



European Bottled Water - Overview

Stewart Macintosh

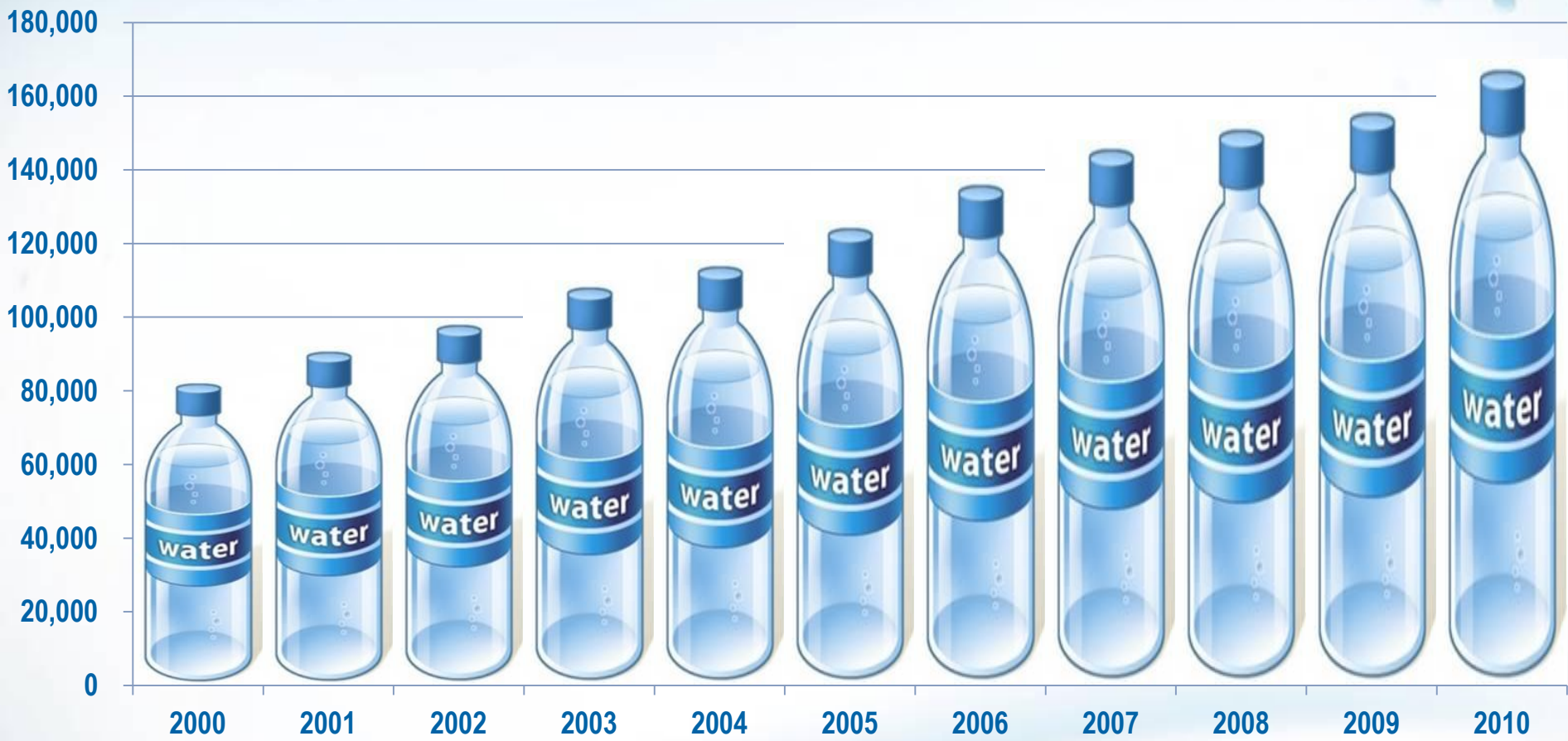
16th June 2011



The Big Picture

Global Bottled Water

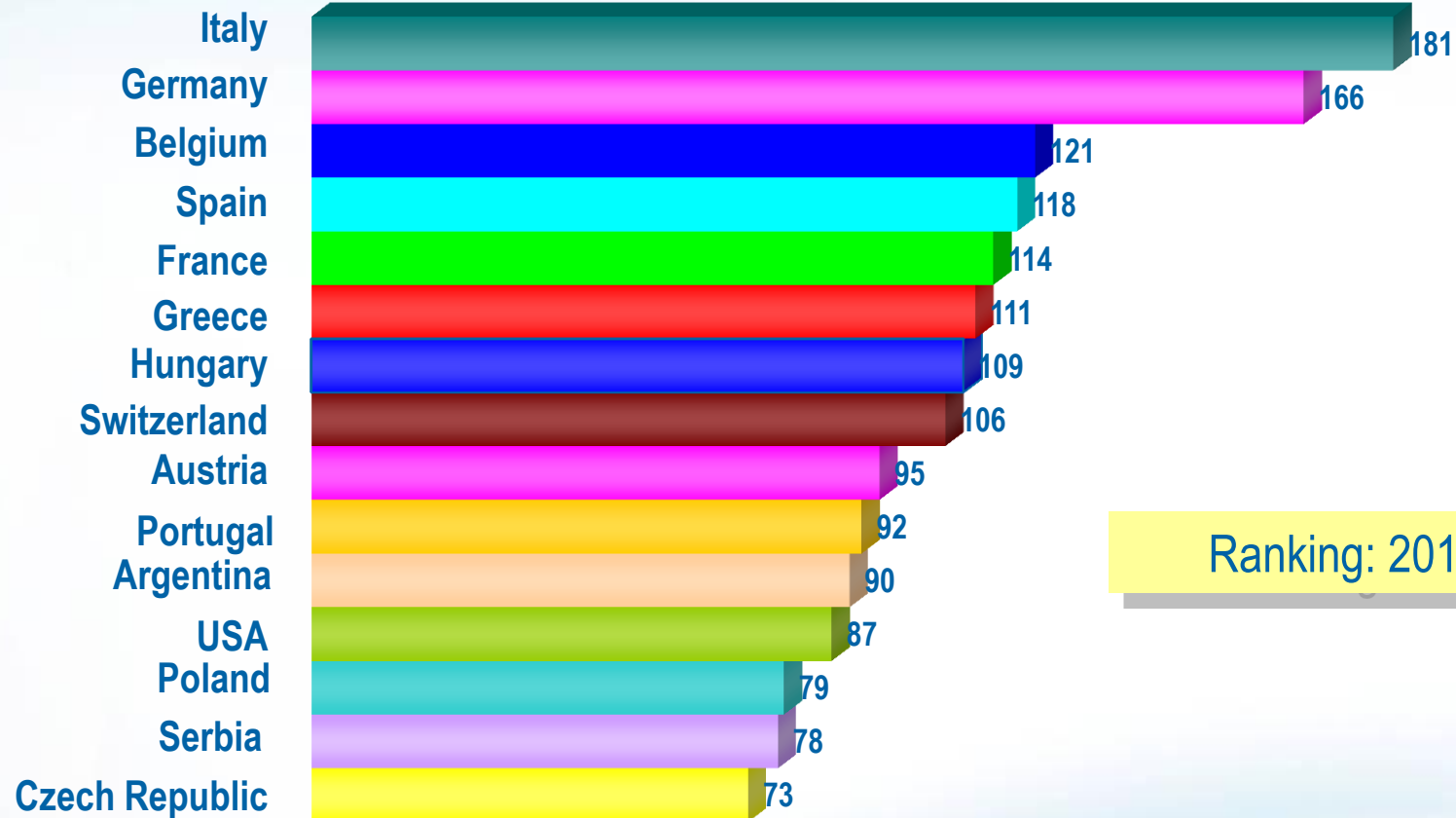
M Litres



Top 15 Bottled Water Markets Worldwide – by per capita consumption

Litres per capita

Global Total: 24.7

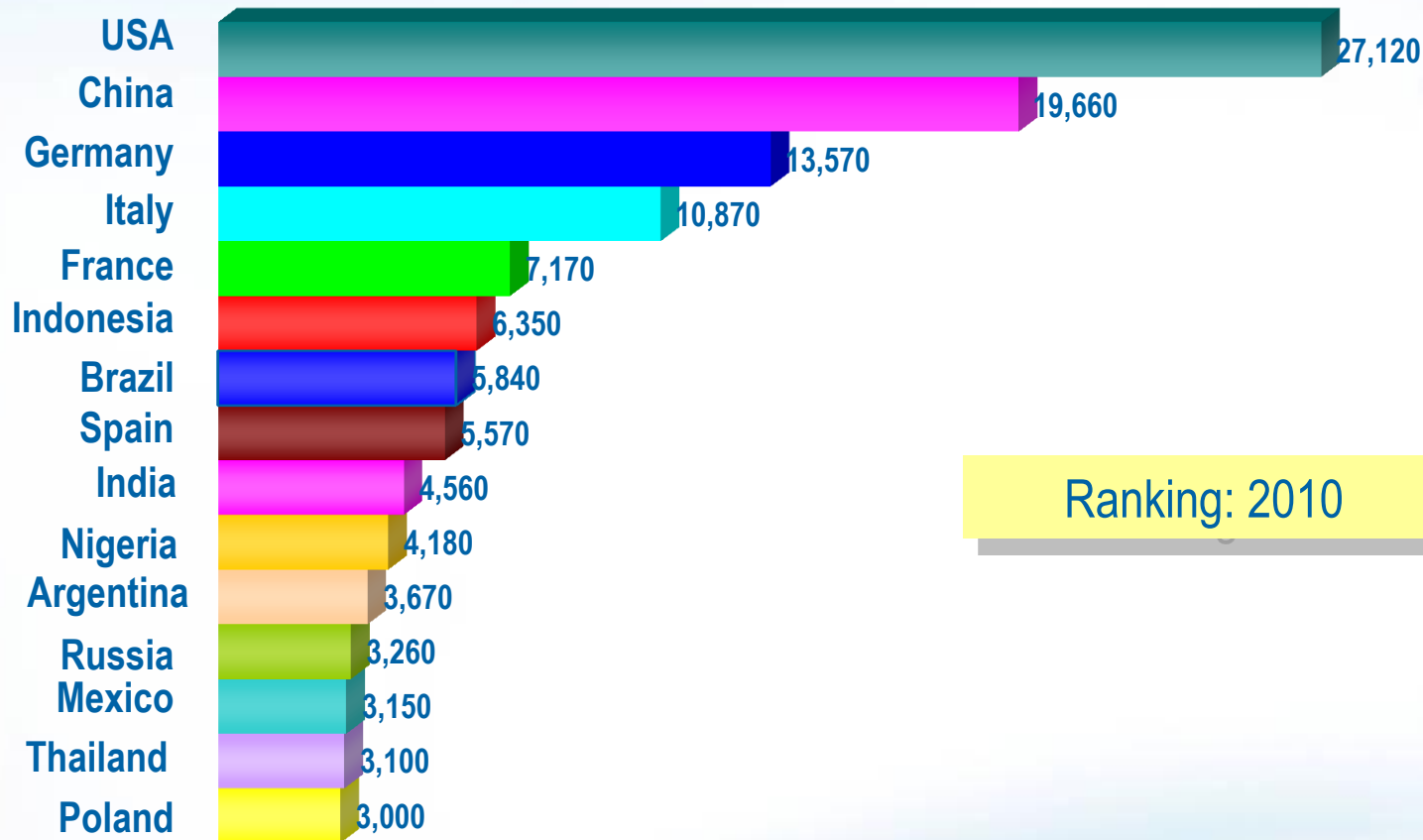


