



# European Bottled Water - Overview

*Stewart Macintosh*

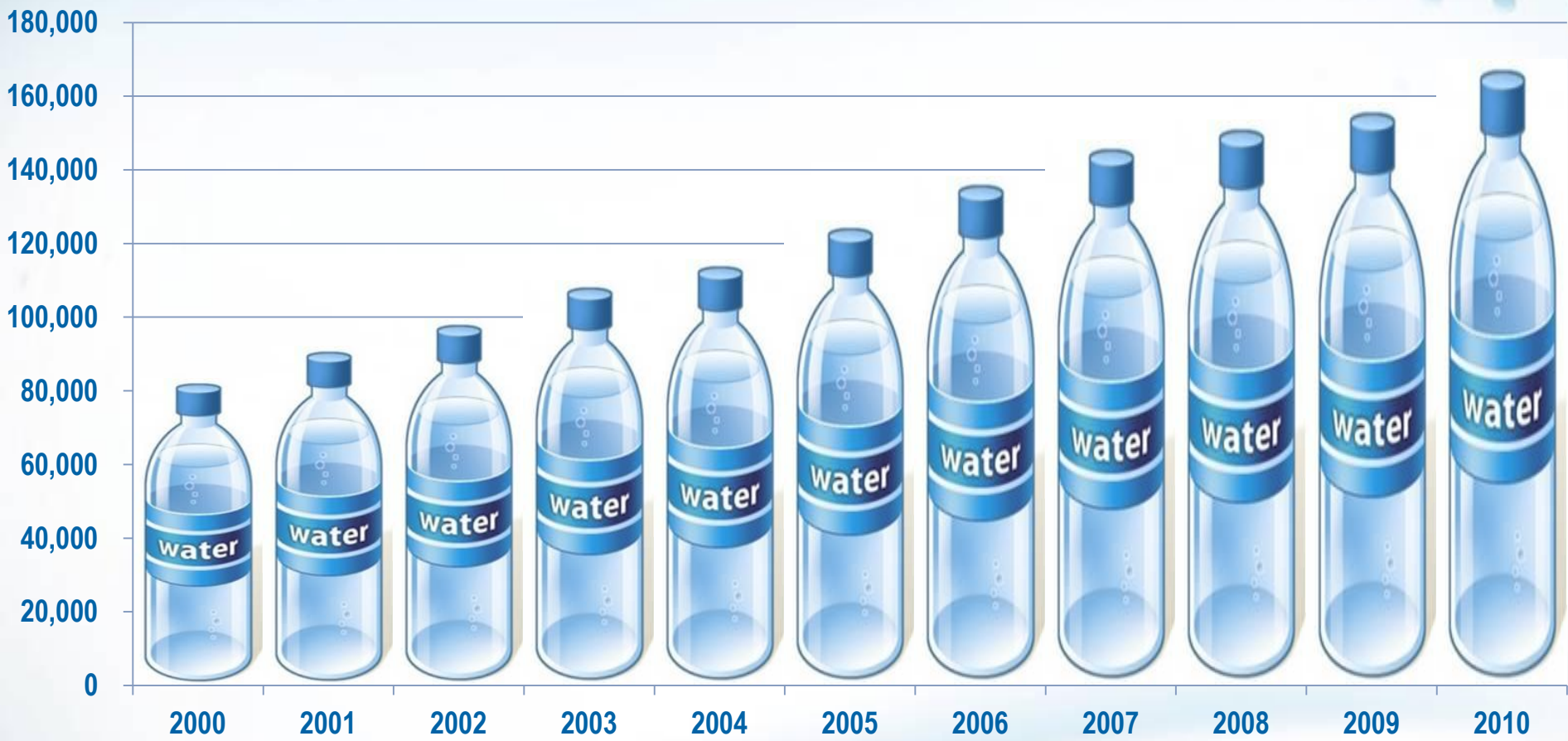
*16<sup>th</sup> June 2011*



# The Big Picture

# Global Bottled Water

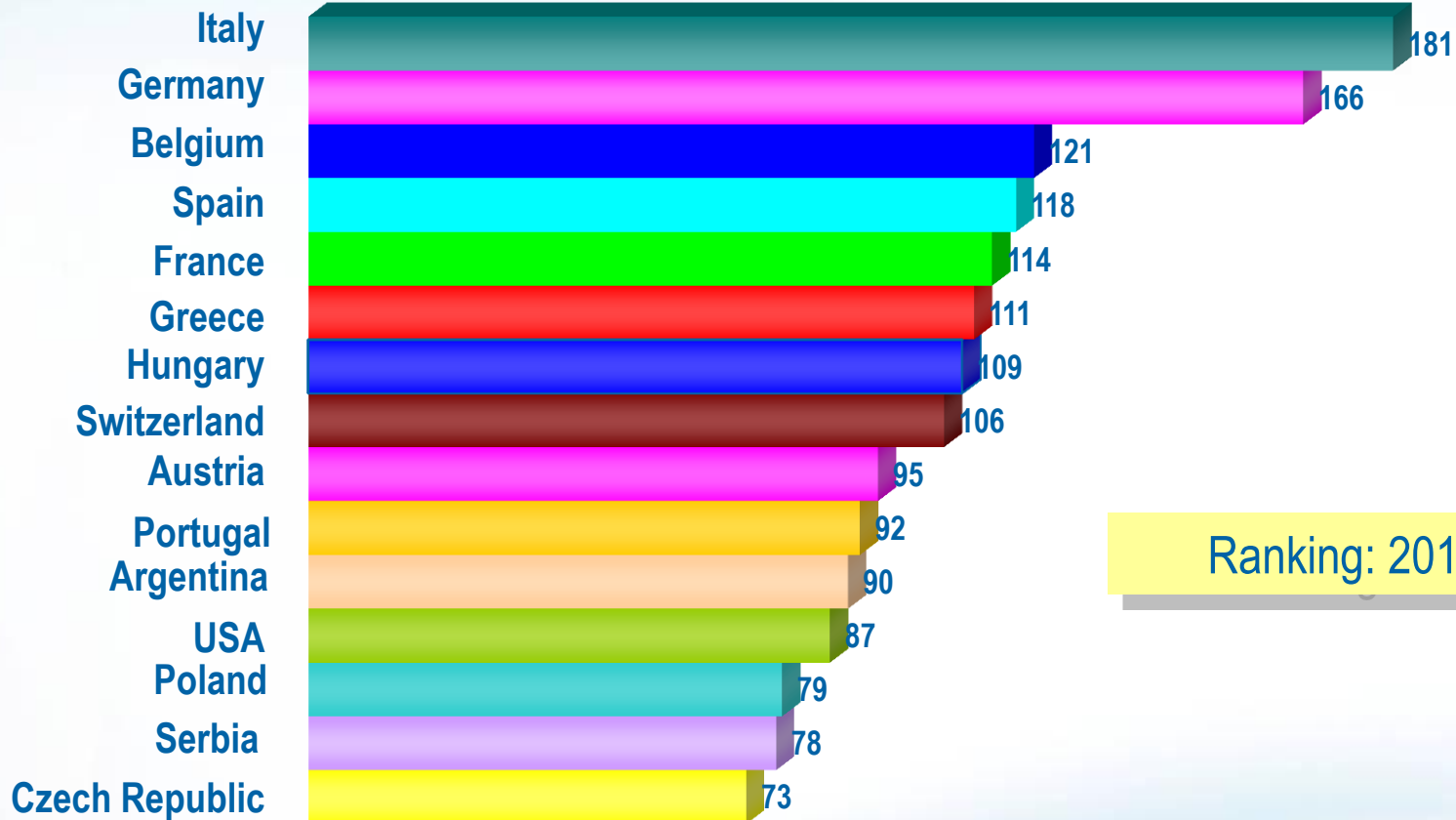
M Litres



# Top 15 Bottled Water Markets Worldwide – by per capita consumption

Litres per capita

Global Total: 24.7

