

## Appendix 3

### Consumption of Non-alcoholic Beverages in the EU

## EU NON-ALCOHOLIC BEVERAGES CONSUMPTION

### Definitions

|                                    |  |
|------------------------------------|--|
| <b>Soft drinks</b>                 | <b>5 main soft drink sectors as set out below</b>  |
| - bottled water                    | Still; sparkling; natural mineral water; spring water; purified water; table water; packaged water in sizes < 10 litres; water coolers >10 litres    |
| - carbonates                       | Ready to drink including draught dispense; cola; clear flavoured waters with sweetening; flavoured carbonates; mixers; shandy; energy drinks         |
| - dilutables                       | Squashes, cordials, powders and other concentrates for dilution to taste by consumer; expressed as consumed/ready to drink in million litres         |
| - fruit juice/nectars              | Fruit juice (100% juice); nectars (25-99%); freshly squeezed; not from concentrate; other chilled from concentrate; long life; all uncarbonated      |
| - still drinks                     | Juice drinks (5-25% juice); other still drinks (0-5% juice) including iced tea, non fruit drinks, sports drinks (excluding protein enriched formats) |
| <b>Hot drinks</b>                  | <b>3 main sectors as set out below</b>   |
| - Tea                              | Black tea; oolong tea; green tea; white tea; herbal/fruit infusions; ready to drink volume   |
| - Coffee                           | Roasted; ground; freeze dried; ready to drink volume   |
| - Other hot beverages              | Malt drinks; barley drinks; others; ready to drink volume  |
| <b>Soy &amp; protein beverages</b> | Soy milk; flavoured soy drinks; soy & fruit; soy shakes; drinks with added protein; all ready to drink products only (excludes powders, etc.)        |
|                                    | (Soy & protein beverages data for 14 West Europe countries only)   |

### Total European consumption by sector

| Data                  |                              | 2000            | 2001            | 2002            | 2003            | 2004            | 2005            | 2006            | 2007            | 2008            | 2009            | 2010            |
|-----------------------|------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| <b>Soft drinks</b>    | <b>EU volume, mln litres</b> | <b>95605.0</b>  | <b>99568.0</b>  | <b>103020.0</b> | <b>110046.0</b> | <b>107611.0</b> | <b>109891.0</b> | <b>112247.0</b> | <b>114708.0</b> | <b>117132.0</b> | <b>119656.0</b> | <b>122420.0</b> |
| - bottled water       | EU volume, mln litres        | 39887.0         | 42154.0         | 44227.0         | 48799.0         | 46983.0         | 48114.0         | 49482.0         | 51002.0         | 52636.0         | 54386.0         | 56295.0         |
| - carbonates          | EU volume, mln litres        | 33165.0         | 33891.0         | 34278.0         | 34930.0         | 33817.0         | 34037.0         | 34078.0         | 34310.0         | 34386.0         | 34469.0         | 34558.0         |
| - dilutables          | EU volume, mln litres        | 7259.0          | 7363.0          | 7529.0          | 7751.0          | 7668.0          | 7658.0          | 7913.0          | 7943.0          | 7971.0          | 7979.0          | 7981.0          |
| - fruit juice/nectars | EU volume, mln litres        | 9677.0          | 10095.0         | 10308.0         | 10930.0         | 10921.0         | 11239.0         | 11465.0         | 11659.0         | 11845.0         | 12019.0         | 12202.0         |
| - still drinks        | EU volume, mln litres        | 5617.0          | 6065.0          | 6678.0          | 7636.0          | 8222.0          | 8843.0          | 9309.0          | 9794.0          | 10294.0         | 10803.0         | 11384.0         |
| <b>Hot drinks</b>     | <b>EU volume, mln litres</b> | <b>85285.0</b>  | <b>84993.0</b>  | <b>86292.0</b>  | <b>86661.0</b>  | <b>86458.0</b>  | <b>86736.0</b>  | <b>86950.0</b>  | <b>87064.0</b>  | <b>87144.0</b>  | <b>87200.0</b>  | <b>87256.0</b>  |
| - Tea                 | EU volume, mln litres        | 30234.0         | 30191.0         | 30847.0         | 30771.0         | 29952.0         | 30009.0         | 30097.0         | 30147.0         | 30194.0         | 30236.0         | 30278.0         |
| - Coffee              | EU volume, mln litres        | 51987.0         | 51666.0         | 52228.0         | 52588.0         | 53123.0         | 53270.0         | 53317.0         | 53310.0         | 53272.0         | 53215.0         | 53158.0         |
| - Other hot beverages | EU volume, mln litres        | 3064.0          | 3136.0          | 3217.0          | 3302.0          | 3383.0          | 3457.0          | 3536.0          | 3607.0          | 3678.0          | 3749.0          | 3820.0          |
| <b>Subtotal</b>       | <b>EU volume, mln litres</b> | <b>180890.0</b> | <b>184561.0</b> | <b>189312.0</b> | <b>196707.0</b> | <b>194069.0</b> | <b>196627.0</b> | <b>199197.0</b> | <b>201772.0</b> | <b>204276.0</b> | <b>206856.0</b> | <b>209676.0</b> |
| <b>Soy beverages</b>  | <b>WE volume, mln litres</b> | <b>69.0</b>     | <b>112.0</b>    | <b>148.0</b>    | <b>185.0</b>    | <b>245.0</b>    | <b>310.0</b>    | <b>373.0</b>    | <b>427.0</b>    | <b>482.0</b>    | <b>533.0</b>    | <b>588.0</b>    |
| <b>Total</b>          | <b>volume, mln litres</b>    | <b>180959.0</b> | <b>184673.0</b> | <b>189460.0</b> | <b>196892.0</b> | <b>194314.0</b> | <b>196937.0</b> | <b>199570.0</b> | <b>202199.0</b> | <b>204758.0</b> | <b>207389.0</b> | <b>210264.0</b> |