Ranking: 2010

Top 15 Bottled Water Markets Worldwide – by volume

M Litres

Global Total: 169 Billion Litres

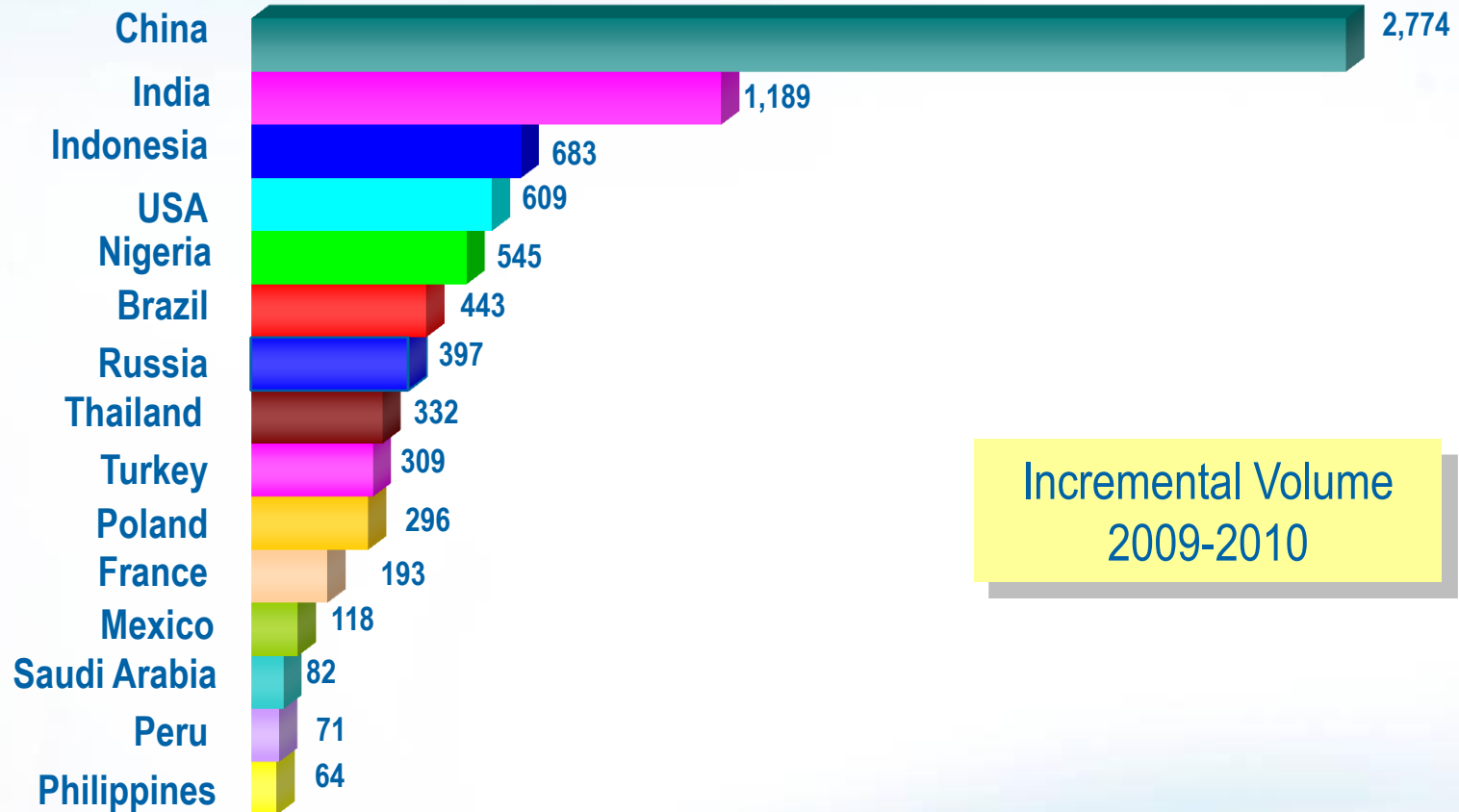


Ranking: 2010

Fastest Growing Bottled Water Markets Worldwide – by volume

M Litres

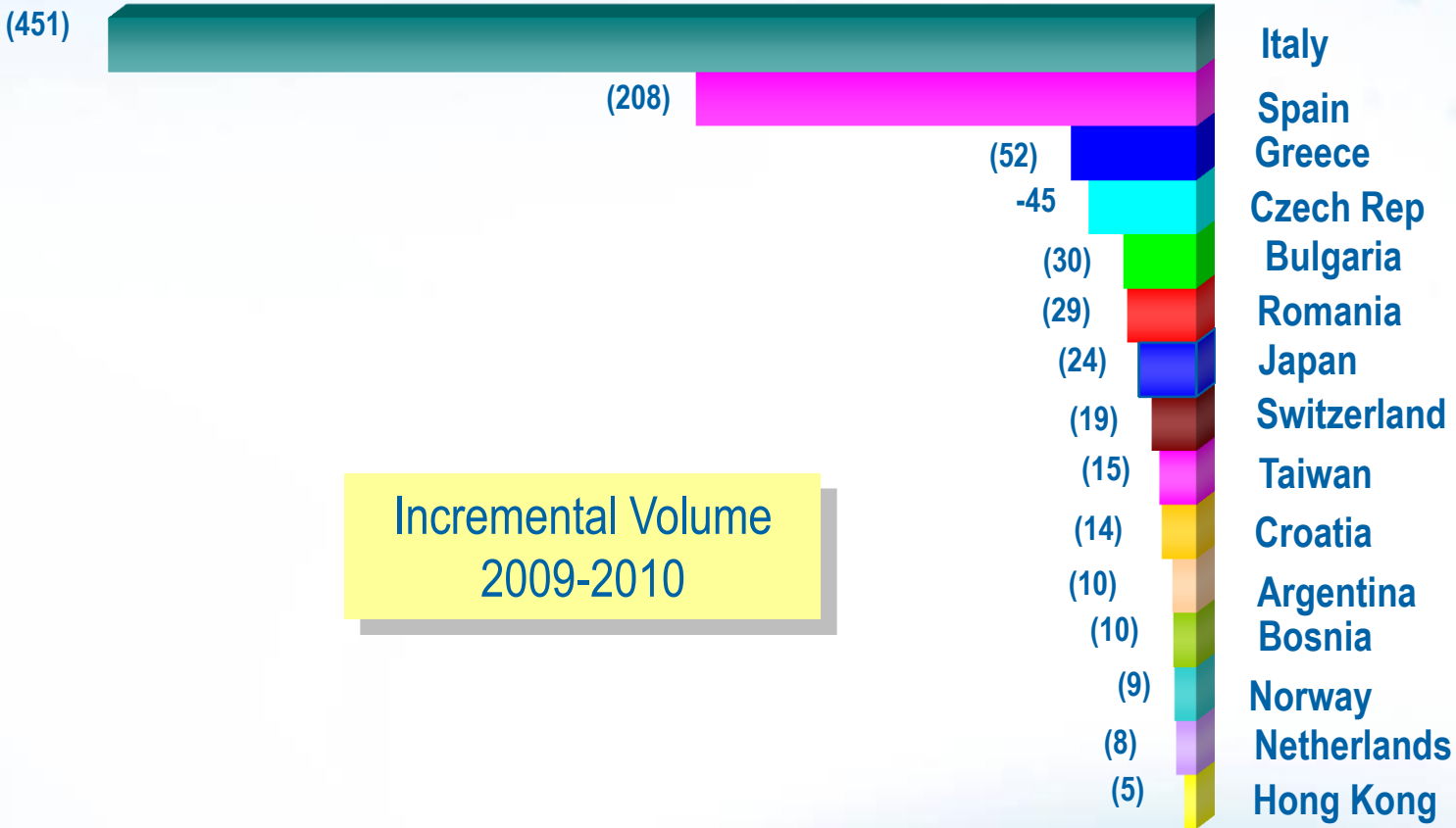
Global Growth: 9,350 M Litres