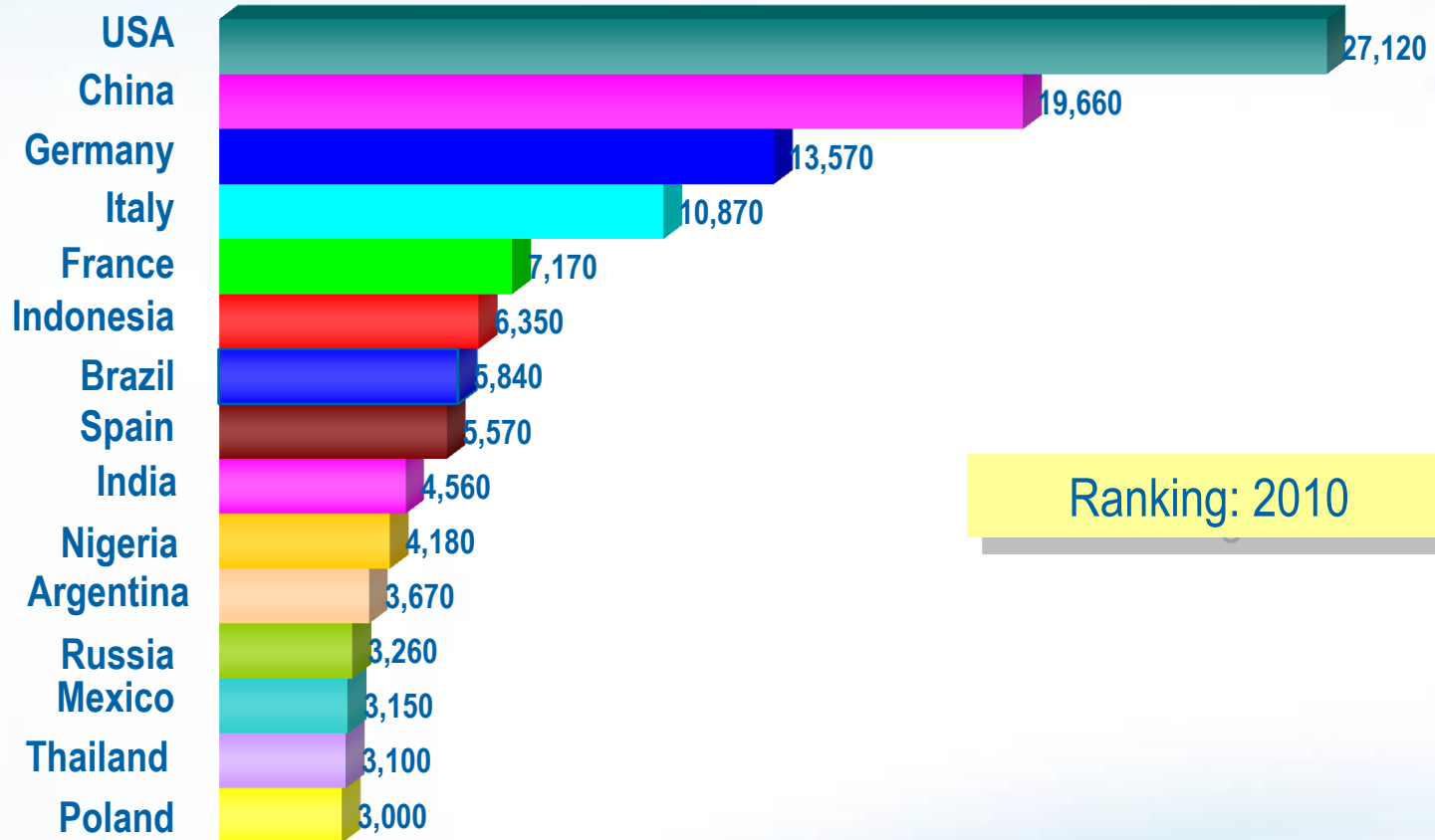


Ranking: 2010

# Top 15 Bottled Water Markets Worldwide – by volume

M Litres

Global Total: 169 Billion Litres

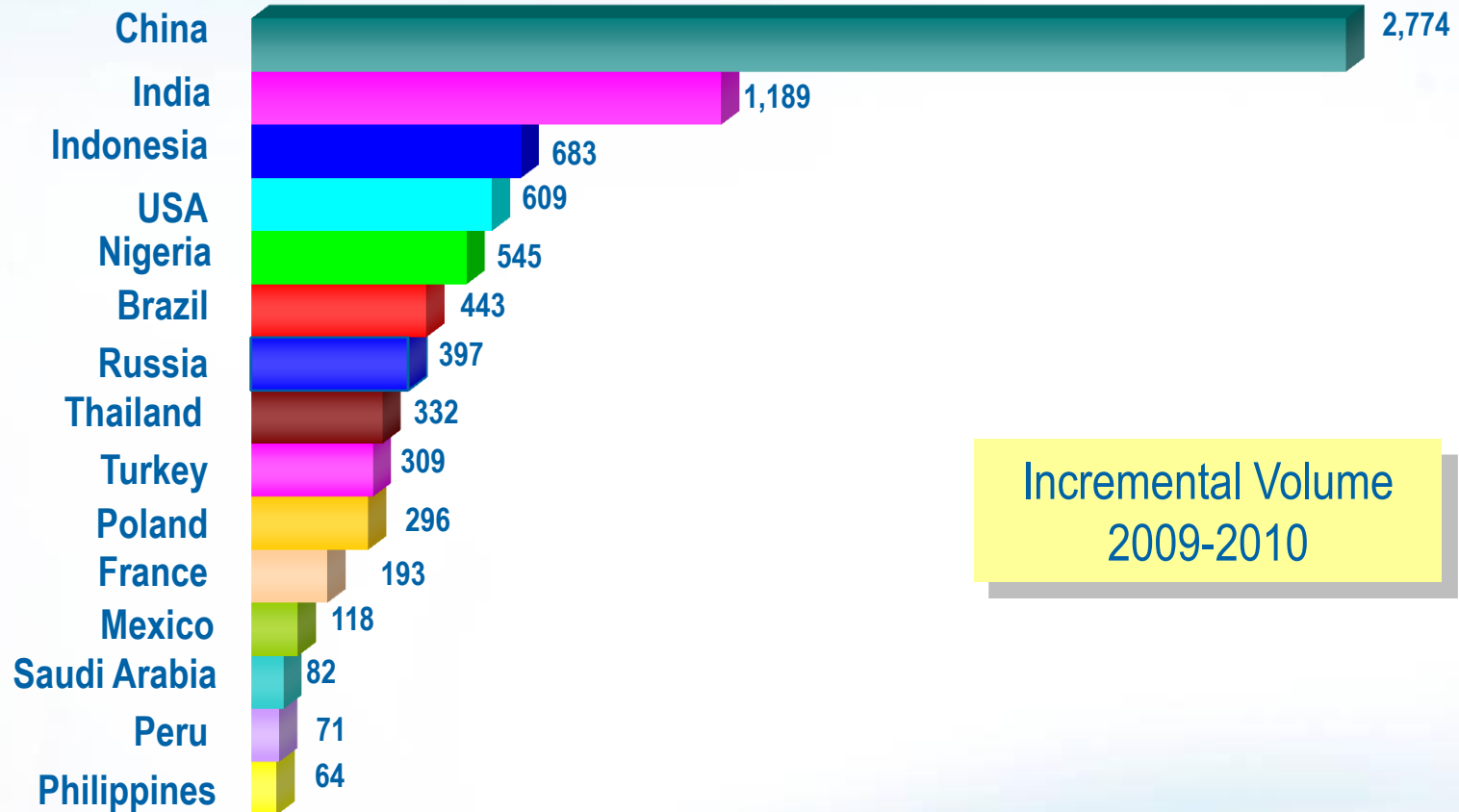


Ranking: 2010

# Fastest Growing Bottled Water Markets Worldwide – by volume

M Litres

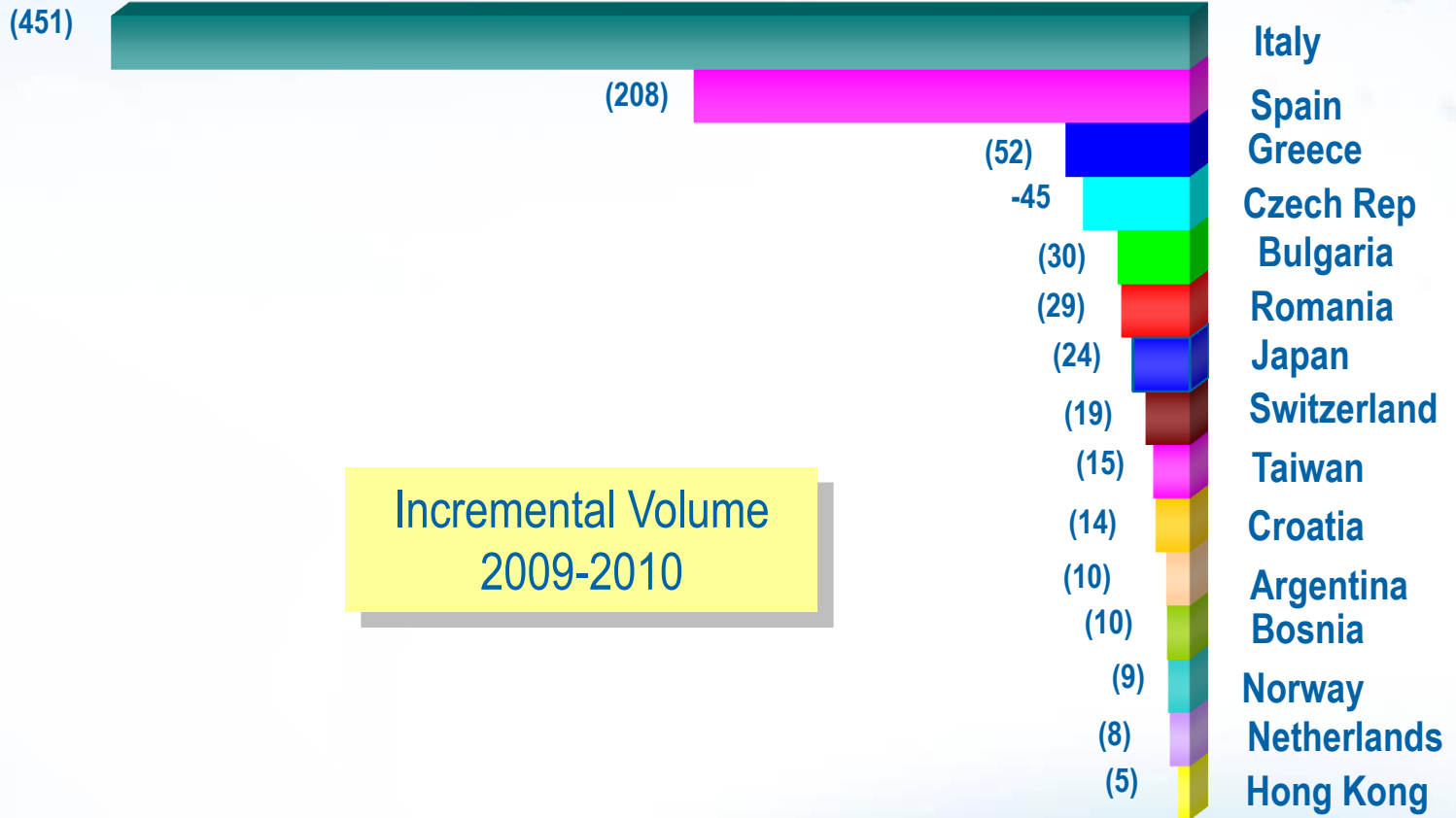
Global Growth: 9,350 M Litres



