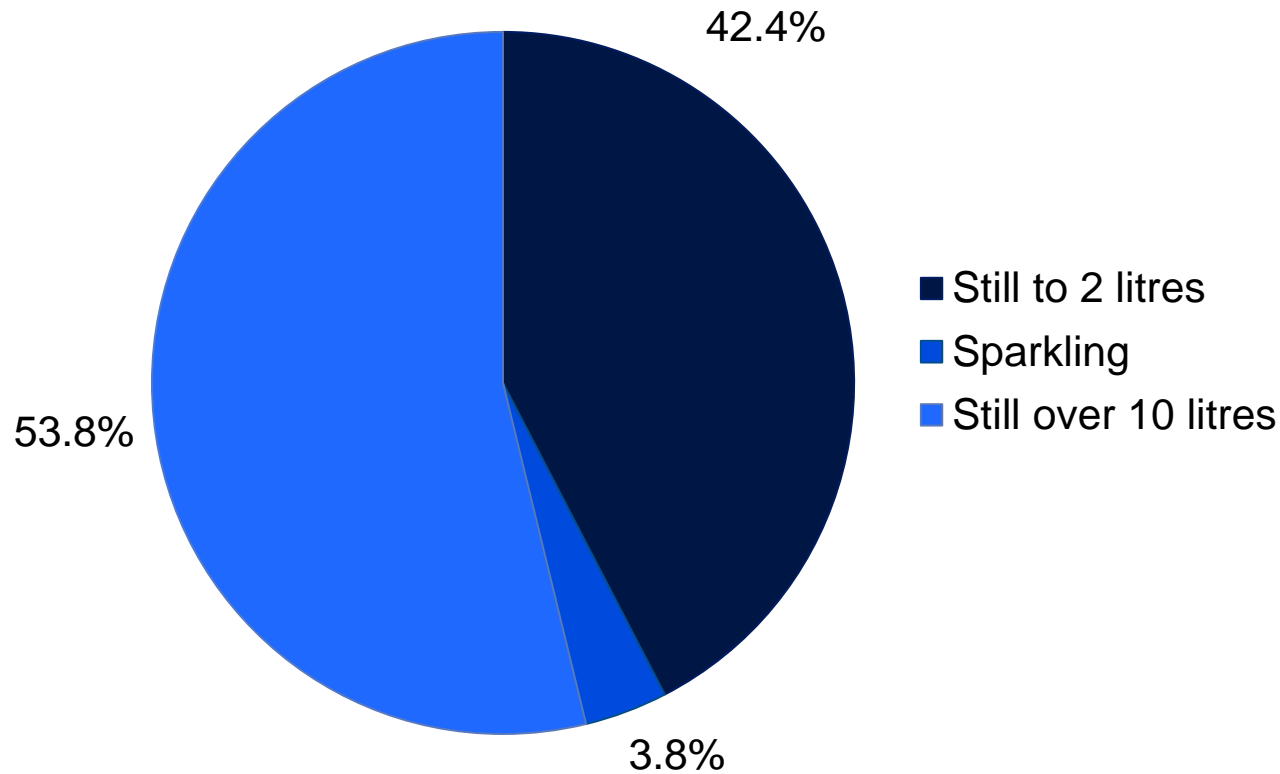


# Brazil bottled water volume, 2005-10



Source: Zenith International  
76 countries

# Brazil bottled water segments, 2010

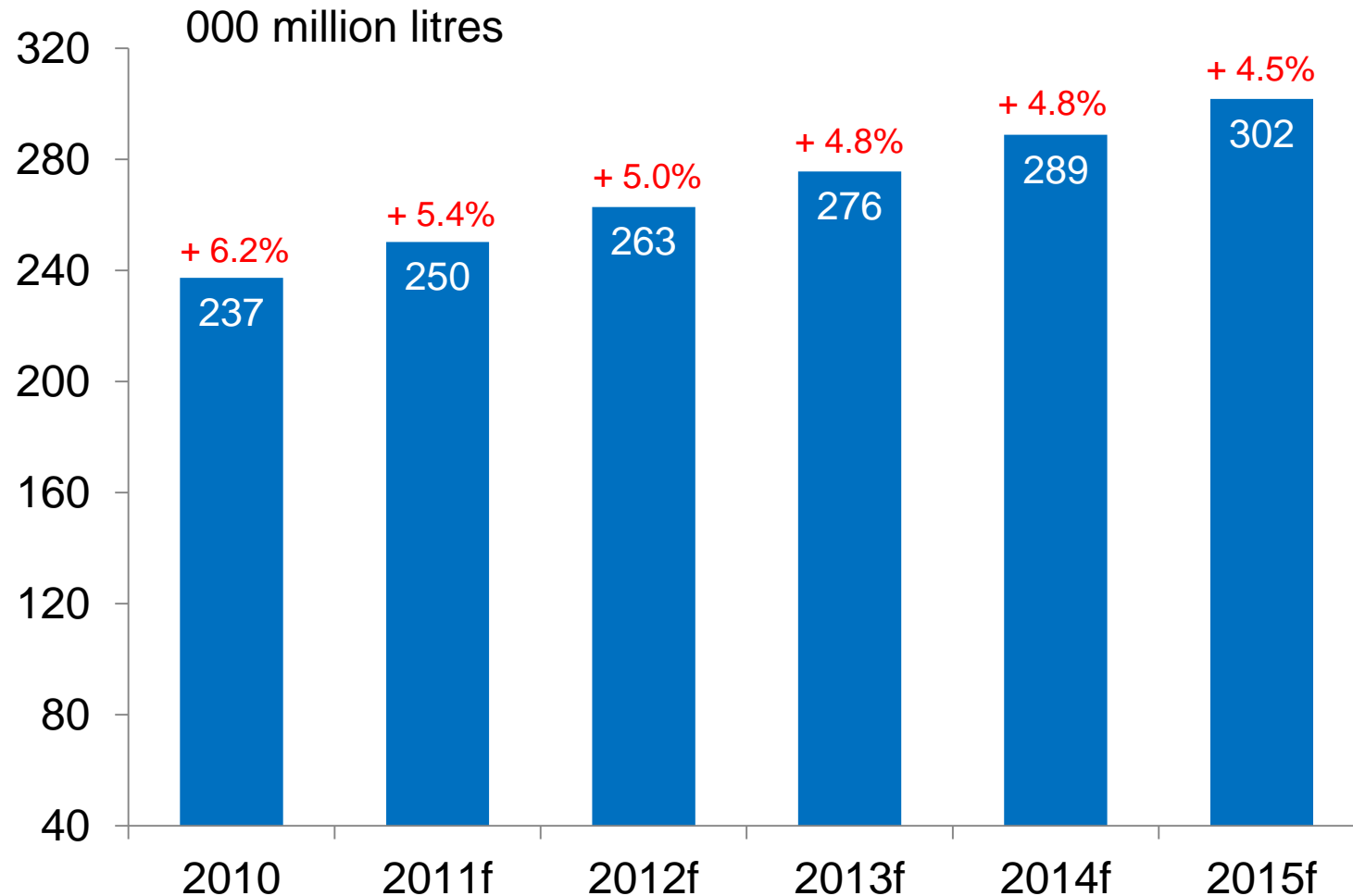


**Total 12 billion litres**



Source: Zenith International  
76 countries

# Global bottled water volume, 2010-15



Source: Zenith International  
76 countries

# 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

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For more information about the Global Bottled Water Congress, please contact:

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Or visit [www.zenithinternational.com/events](http://www.zenithinternational.com/events)

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