Fastest Shrinking Bottled Water Markets Worldwide – by volume

M Litres

Global Growth: 9,350 M Litres

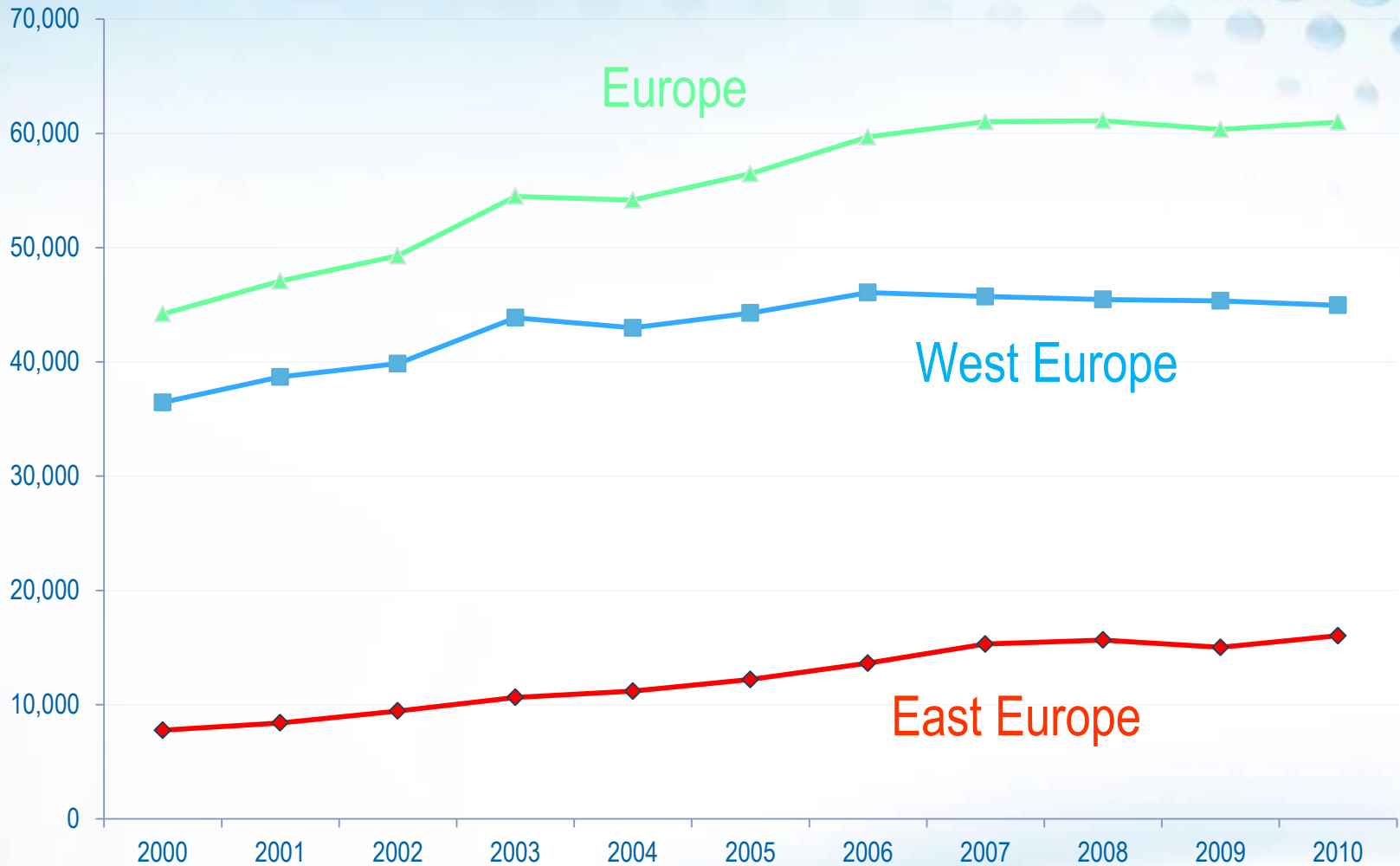


Incremental Volume
2009-2010

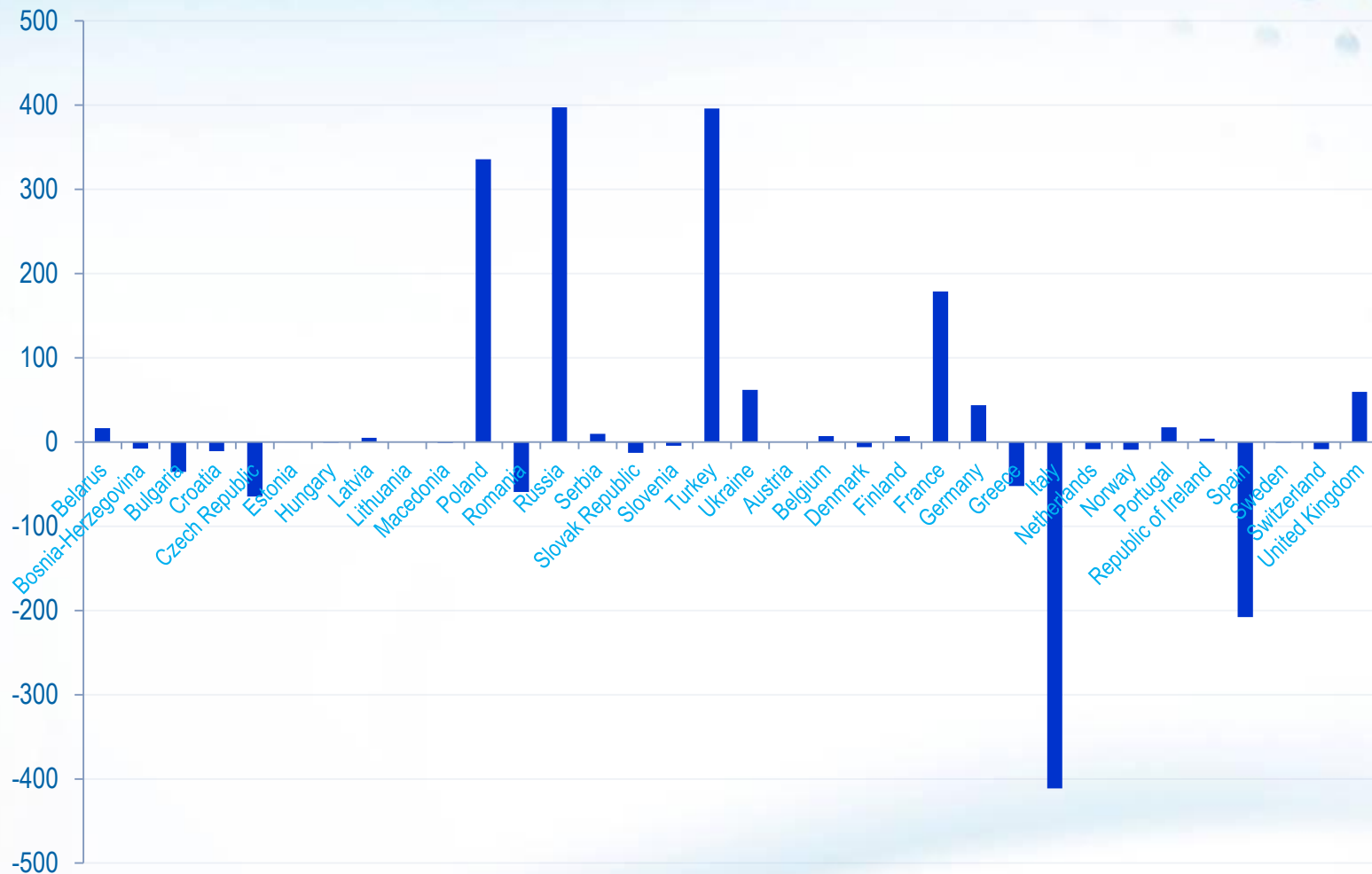


Within Europe

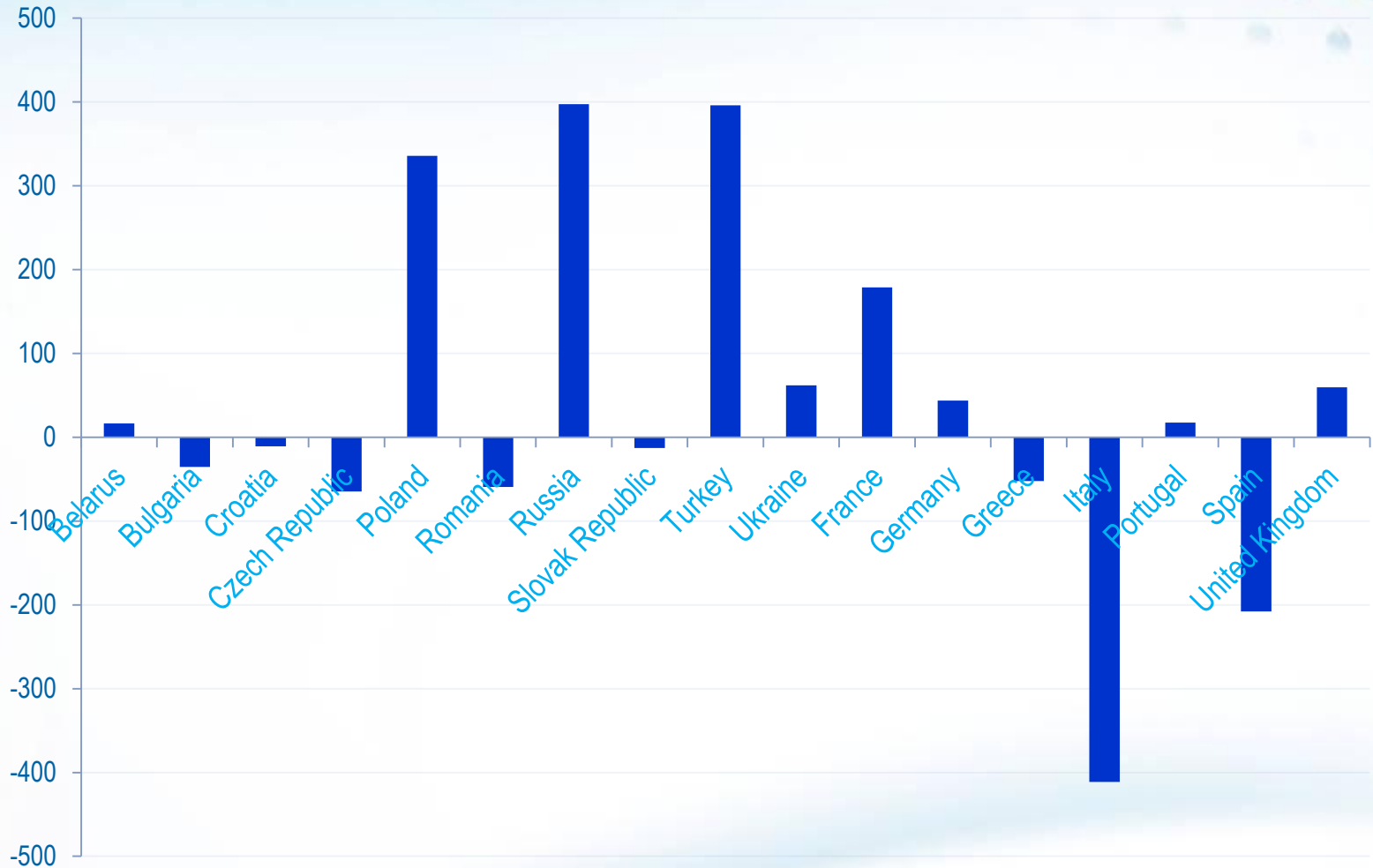
Europe – East & West



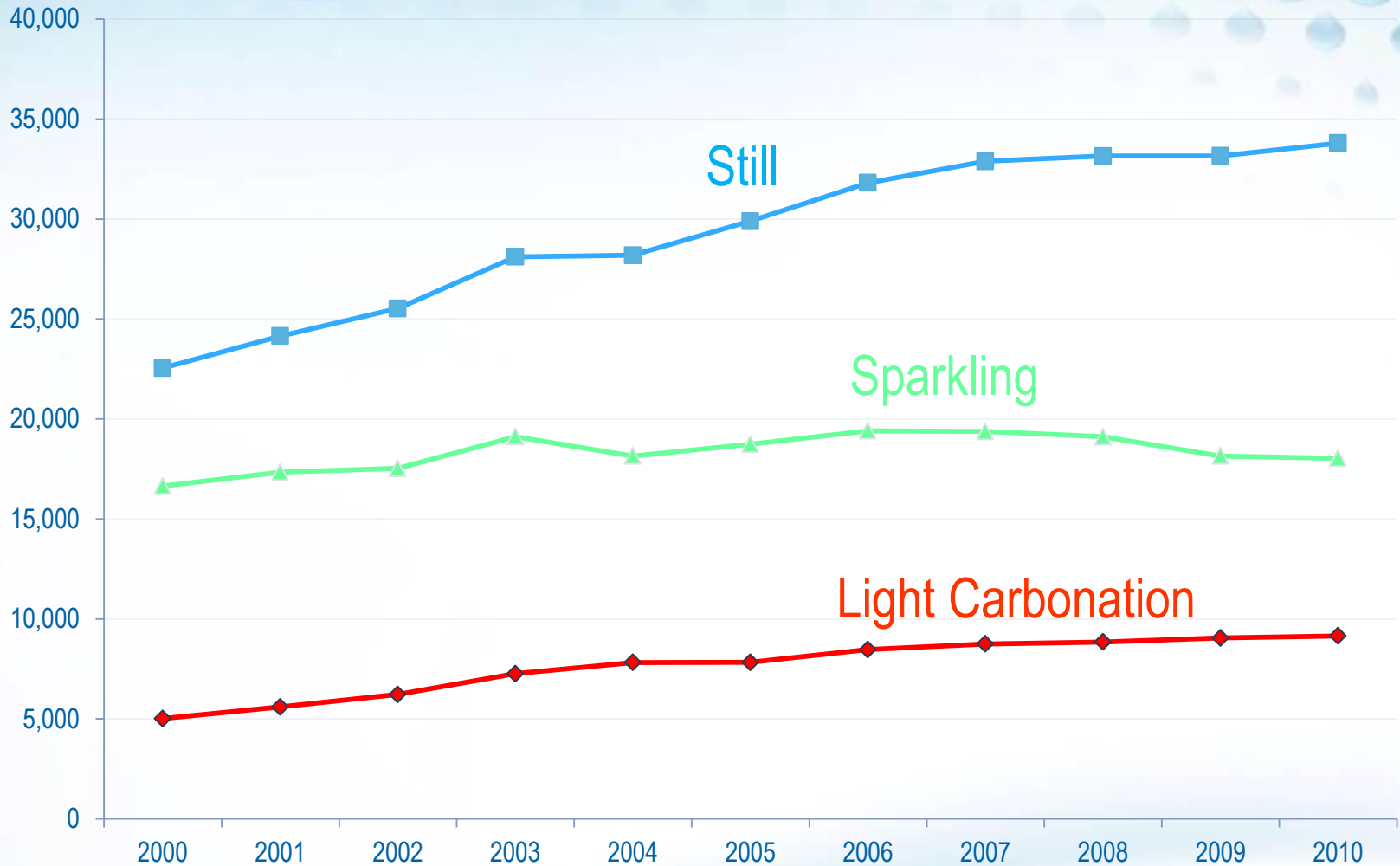
Where was the Growth ?