# Fastest Shrinking Bottled Water Markets Worldwide – by volume

M Litres

Global Growth: 9,350 M Litres

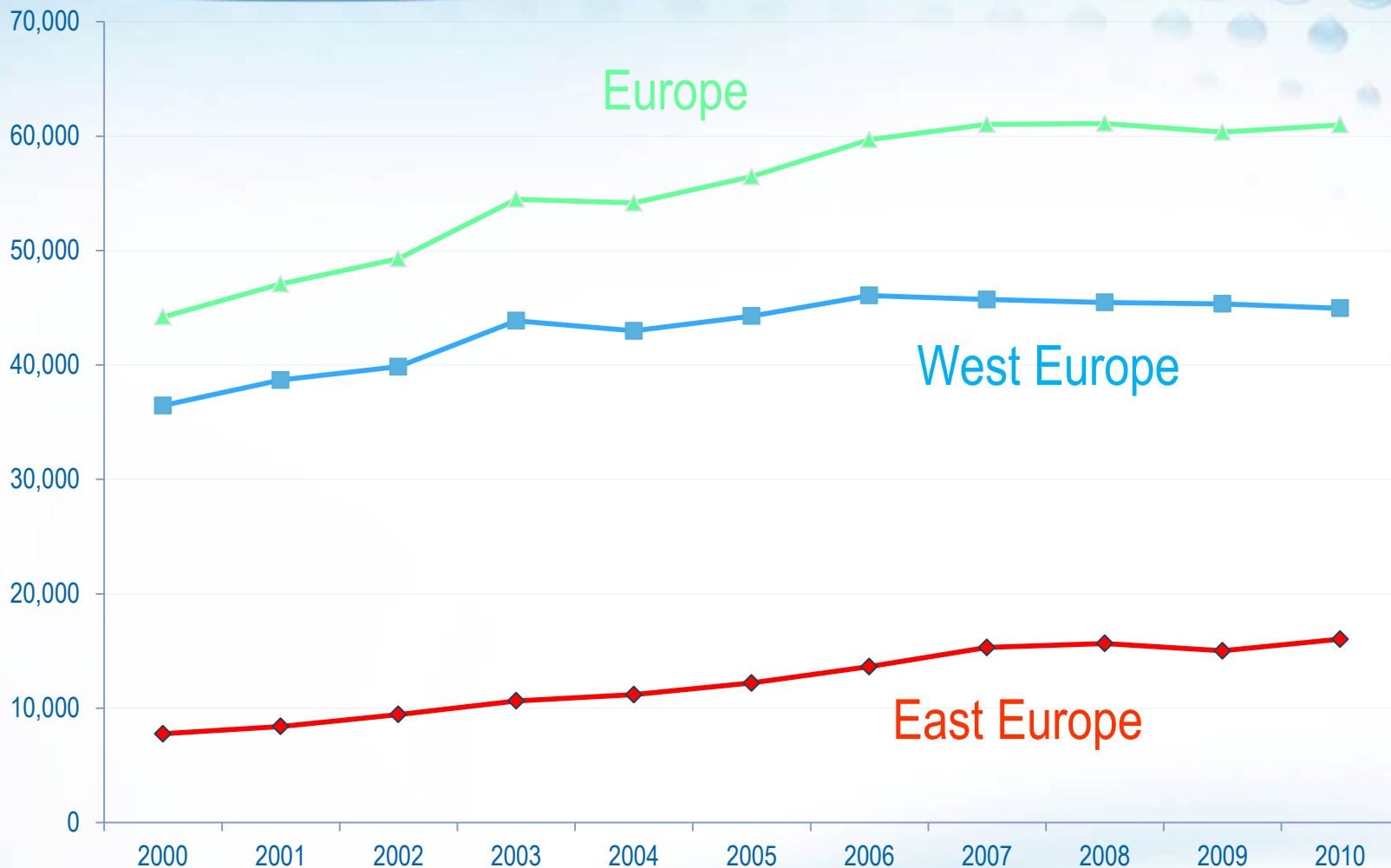


Incremental Volume  
2009-2010

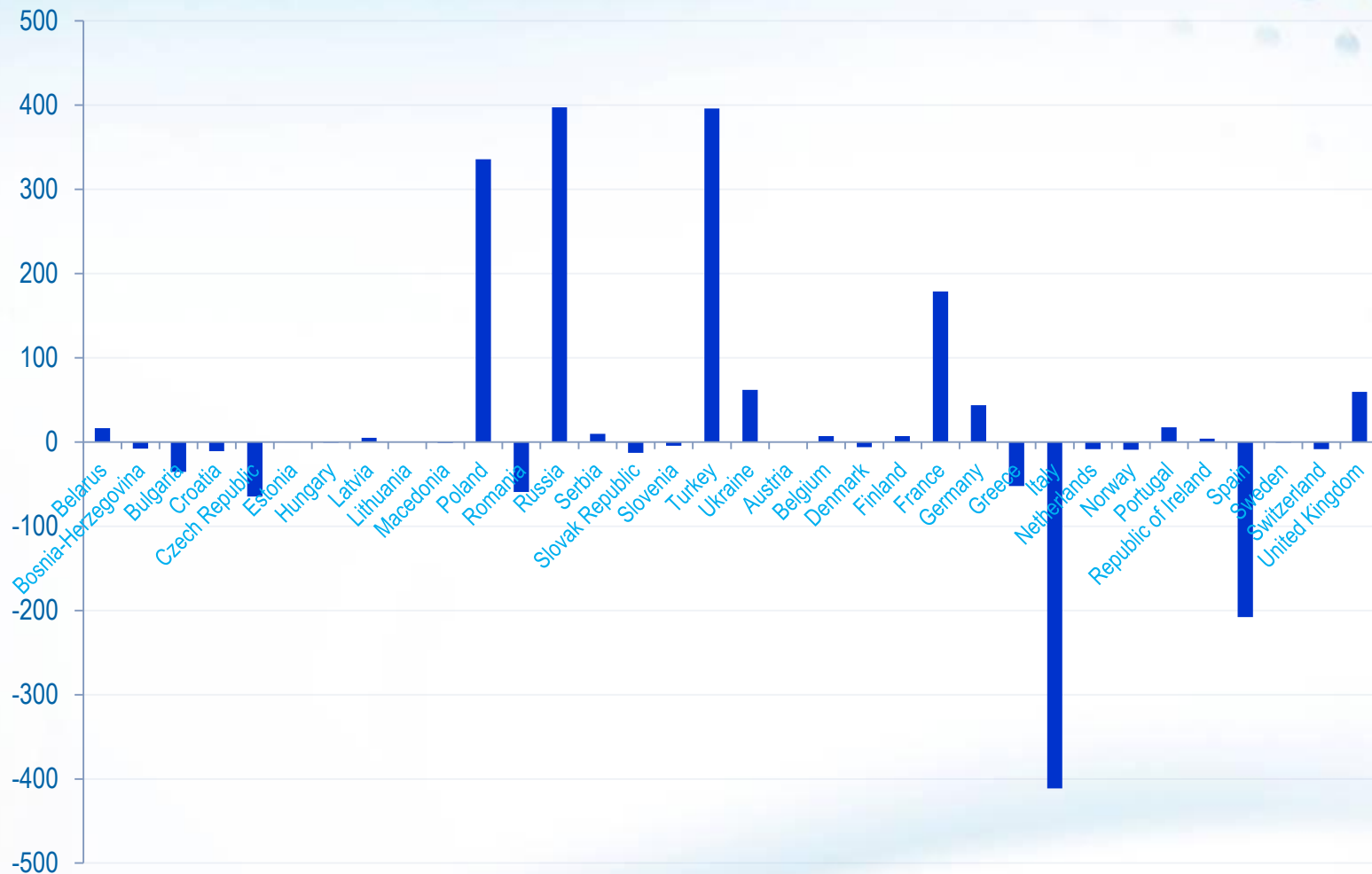


Within Europe

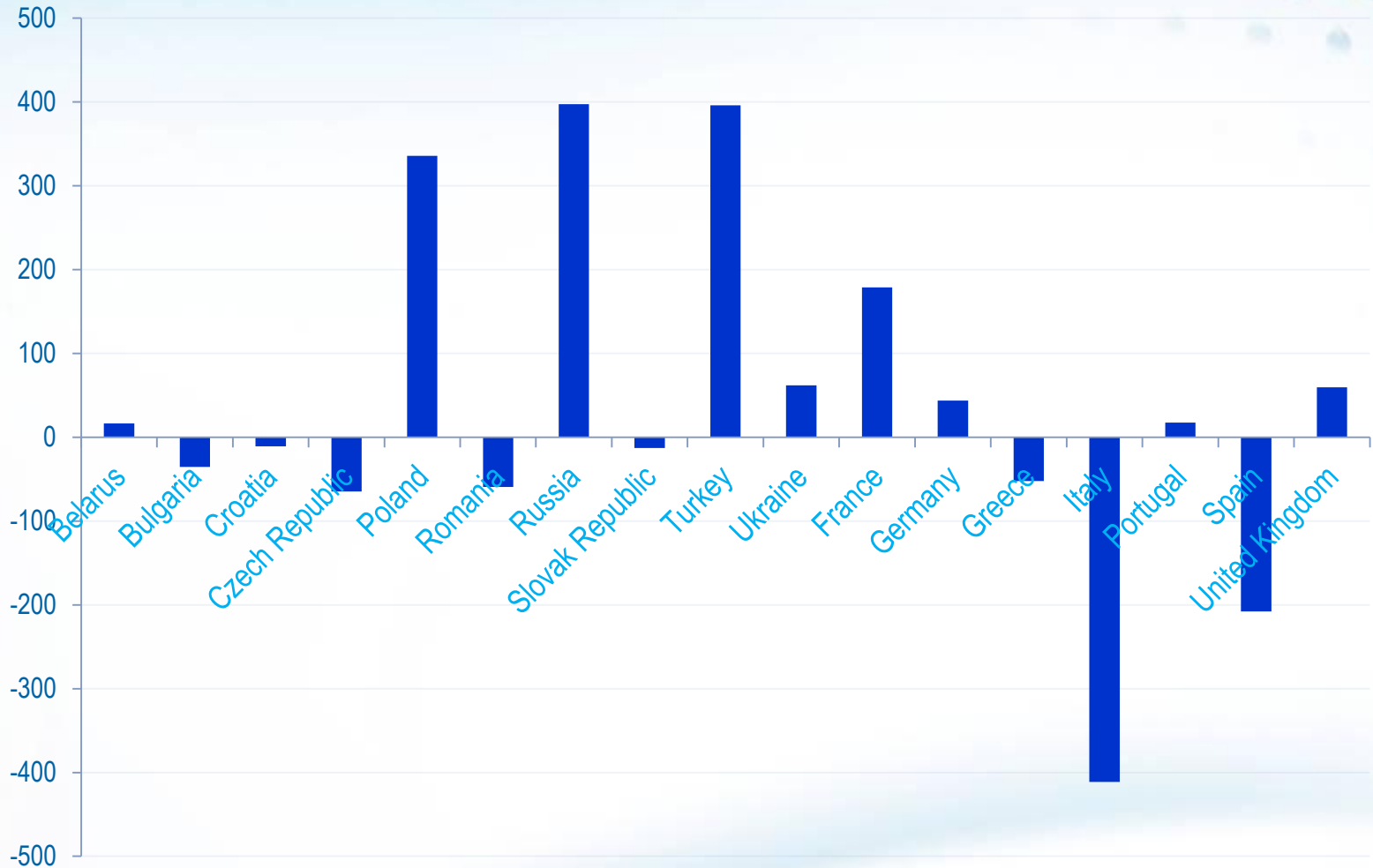
# Europe – East & West



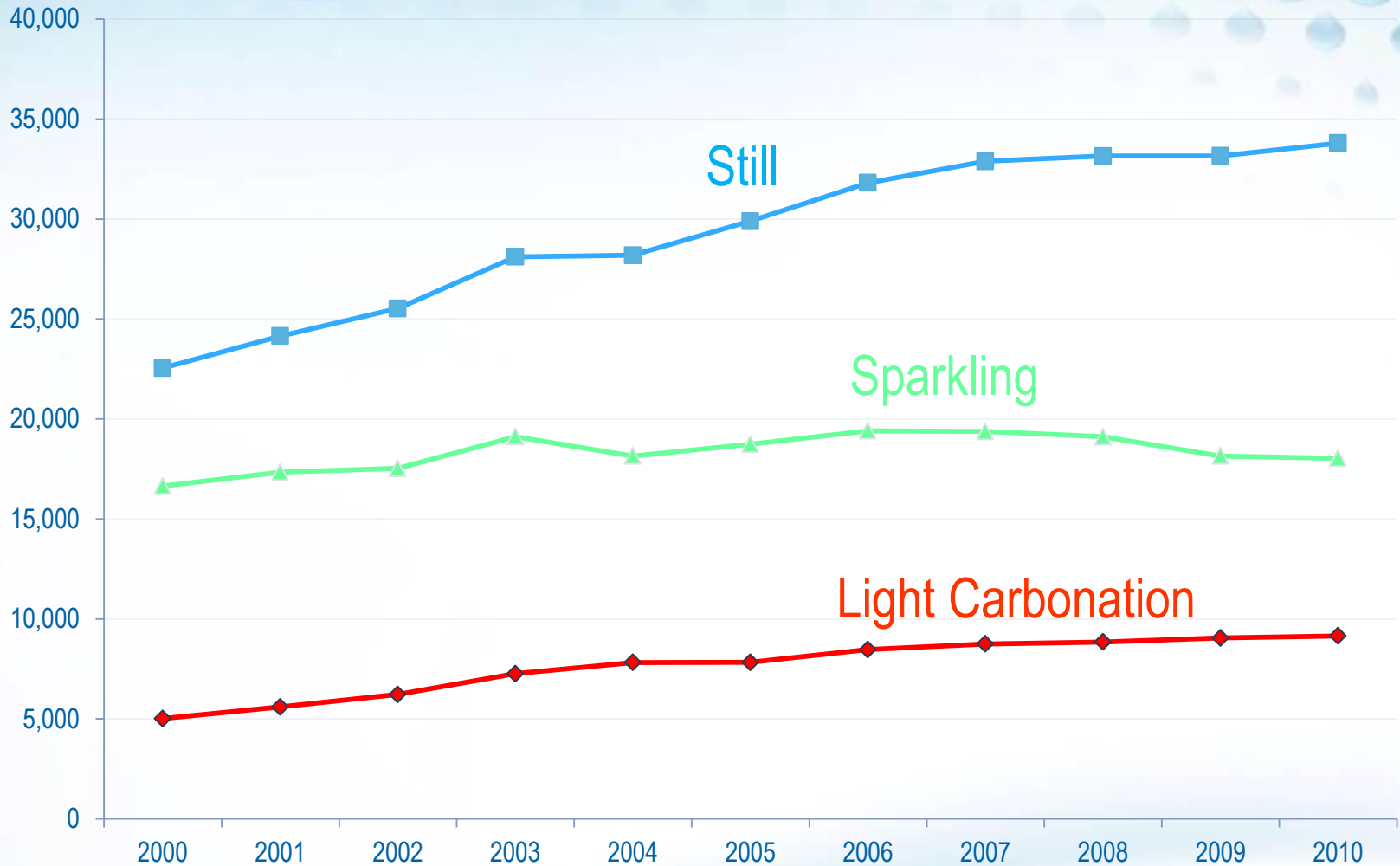
# Where was the Growth ?