Source: Zenith International

### Total European consumption by country

| Data               |                           | 2005           | 2006            | 2007            | 2008            | 2009            | 2010            | 2011            | 2012            | 2013            | 2014            | 2015            |
|--------------------|---------------------------|----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Austria            | volume, mln litres        | 3540.0         | 3515.0          | 3688.0          | 3617.0          | 3542.0          | 3562.0          | 3572.0          | 3583.0          | 3601.0          | 3622.0          | 3648.0          |
| Belgium/Luxembourg | volume, mln litres        | 4359.0         | 4501.0          | 4811.0          | 5463.0          | 5228.0          | 5287.0          | 5342.0          | 5397.0          | 5450.0          | 5501.0          | 5556.0          |
| Bulgaria           | volume, mln litres        | 1228.0         | 1274.0          | 1371.0          | 1494.0          | 1646.0          | 1784.0          | 1892.0          | 1997.0          | 2118.0          | 2255.0          | 2405.0          |
| Cyprus             | volume, mln litres        | 323.0          | 332.0           | 333.0           | 356.0           | 363.0           | 373.0           | 383.0           | 395.0           | 408.0           | 423.0           | 439.0           |
| Czech Republic     | volume, mln litres        | 3672.0         | 3895.0          | 4201.0          | 4368.0          | 4405.0          | 4571.0          | 4637.0          | 4727.0          | 4803.0          | 4882.0          | 4961.0          |
| Denmark            | volume, mln litres        | 2300.0         | 2321.0          | 2355.0          | 2277.0          | 2299.0          | 2293.0          | 2293.0          | 2295.0          | 2296.0          | 2297.0          | 2300.0          |
| Estonia            | volume, mln litres        | 378.0          | 407.0           | 434.0           | 459.0           | 493.0           | 520.0           | 544.0           | 572.0           | 594.0           | 621.0           | 646.0           |
| Finland            | volume, mln litres        | 2049.0         | 2044.0          | 2142.0          | 2159.0          | 2173.0          | 2223.0          | 2265.0          | 2296.0          | 2330.0          | 2361.0          | 2397.0          |
| France             | volume, mln litres        | 23837.0        | 24977.0         | 25477.0         | 27186.0         | 25660.0         | 25632.0         | 26070.0         | 26520.0         | 26979.0         | 27473.0         | 27985.0         |
| Germany            | volume, mln litres        | 32461.0        | 33026.0         | 34190.0         | 37134.0         | 35520.0         | 36040.0         | 36342.0         | 36665.0         | 37048.0         | 37435.0         | 37936.0         |
| Greece             | volume, mln litres        | 2095.0         | 2224.0          | 2309.0          | 2433.0          | 2571.0          | 2685.0          | 2777.0          | 2878.0          | 2990.0          | 3116.0          | 3262.0          |
| Hungary            | volume, mln litres        | 2056.0         | 2271.0          | 2453.0          | 2692.0          | 2701.0          | 2980.0          | 3135.0          | 3303.0          | 3482.0          | 3676.0          | 3887.0          |
| Ireland            | volume, mln litres        | 2198.0         | 2264.0          | 2343.0          | 2593.0          | 2556.0          | 2588.0          | 2618.0          | 2649.0          | 2682.0          | 2714.0          | 2747.0          |