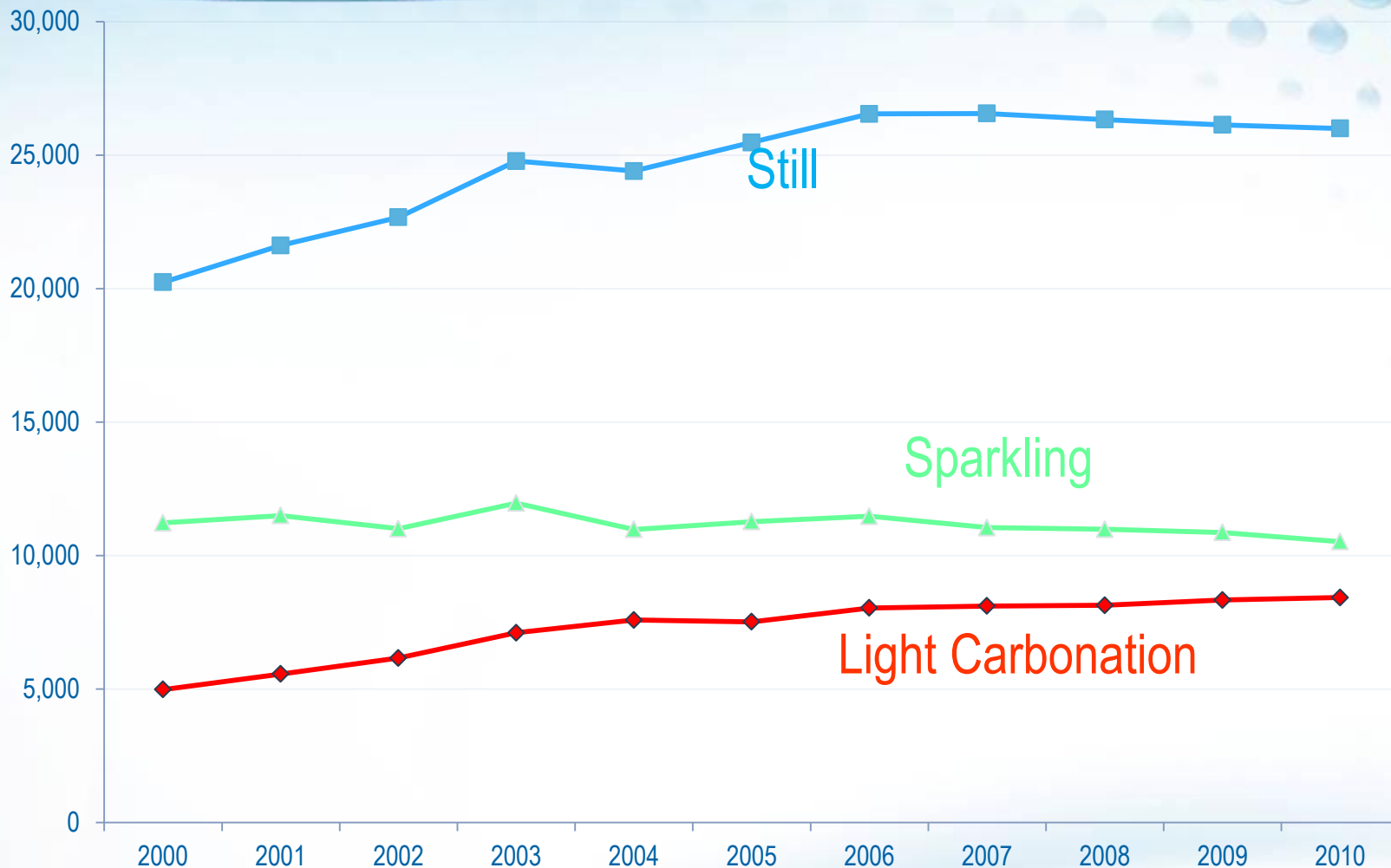
Where was the Growth ?