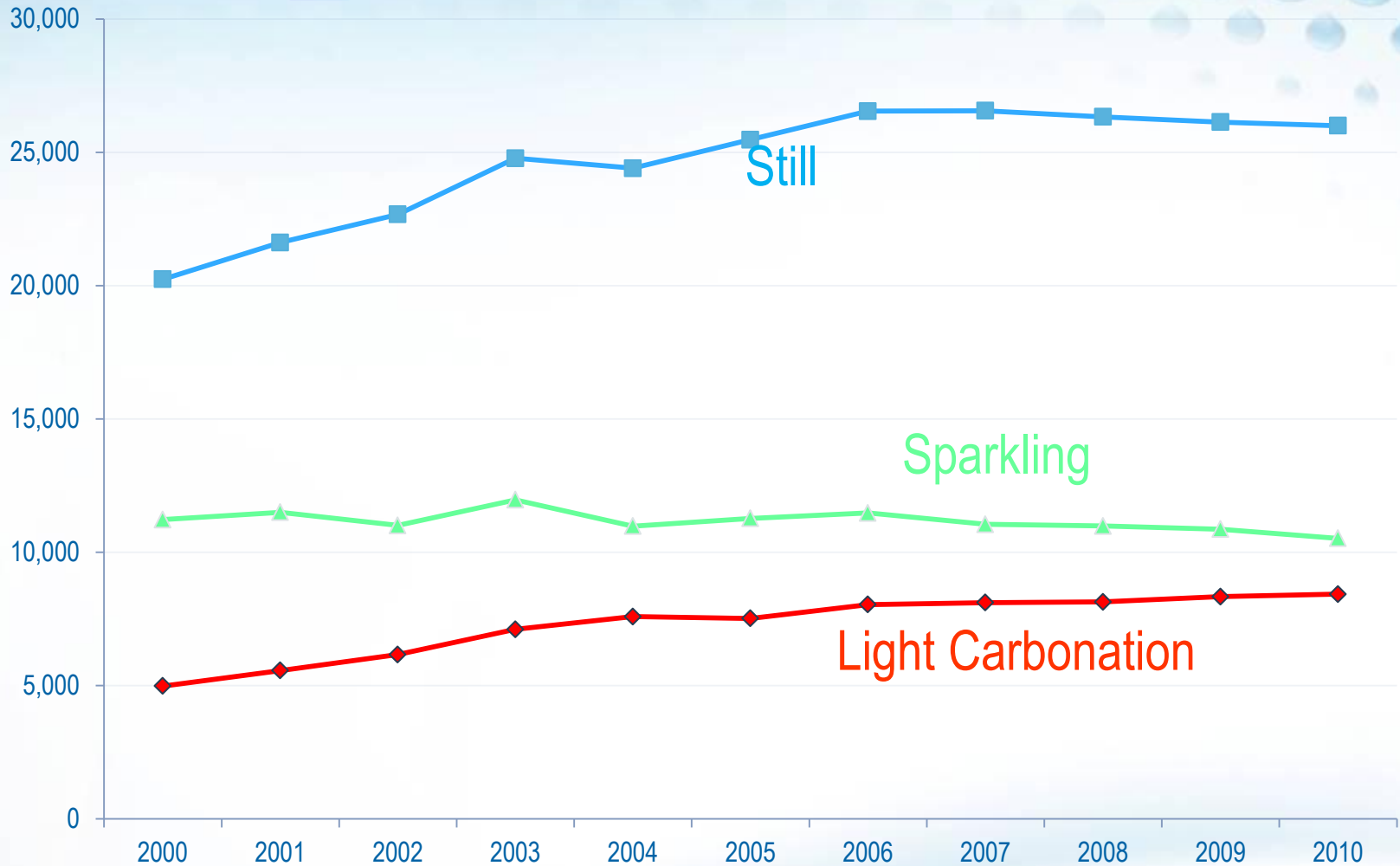
# Where was the Growth ?