| Italy              | volume, mln litres        | 21569.0        | 22140.0         | 22422.0         | 23900.0         | 23247.0         | 23186.0         | 23295.0         | 23395.0         | 23495.0         | 23604.0         | 23723.0         |
| Latvia             | volume, mln litres        | 454.0          | 499.0           | 557.0           | 586.0           | 617.0           | 643.0           | 672.0           | 703.0           | 736.0           | 767.0           | 803.0           |
| Lithuania          | volume, mln litres        | 483.0          | 538.0           | 609.0           | 634.0           | 681.0           | 723.0           | 757.0           | 789.0           | 824.0           | 858.0           | 898.0           |
| Malta              | volume, mln litres        | 187.0          | 201.0           | 220.0           | 242.0           | 244.0           | 250.0           | 258.0           | 266.0           | 273.0           | 282.0           | 289.0           |
| Netherlands        | volume, mln litres        | 5814.0         | 5939.0          | 5665.0          | 5797.0          | 5771.0          | 5723.0          | 5714.0          | 5709.0          | 5702.0          | 5703.0          | 5706.0          |
| Poland             | volume, mln litres        | 11461.0        | 11973.0         | 12453.0         | 12935.0         | 13234.0         | 13853.0         | 14325.0         | 14747.0         | 15144.0         | 15522.0         | 15902.0         |
| Portugal           | volume, mln litres        | 2505.0         | 2586.0          | 2700.0          | 2786.0          | 2844.0          | 2912.0          | 3004.0          | 3093.0          | 3188.0          | 3291.0          | 3400.0          |
| Romania            | volume, mln litres        | 2410.0         | 2601.0          | 2960.0          | 3231.0          | 3382.0          | 3635.0          | 3831.0          | 4016.0          | 4193.0          | 4382.0          | 4578.0          |
| Slovakia           | volume, mln litres        | 1076.0         | 1195.0          | 1260.0          | 1296.0          | 1270.0          | 1342.0          | 1387.0          | 1433.0          | 1482.0          | 1533.0          | 1588.0          |
| Slovenia           | volume, mln litres        | 581.0          | 615.0           | 655.0           | 695.0           | 694.0           | 716.0           | 741.0           | 766.0           | 792.0           | 819.0           | 847.0           |
| Spain              | volume, mln litres        | 13680.0        | 14054.0         | 14427.0         | 15145.0         | 15332.0         | 15949.0         | 16396.0         | 16874.0         | 17356.0         | 17876.0         | 18435.0         |
| Sweden             | volume, mln litres        | 3419.0         | 3429.0          | 3446.0          | 3433.0          | 3387.0          | 3382.0          | 3386.0          | 3393.0          | 3401.0          | 3408.0          | 3416.0          |
| UK                 | volume, mln litres        | 32444.0        | 32915.0         | 33637.0         | 33826.0         | 32957.0         | 32950.0         | 33331.0         | 33698.0         | 33955.0         | 34178.0         | 34420.0         |
| <b>Total</b>       | <b>volume, mln litres</b> | <b>17078.0</b> | <b>100949.0</b> | <b>103354.0</b> | <b>107099.0</b> | <b>106216.0</b> | <b>107852.0</b> | <b>109715.0</b> | <b>111531.0</b> | <b>113223.0</b> | <b>114937.0</b> | <b>116752.0</b> |

Source: Zenith International

Note: numbers may vary due to rounding