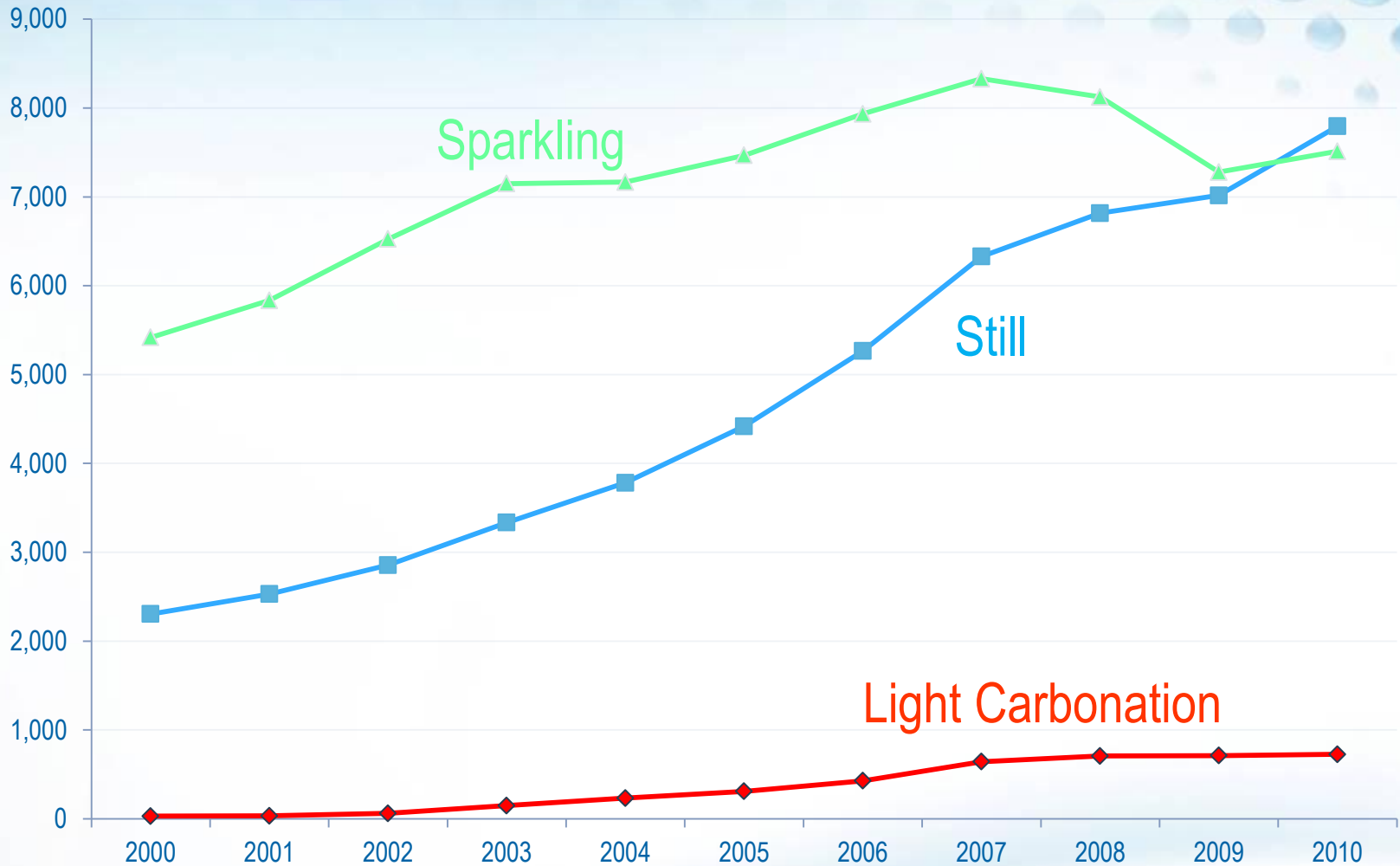
Europe - Carbonation



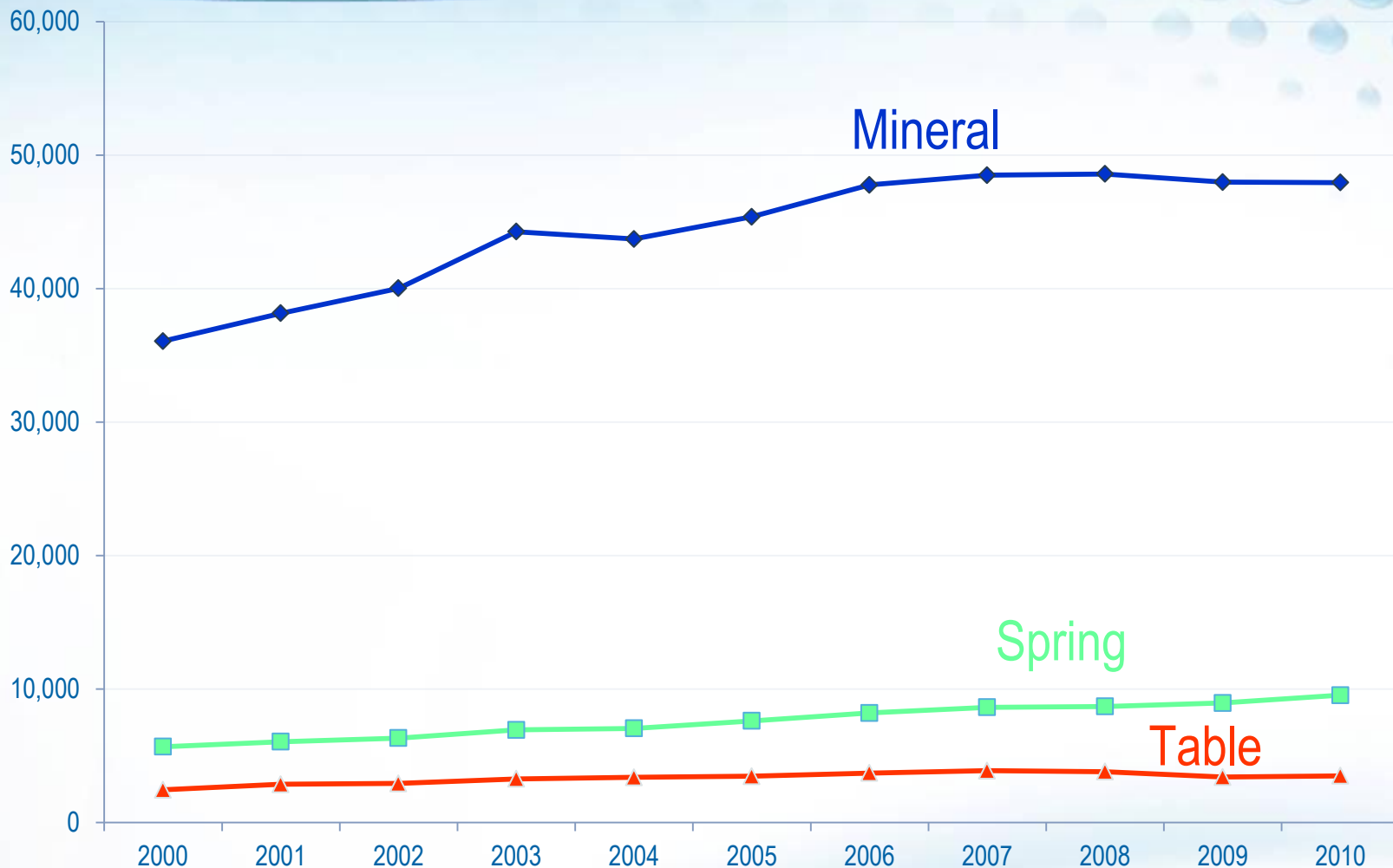
West Europe - Carbonation



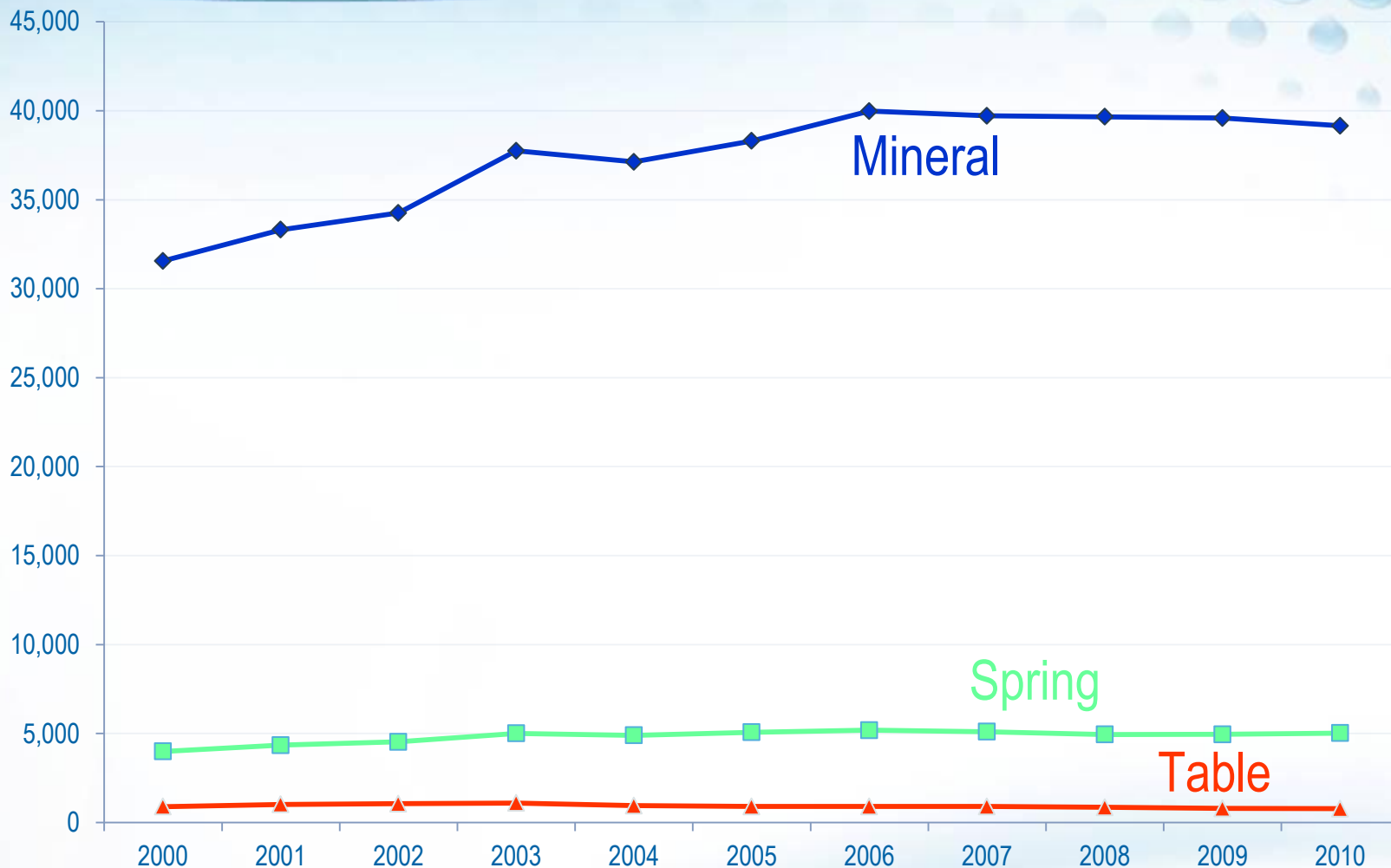
East Europe - Carbonation



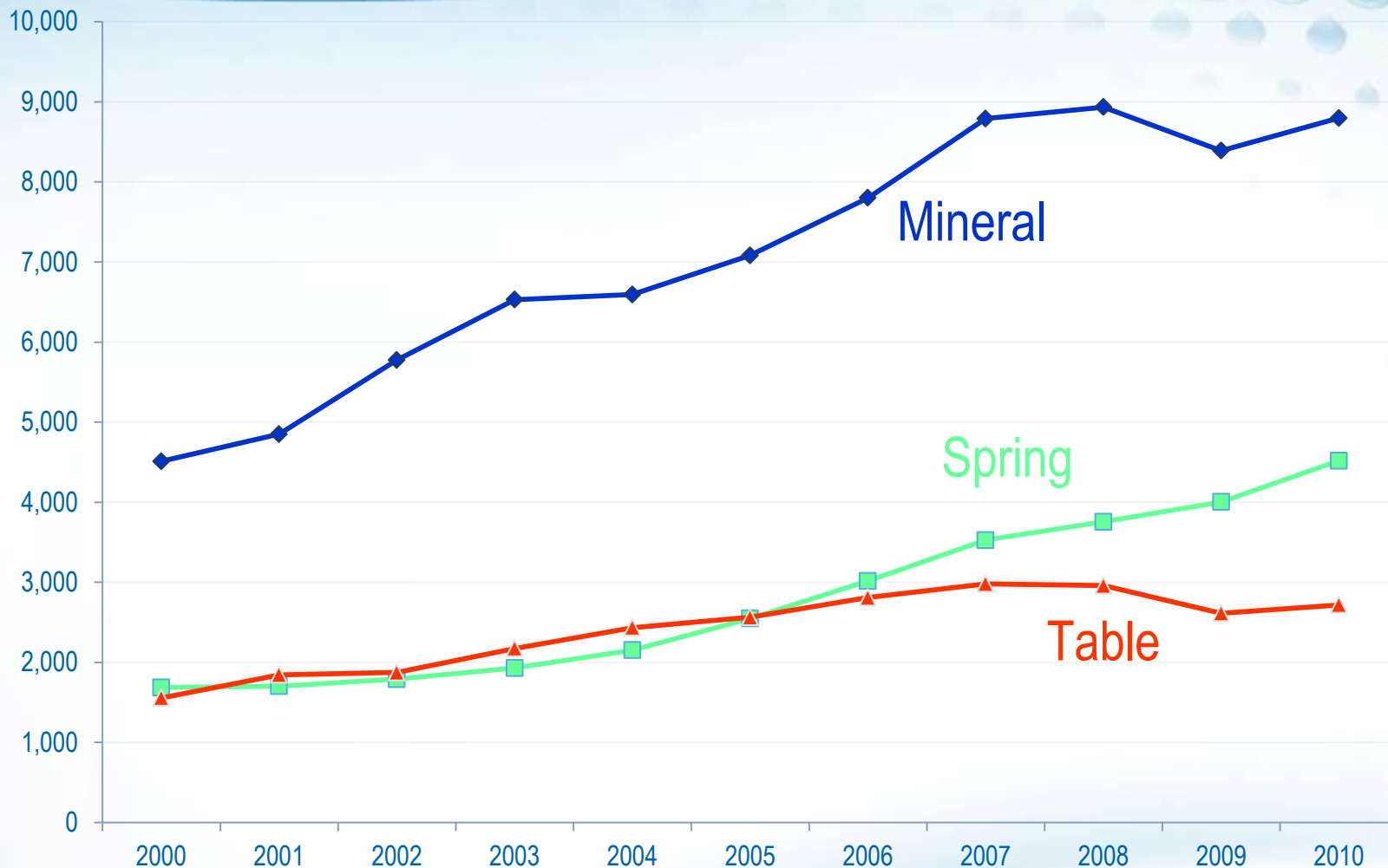
Europe – Water Source



West Europe – Water Source