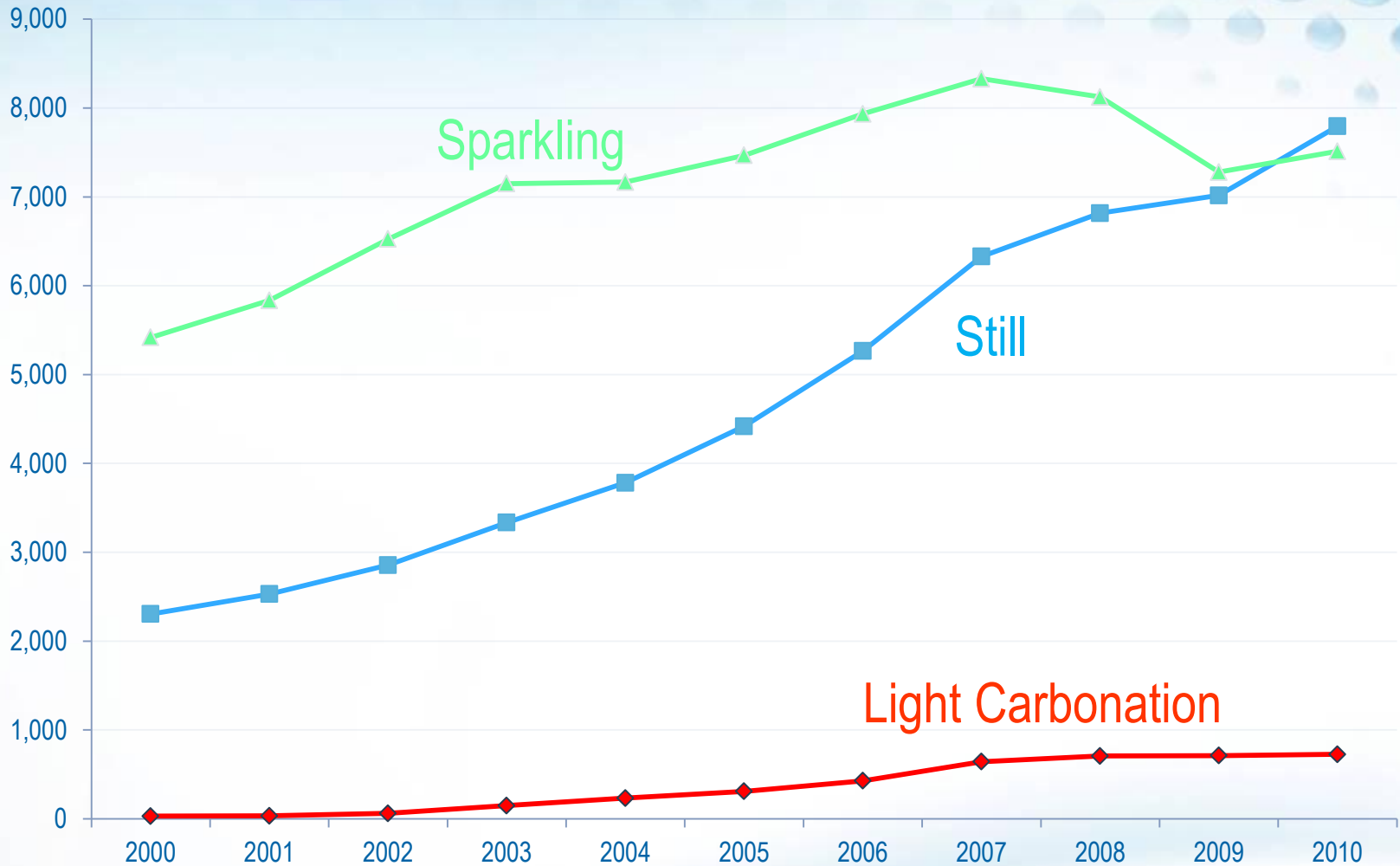
# Europe - Carbonation



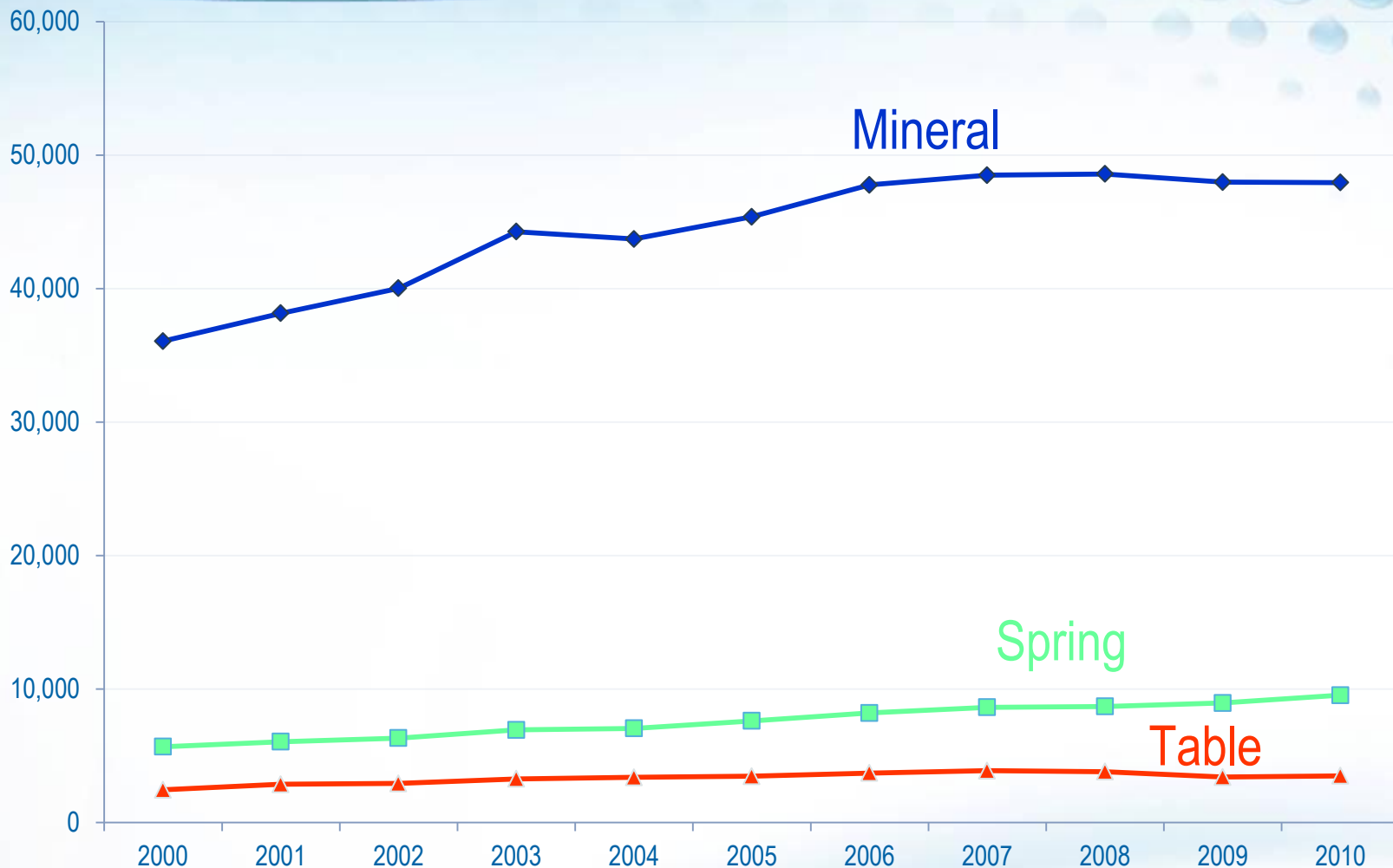
# West Europe - Carbonation



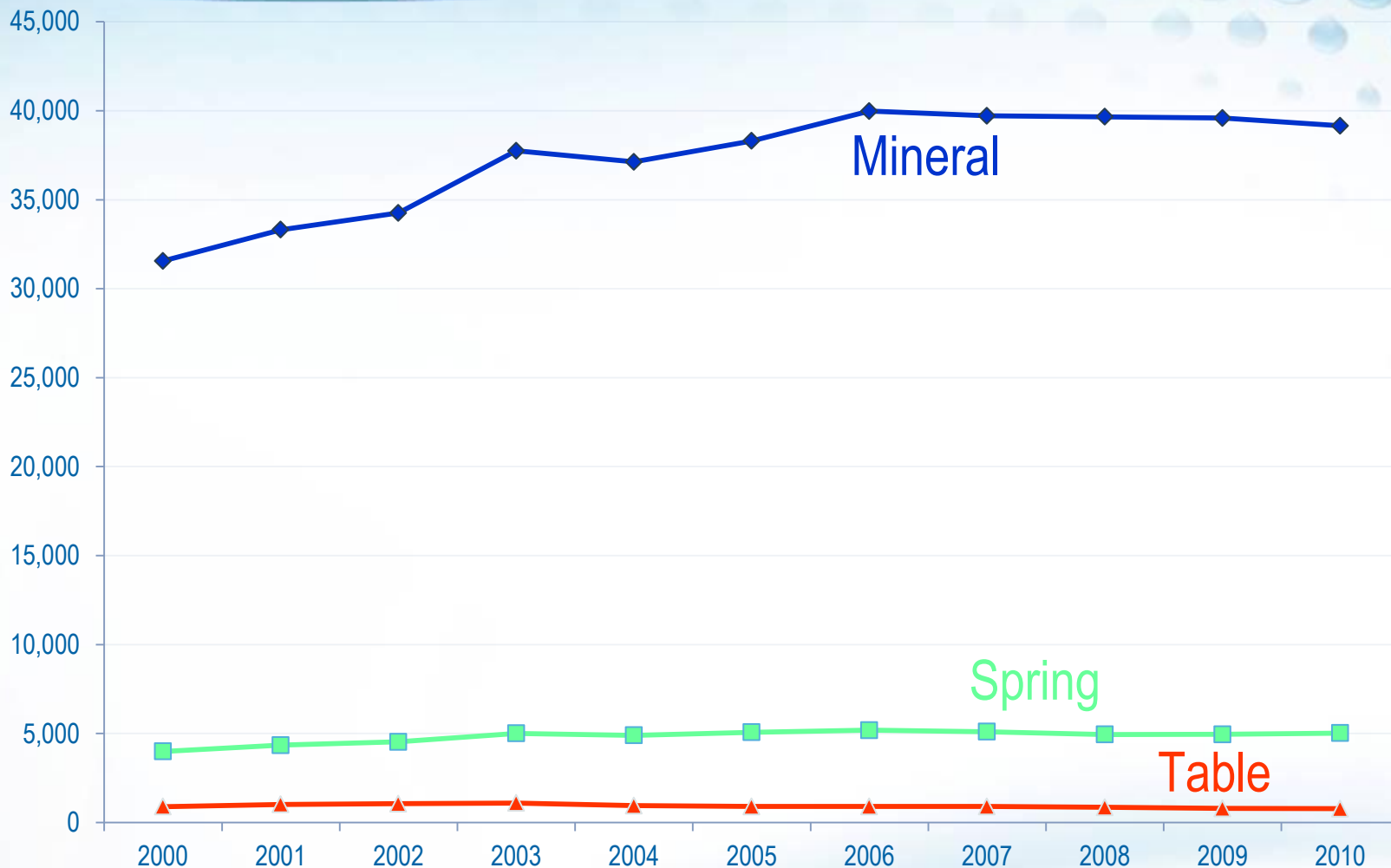
# East Europe - Carbonation



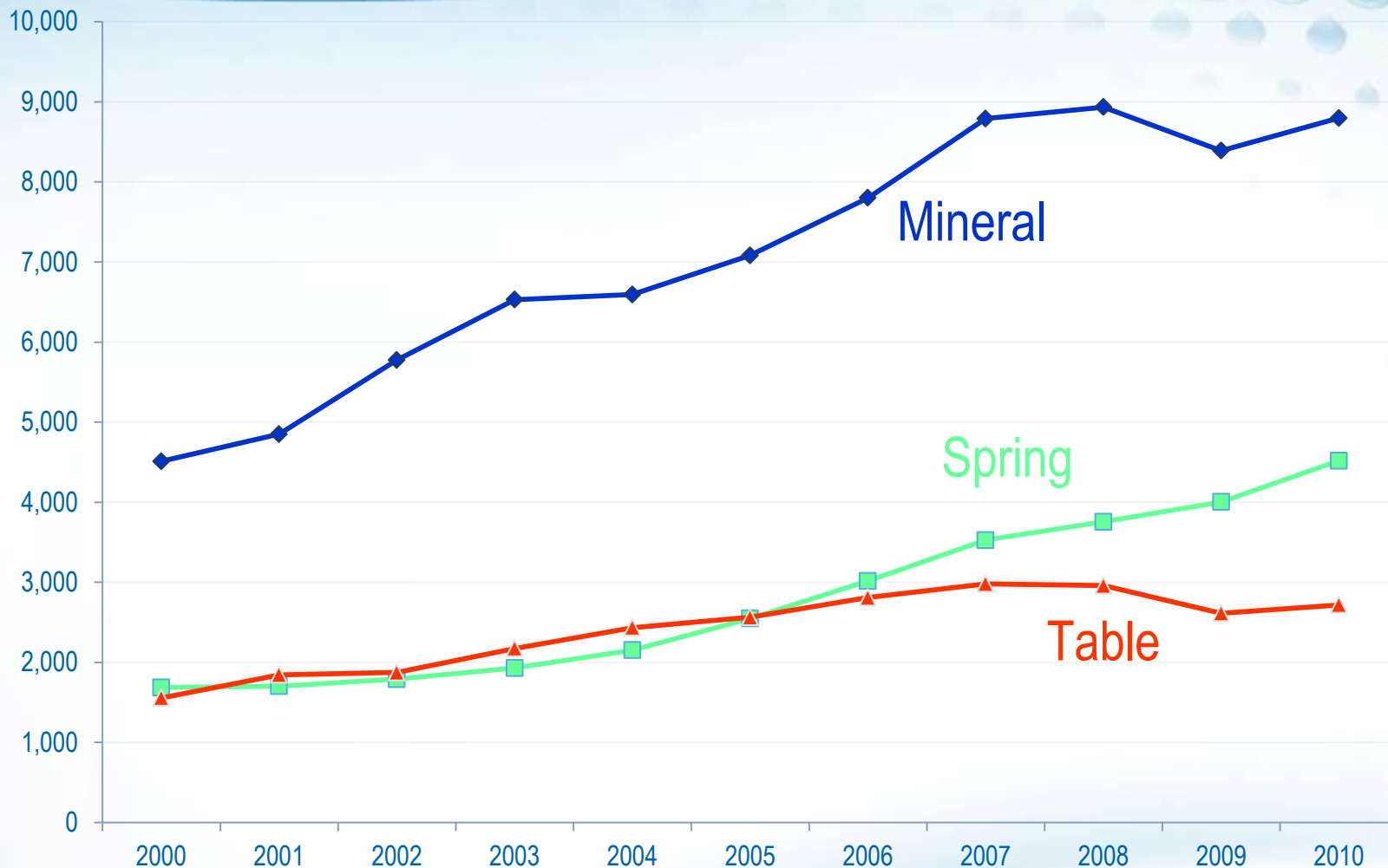
# Europe – Water Source



# West Europe – Water Source

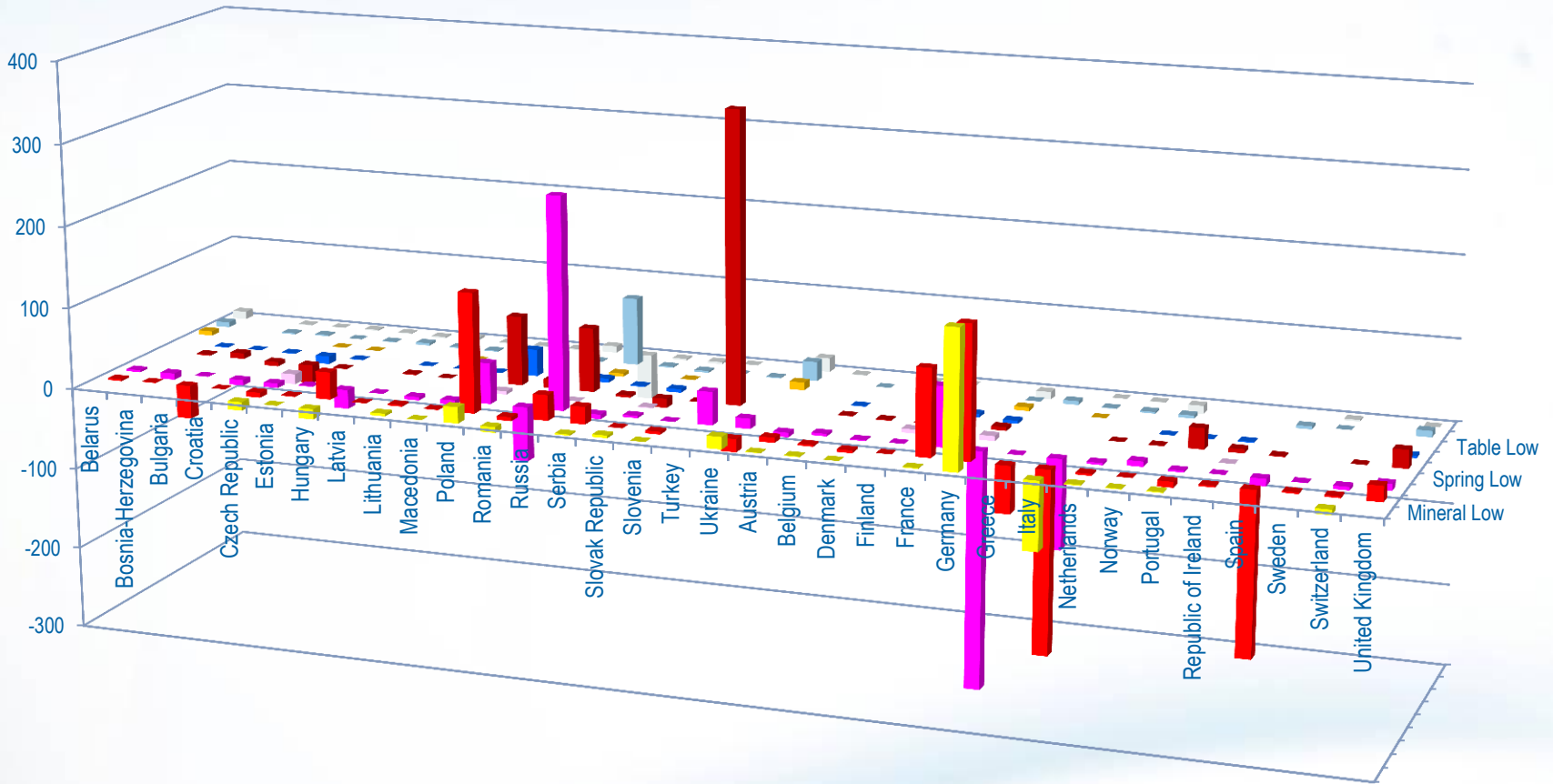


# East Europe – Water Source



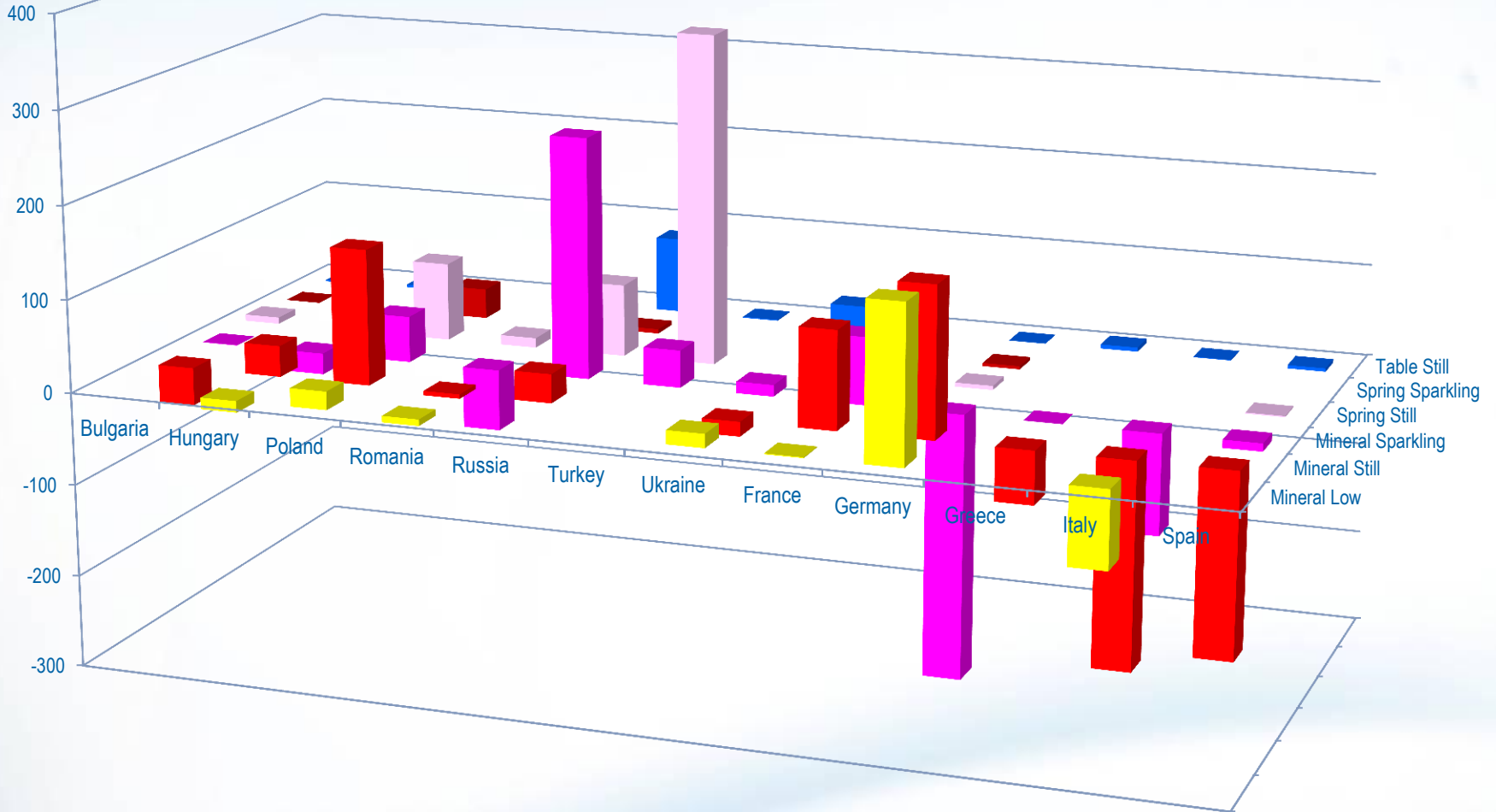
# What's Up, What's Down

09-10 YOY Growth

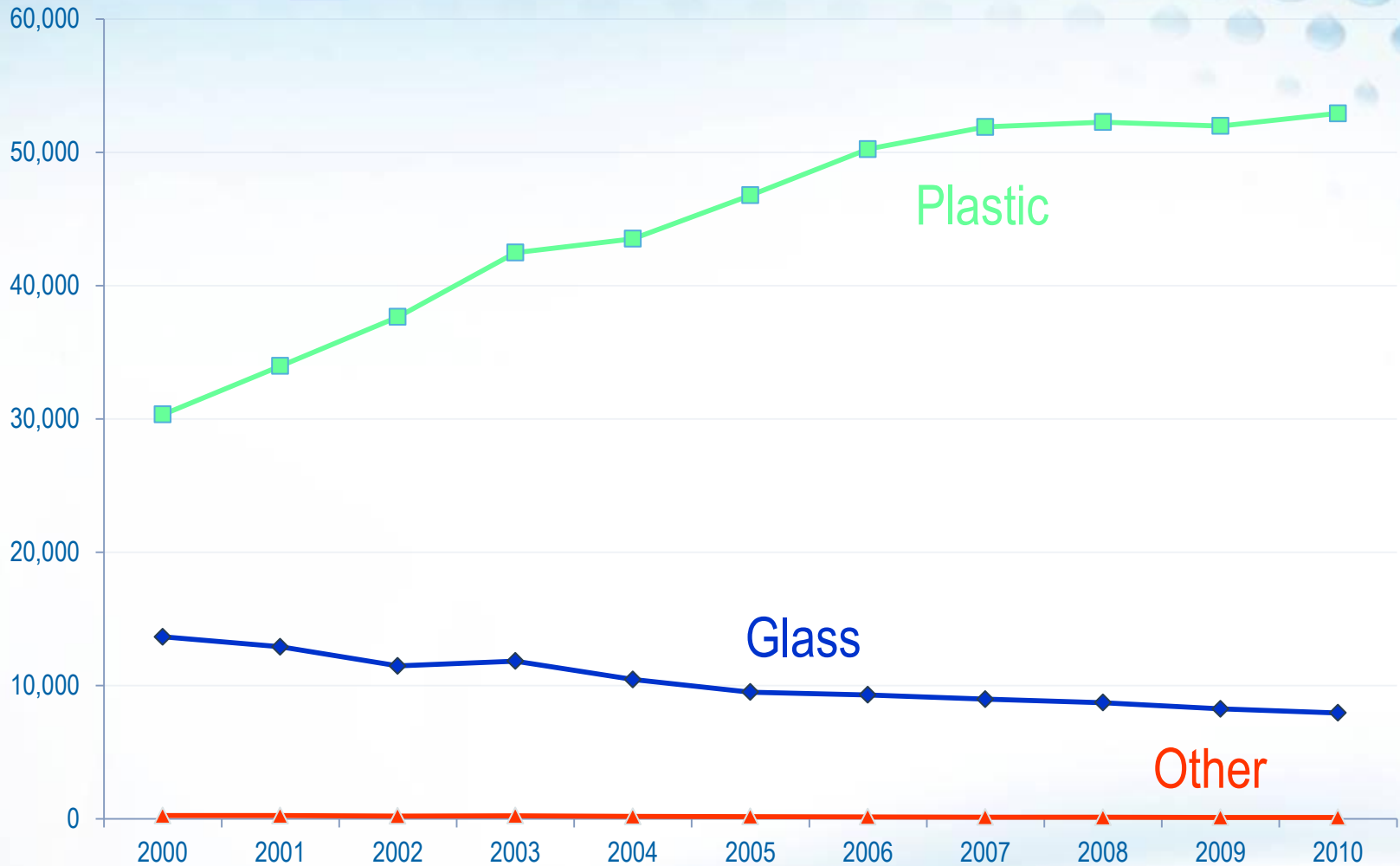


# What's Up, What's Down

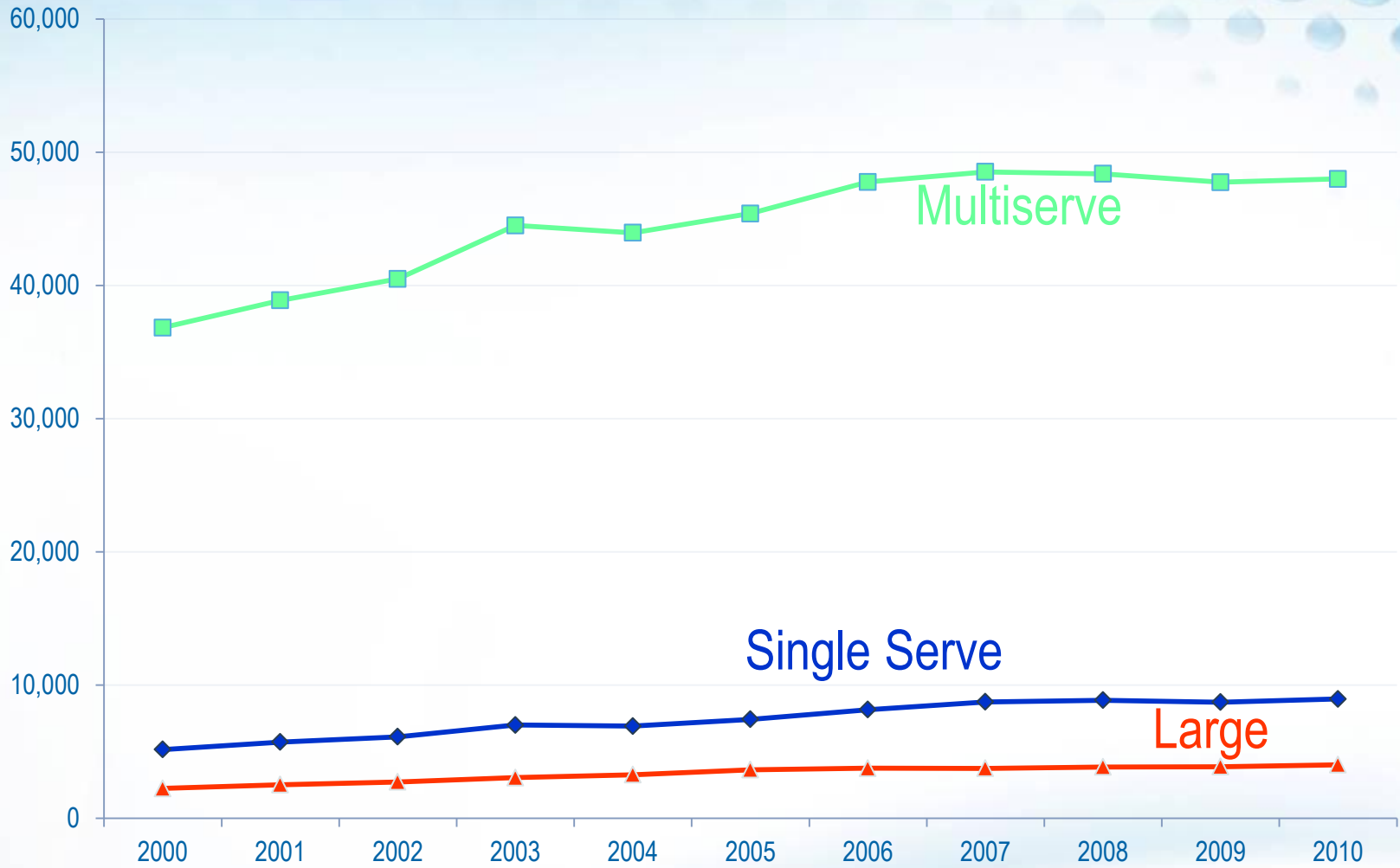
09-10 YOY Growth