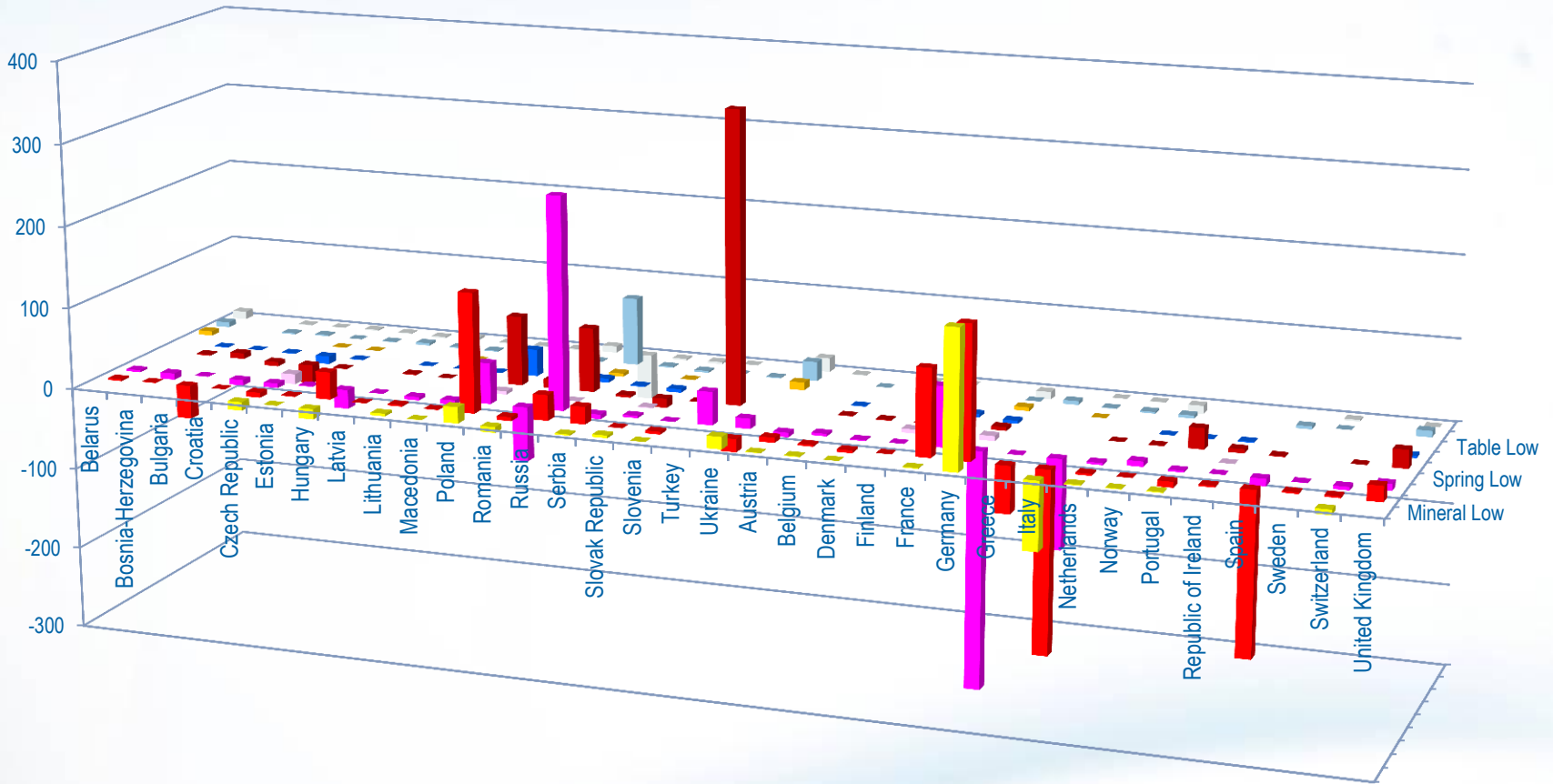


East Europe – Water Source



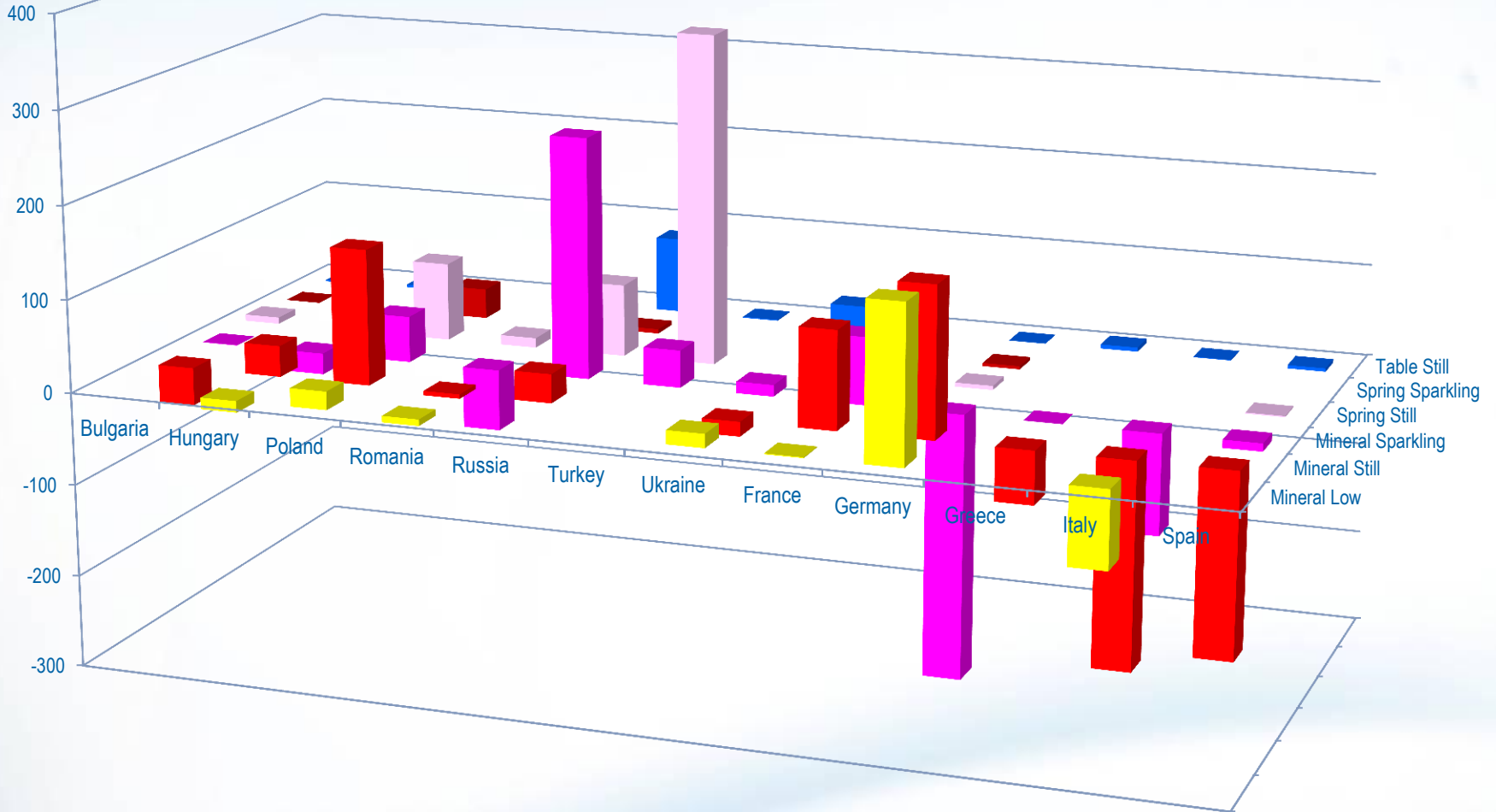
What's Up, What's Down

09-10 YOY Growth

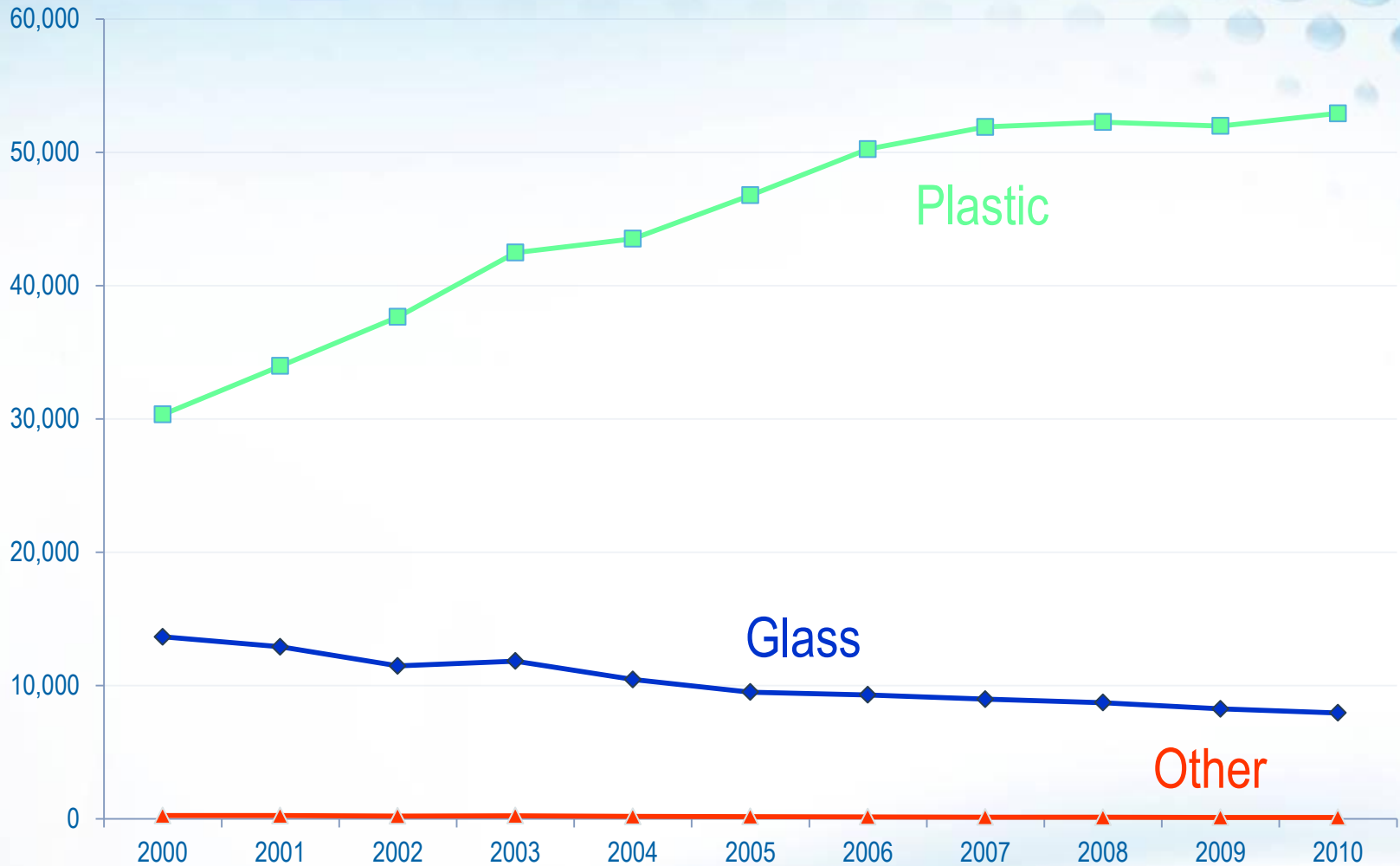


What's Up, What's Down

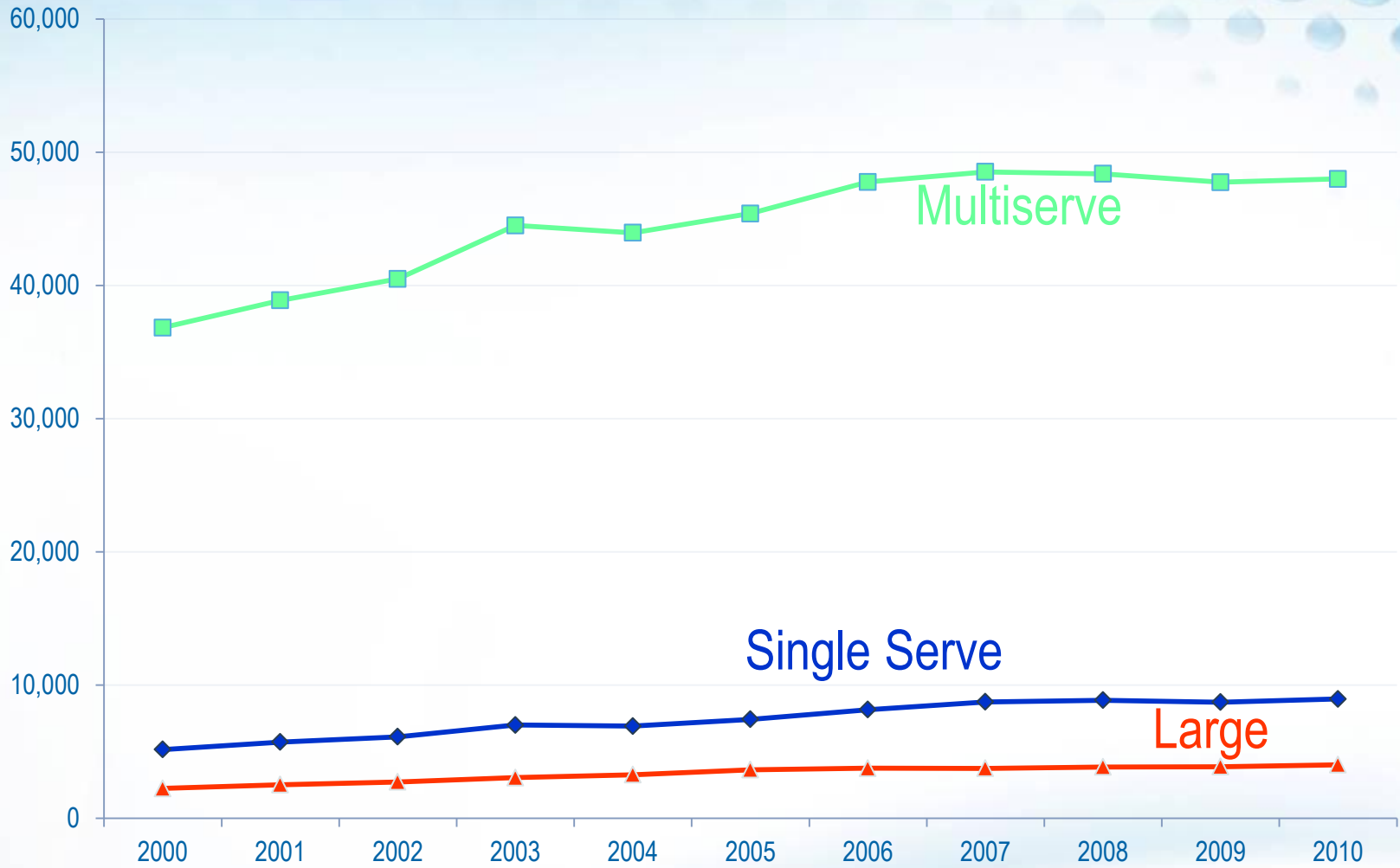
09-10 YOY Growth



Europe – Pack Type

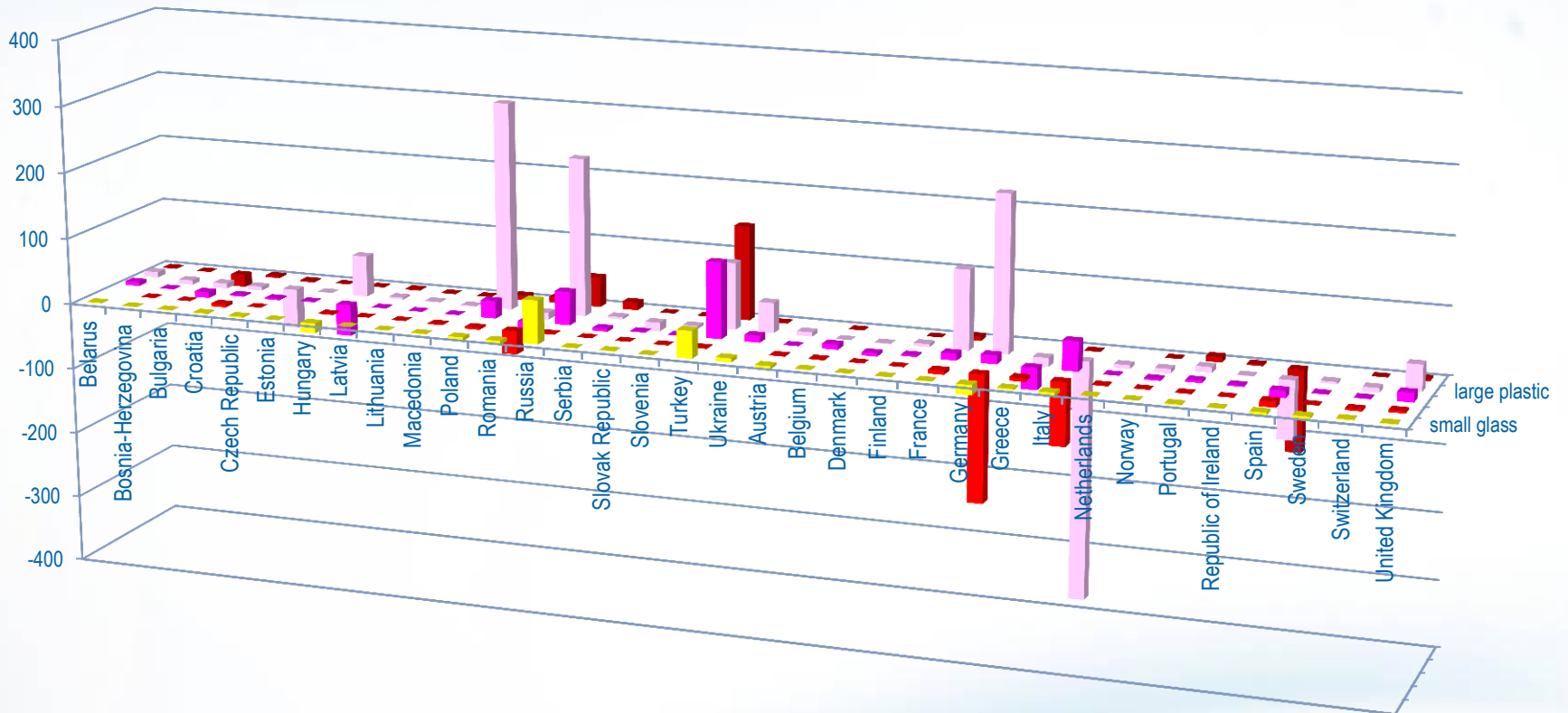


Europe – Pack Size



What's Up, What's Down

09-10 YOY Growth

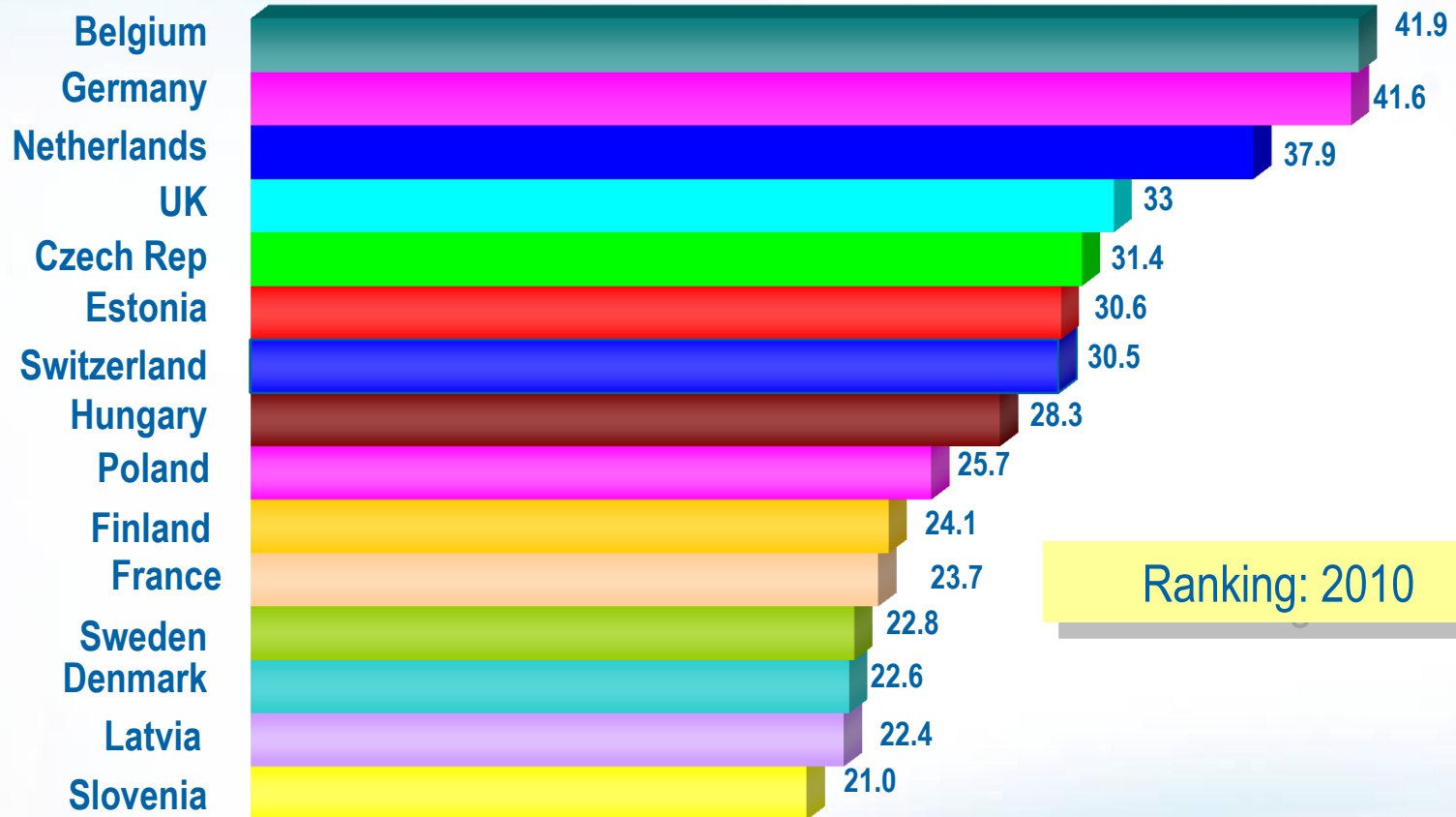


Europe – Private Label Share



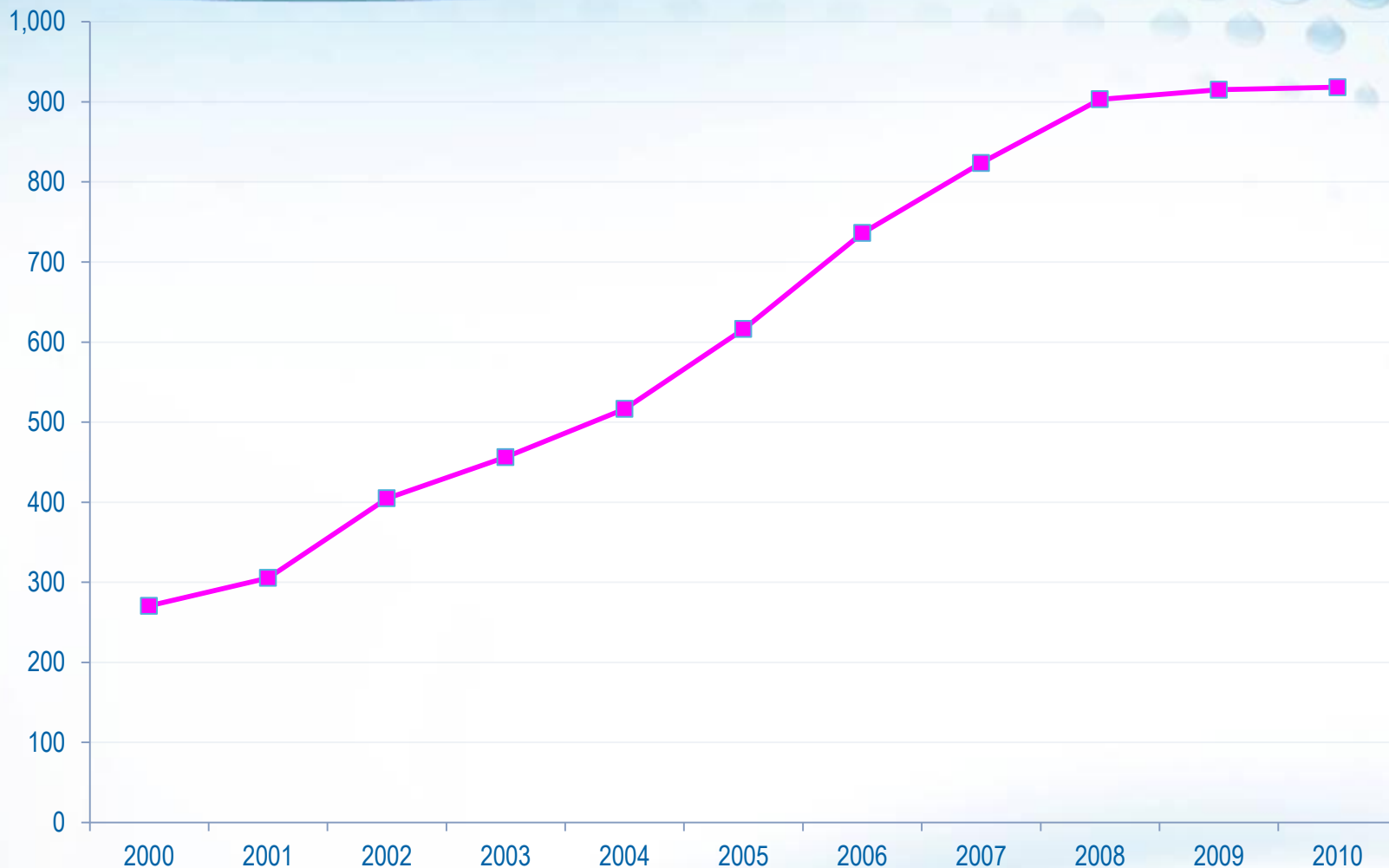
Top 15 Private Label Markets – Europe, Bottled Water