# Europe – Pack Type

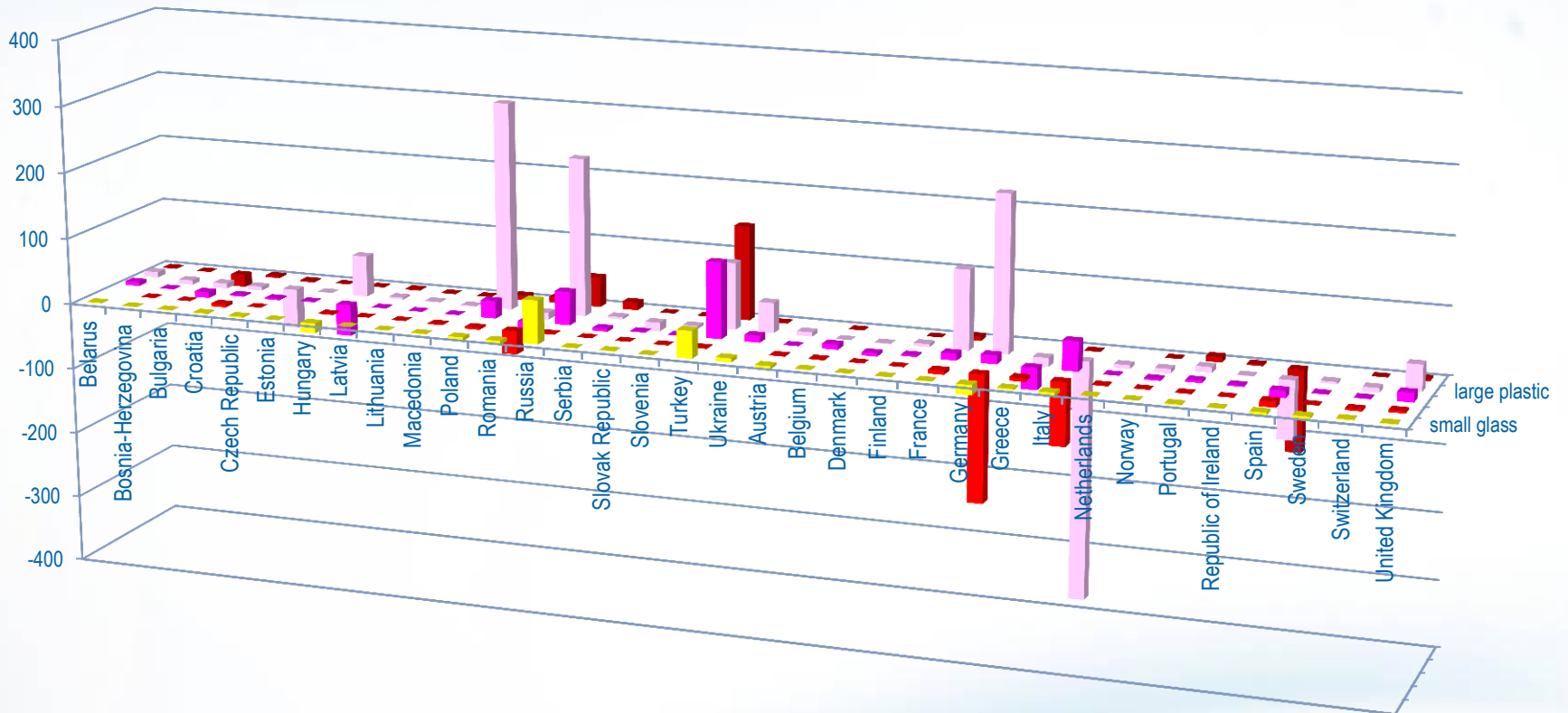


# Europe – Pack Size



# What's Up, What's Down

## 09-10 YOY Growth

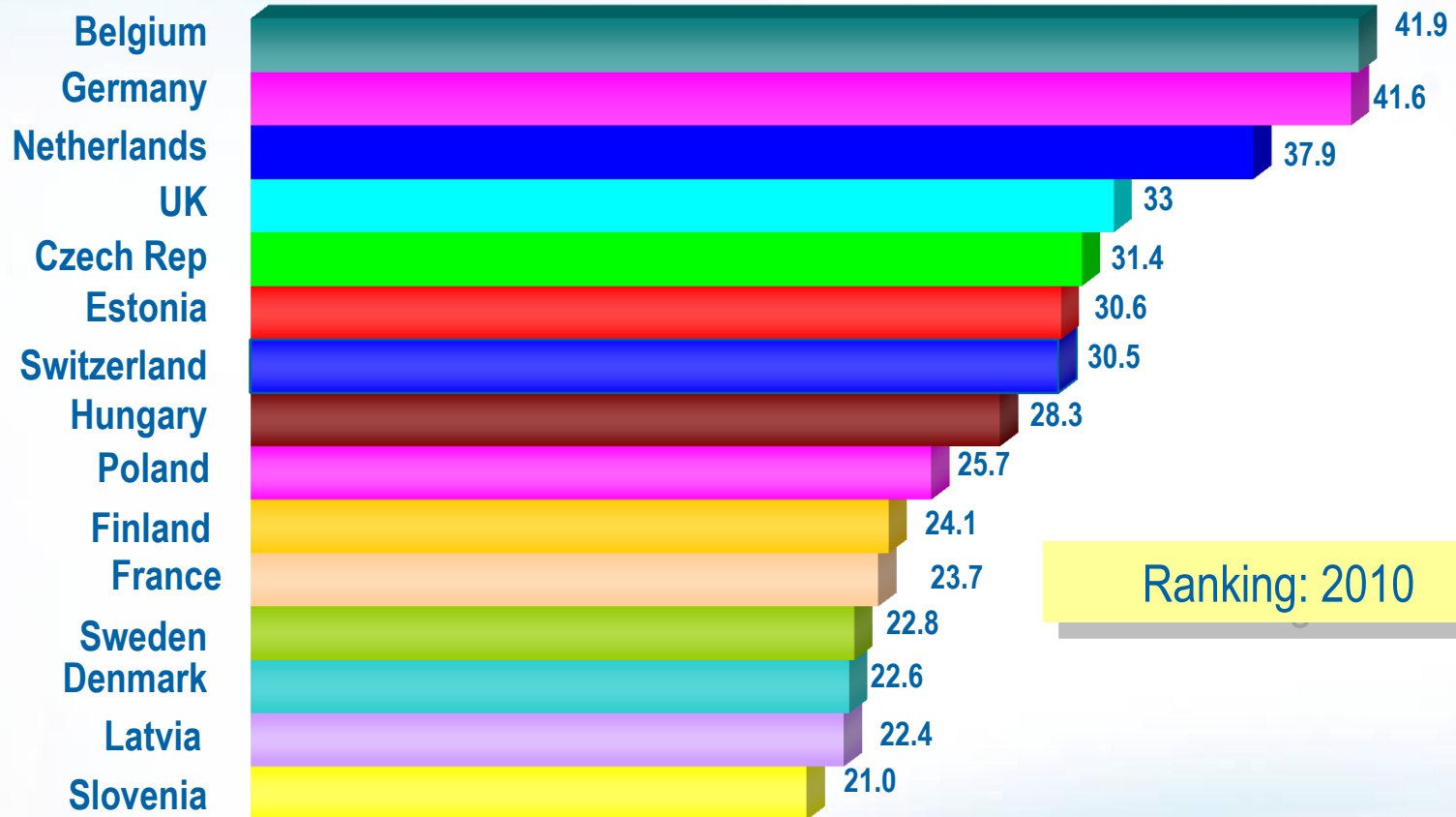


# Europe – Private Label Share



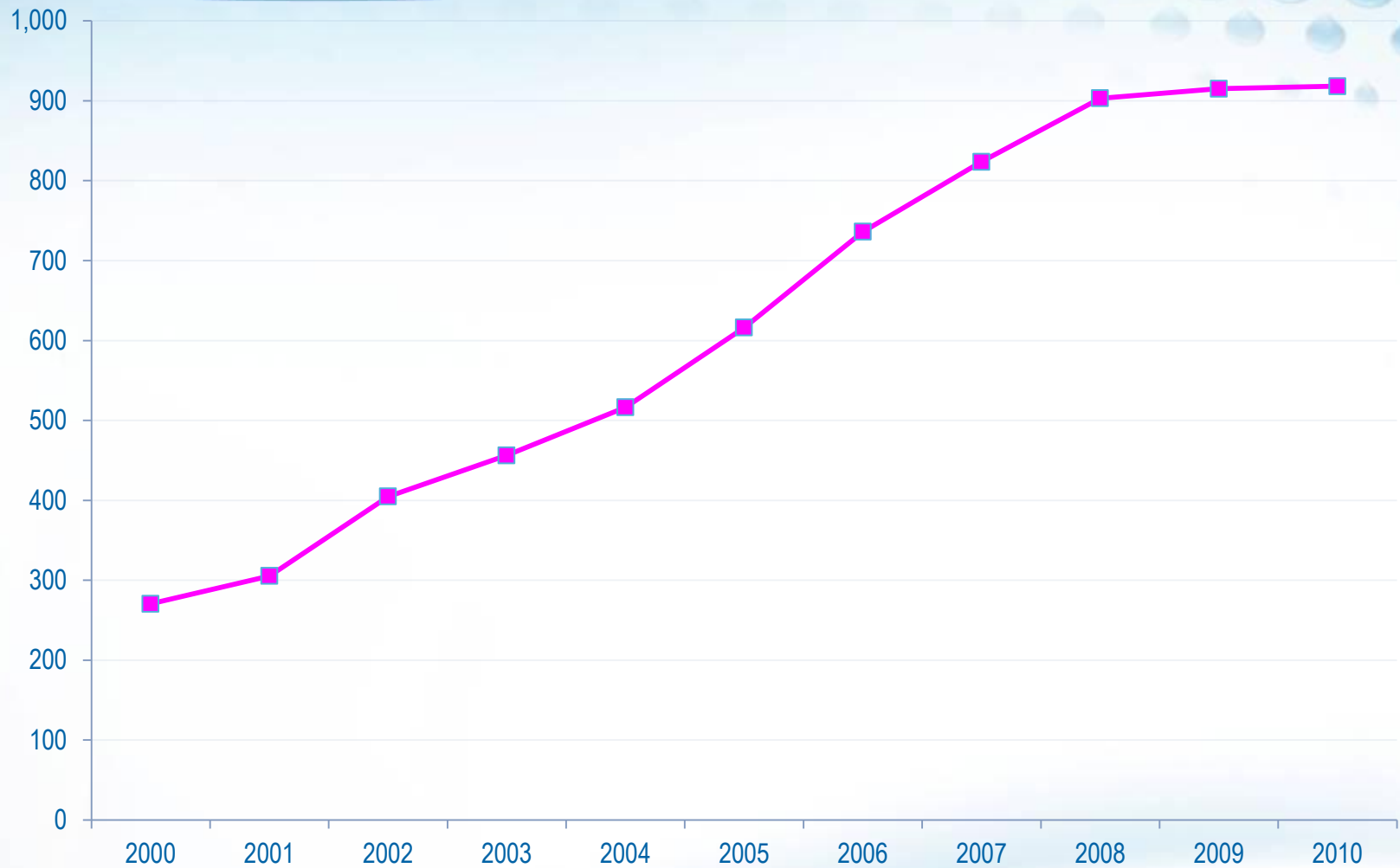
# Top 15 Private Label Markets – Europe, Bottled Water

European Average PL share: 19.9%

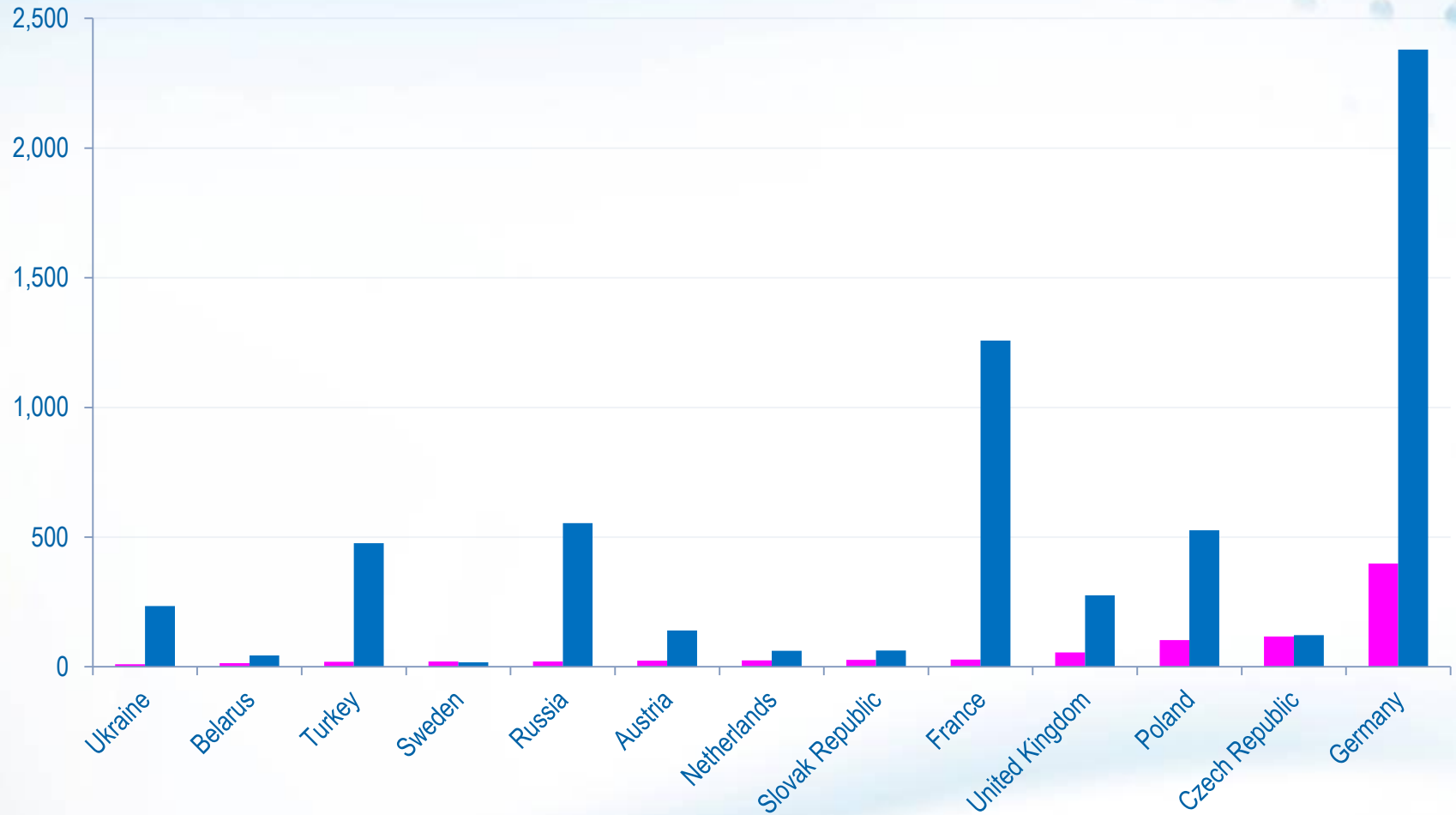


Ranking: 2010

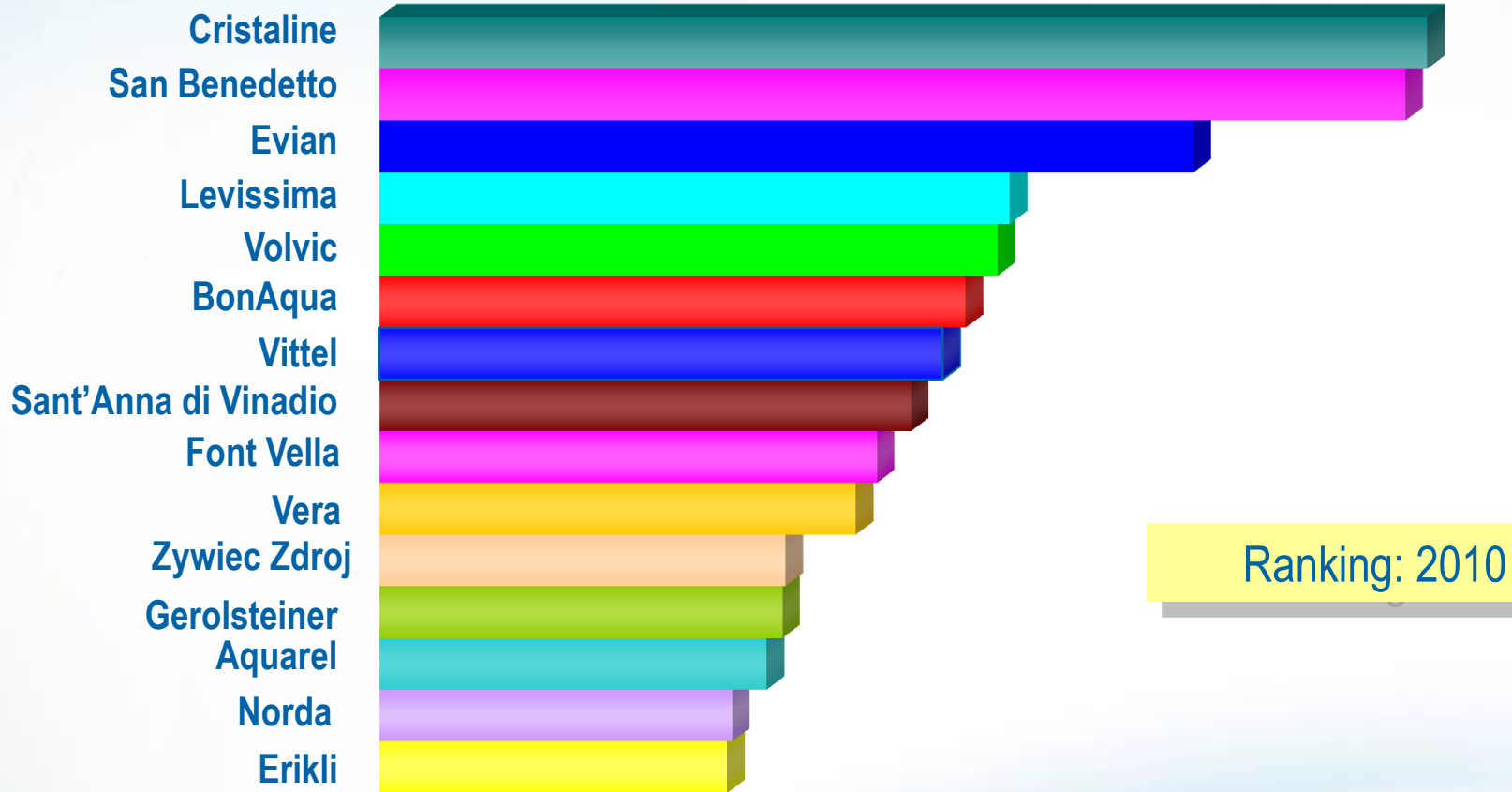
# Europe – Flavoured Water



# Plain Water & Flavoured Water

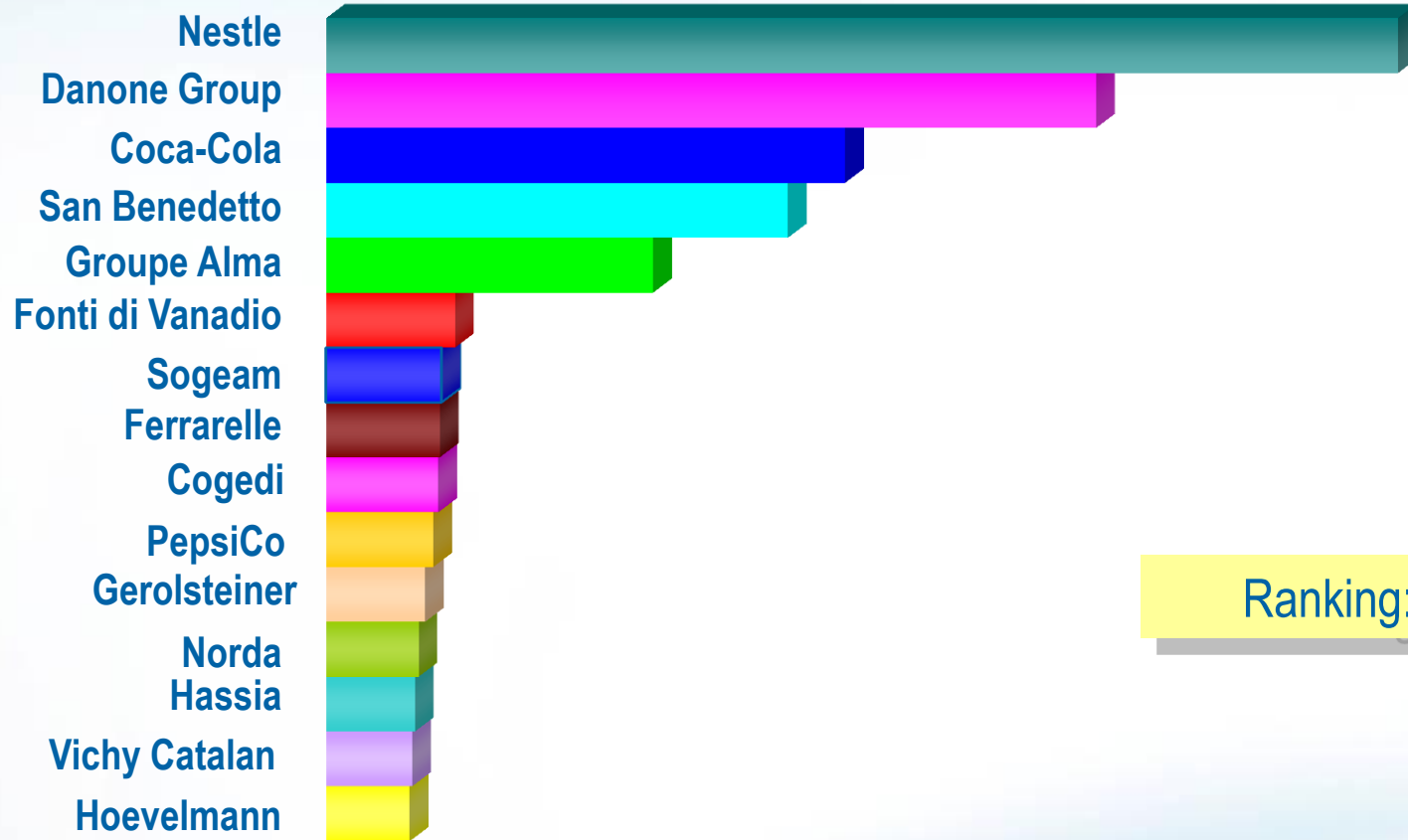


# Top 15 Brands – Europe, Bottled Water



Ranking: 2010

# Top 15 Brand Owners – Europe, Bottled Water



Ranking: 2010

# Who is Where