European Average PL share: 19.9%

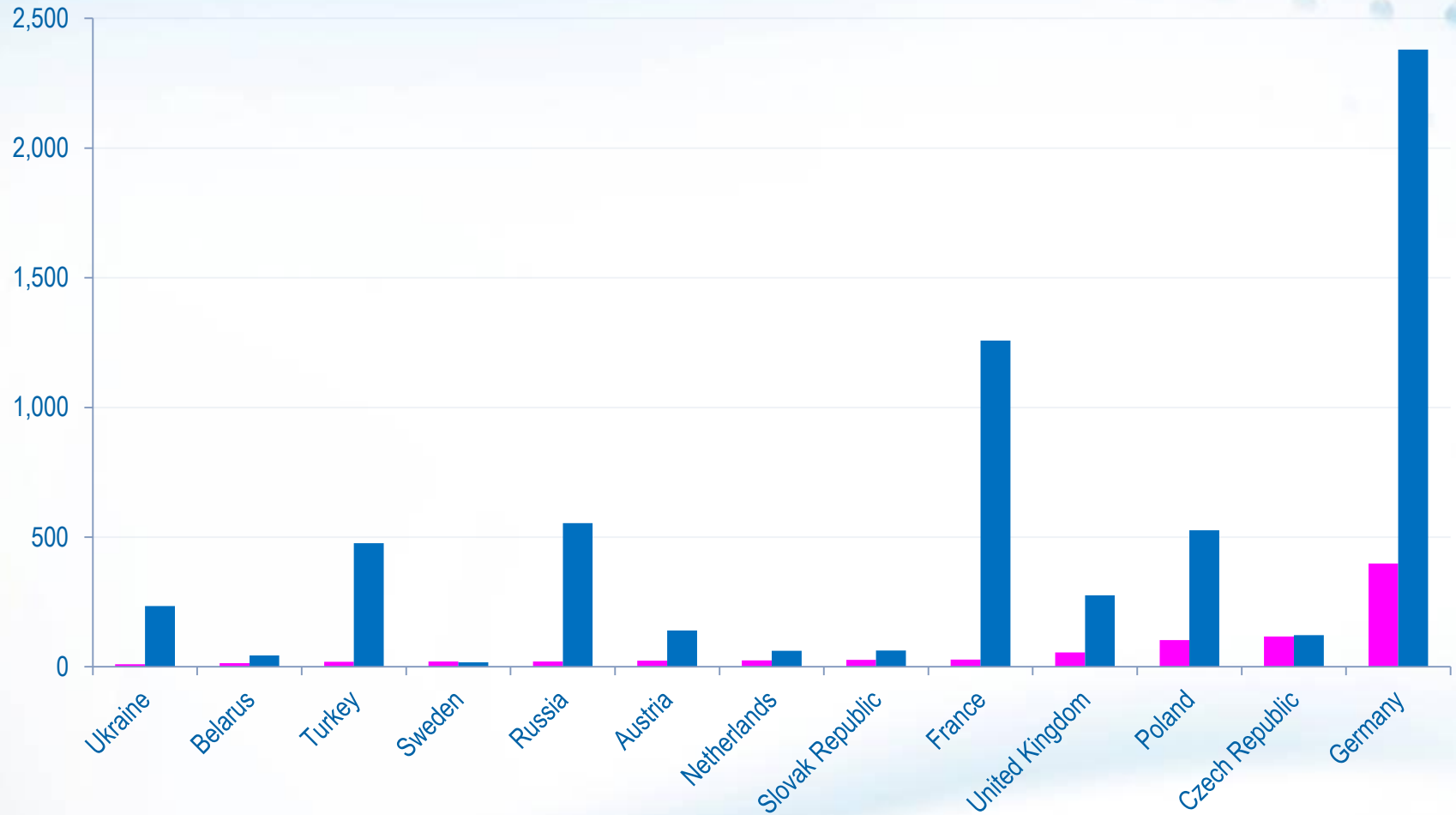


Ranking: 2010

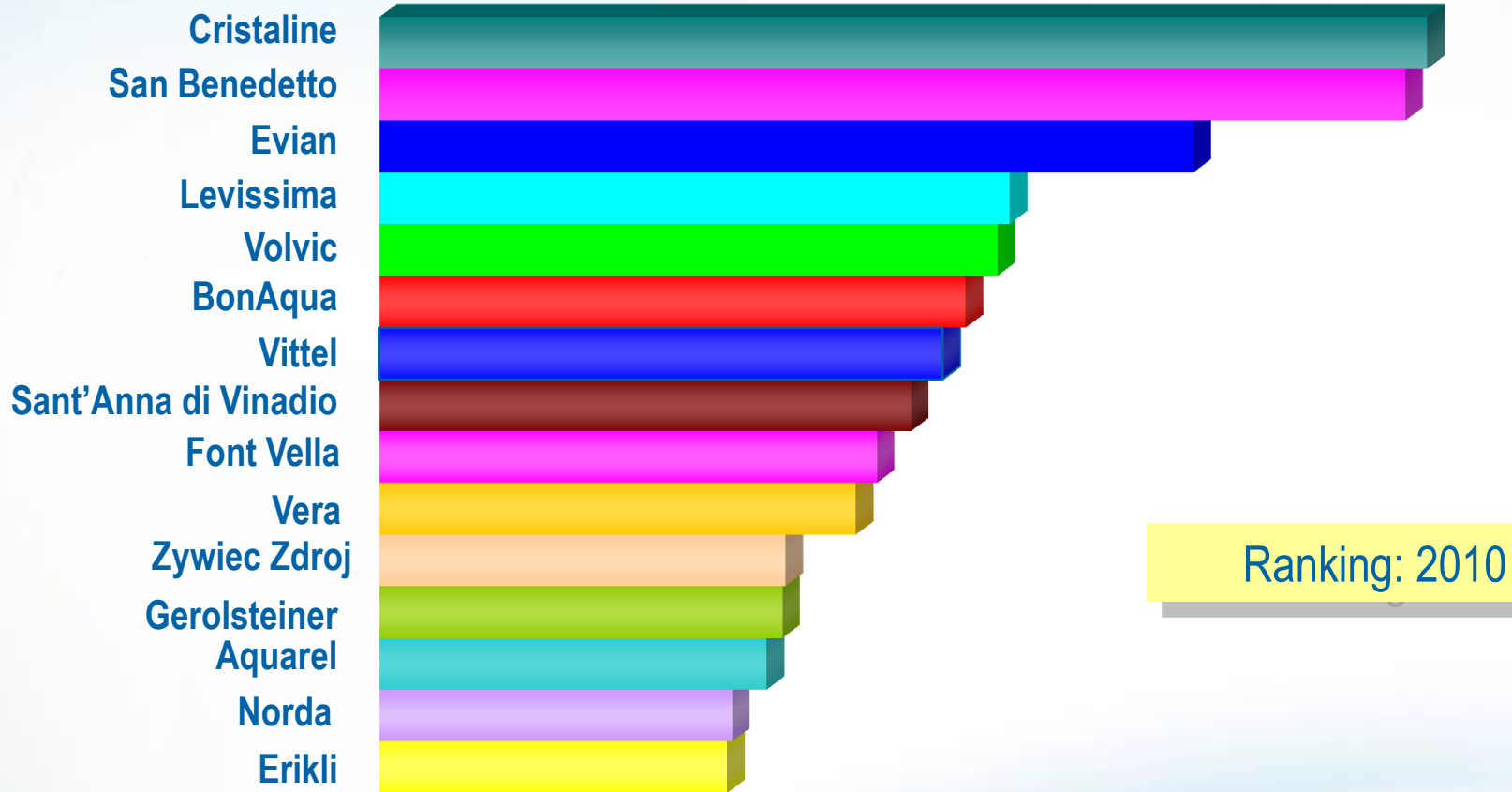
Europe – Flavoured Water



Plain Water & Flavoured Water

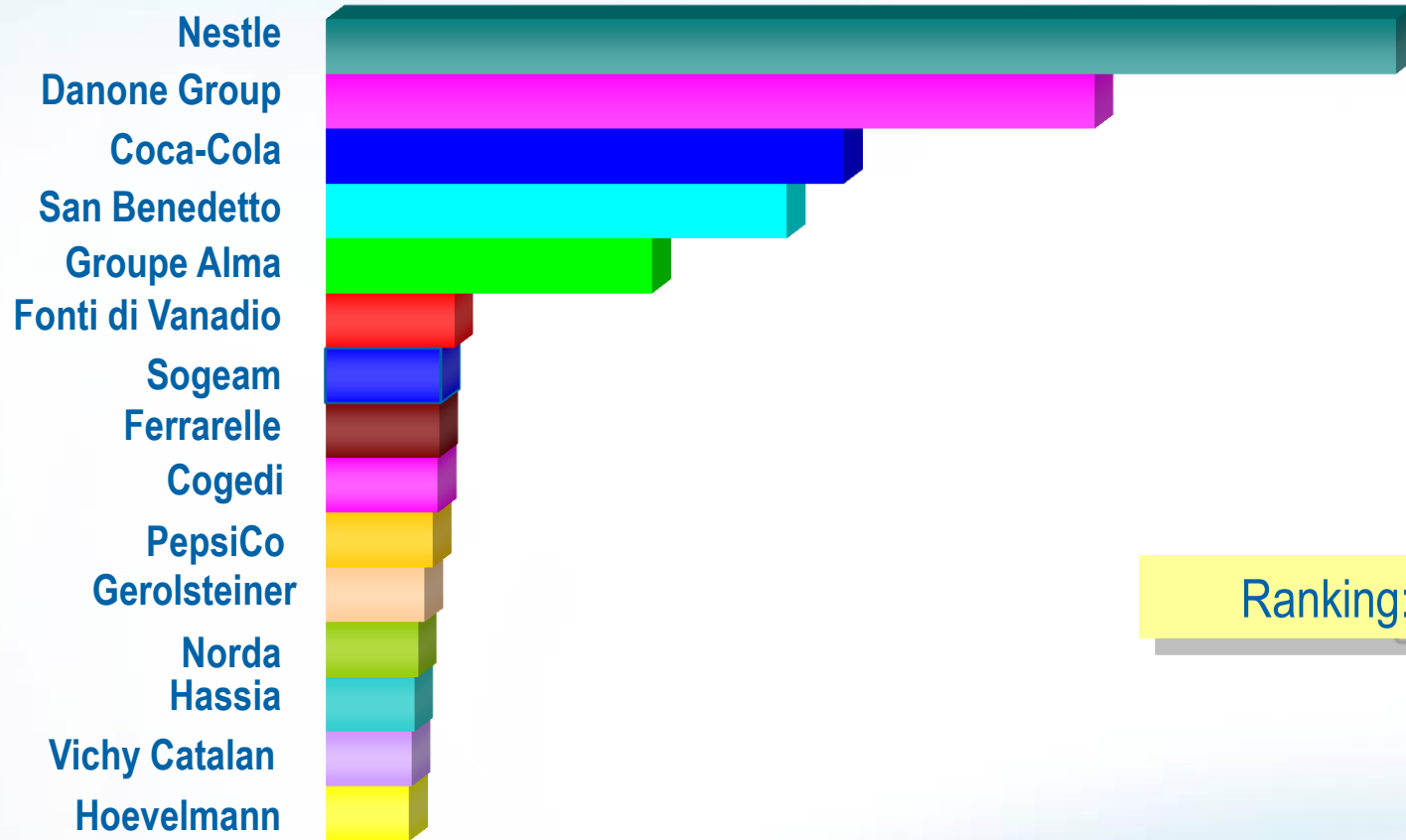


Top 15 Brands – Europe, Bottled Water



Ranking: 2010

Top 15 Brand Owners – Europe, Bottled Water



Ranking: 2010

Who is Where

