Beer Market Insights

El Salvador

2013 Cycle

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**Wisdom Databases and Reports available from Canadean Beverages in 2013:**

**Beer Country Market Insight Reports and Wisdom Databases**

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In addition to above reports, top line data is also available for another 111 countries.

(1) Cider Market Insight Reports and Wisdom Databases also available. Cider data also available for New Zealand and South Africa.

(2) Includes data on: Antigua, Aruba, Bahamas, Barbados, Belize, Cuba, Curacao & others, Dominica, Dominican Republic, Grenada, Guadeloupe, Guyana, Haiti, Jamaica, Martinique, Puerto Rico, St Kitts, St Lucia, St Vincent, Suriname, Trinidad.

**Other products available from Canadean Beverages include:**

- Global Beer Trends – Excel Report
- Global Brewer Analyser – Excel Report
- Global Beverage Forecasts
- Quarterly Beverage Tracker
- Consumer Trends in Beer, Cider & Pre-mixed Spirits
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<th>Type</th>
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<td>Others</td>
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<td>Dark Beer</td>
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<tr>
<td>Stout</td>
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SOURCE: Trade Interviews, Canadean

### Table 2: Beer Consumption by Geographic Scope, 2009-2013F

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SOURCE: Trade Interviews, Canadean

### Table 3: Beer All Trademarks, 2008-2012

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<td>Other Private Label</td>
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SOURCE: Trade Interviews, Canadean
### Table 4: Beer Trademark Owners, 2008-2012

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<th>Player</th>
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<th>% Share 2008</th>
<th>000 HL 2009</th>
<th>% Share 2009</th>
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SOURCE: Trade Interviews, Canadean

### Figure 1: Beer Leading Brewers/Importers, 2012

SOURCE: Canadean Wisdom
Section 4 Brewer Profiles

COMPANY - 1

Address
Tel:          Fax:
www.

OWNERSHIP/SHAREHOLDERS
Text

COMPANY HISTORY
Text

STRATEGIC INFORMATION
Text
### COMPANY DATA

**Table 5: Breweries Capacity (000s HL)**

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**Table 6: Full Brand List**

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<th>Segment/Brand</th>
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**Table 7: Brand Volumes 2008-2012**

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<td>2012</td>
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</table>

| Total         |        |         |         |         |
| Brand 1       |        |         |         |         |
| Brand 2       |        |         |         |         |
| Others        |        |         |         |         |

**Source:** Trade Interviews, Canadean
Research Methodology

Canadean Expertise

Canadean has long held a reputation with FMCG companies for providing specialist business information by conducting detailed industry and consumer research, supported by insightful value-added analysis. We cover the entire spectrum of the consumer value chain from suppliers, brand owners, distribution channels and consumer insights analysis.

In relation to our beverage services, Canadean Ltd is recognized as the beverage information specialist with nearly 40 years of experience in the commercial beverage markets. Our dedicated in-country researchers and analysts have an industry background in marketing, market research, consulting and advanced statistical expertise. They are well positioned in the industries themselves and therefore, best placed to ask the right questions of the right people. This network of professional researchers stretches across more than 80 countries, enabling Canadean to conduct unique research via our trusted business communities.

Research Methodology

Our research methodology sets us apart from the competition. The key strength of our methodology is that we work in industry partnerships across the value chain, from suppliers to brand producers and both on- and off-premise channels. Our research is built from brand data upwards. This ‘brick-by-brick’ approach as well as the cross-fertilization with our other related services, ensures that our research has an internal logic which cross-checks from all angles - from brand volume through to corporate volume, flavour segmentation, packaging splits and channel distribution.

The companies featured in the company profiles and those whose brands are featured in the individual market categories are selected through regular market observation (see also our Quarterly Beverage Tracker) based on the size of their output and/or their dynamism.

Sources

- Face-to-face interviews with the leading soft drinks producers, brewers, dairy, spirits and wine producers
- On-going dialogue with leading companies in allied industries
- Quarterly monitoring of product offered in all trade channels in selected markets
- Interviews with retailers and other distributors
• Company information in the public domain
• Trade press
• Trade associations
• Official production and trade statistics

**Canadean Wisdom Database**

All our annual reports are held in Canadean's investigative multi-dimensional, attribute-based database, Wisdom, available as a web-based service or as 3-dimensional excel cub files, offering unique advantages to our clients, in particular:

- A high degree of standardization across all markets
- The ability to view the data in a flexible way, rather than what has been predetermined in a report table
- The ability to conduct investigative analysis of the data by single attribute leading to insights and understanding
- The ability to run calculations
- The ability to access the database at different levels – Wisdom Direct for everyday/infrequent use or Wisdom Analytics for the experienced user requiring a greater level of data and analytical functionality

**Interactive Intelligence**

Our latest on-line subscription service, Interactive Intelligence, allows clients to access their pdf reports faster and with greater flexibility. Powerful one click tools provide a range of unique features, including:

- The ability to search across the full text of all reports subscribed to
- The ability to select and copy presentation-ready tables and graphics
- The ability to create bespoke reports by selecting and copying specific sections
- Nine language translation tool

**Confidentiality**

In recognition of the high degree of sensitivity implied by the research within the industry, we operate with due care and consideration to our clients’ data. Although we have extensive contacts built over the considerable length of time we have been operating in the field, we do not disclose the identity of our sources.

All our Staff and Clients are requested to sign a Confidentiality Agreement, which ensures that the more sensitive data is never circulated outside the Client Base and the Industry.
Beer & Cider Attribute Definitions Listed Alphabetically

**Alcoholic Strength:** This is the percentage Abv for a brand. The range is:

- \( \geq 0.0\% \) - \( \leq 0.5\% \)
- \( >0.5\% \) - \( \leq 3.0\% \)
- \( >3.0\% \) - \( \leq 5.5\% \)
- \( >5.5\% \) - \( <9.9\% \)
- \( \geq 10.0\% \) - \( <16.0\% \)

These bands do not apply to beer or cider:

- \( \geq 16.0\% \) - \( <30.0\% \)
- \( \geq 30.0\% \) - \( <46.0\% \)
- \( \geq 46.0\% \) - \( \leq 100.0\% \)

**Beer & Cider Types:**

**Beer**

- Ale: A top-fermented beer, usually amber in colour, sold primarily in the British Isles. Versions of Ale are also known as Bitter, Mild, Brown Ale. Light Ale and IPA. 0-10% Abv
- Beer Mixes: Beer mixed with soft drinks, usually lemonade or cola. Includes Shandy, Panache, Radler and Biermixgetranke.
- Flavoured Beer: Defined as a normal strength beer with added flavours, often fruit or spirits. Includes brands such as Desperados
- Lager: Accounts for over 90% of all beer sold worldwide, Bottom fermented, blond in colour. Also often labelled as Pilsner or Pils, although there is no legal definition of these terms
- Other Top Fermented Beers: Encompasses all other top-fermented beers ie non-lager beers. Includes Altbier and Kolsch in Germany, and Abbaye, Trappiste, Gueze, Lambic and other special beers in Belgium
- Others: Composition of this sub-category will vary widely from market to market and includes specialty lagers, usually dark in colour and strong in alcohol. Also includes seasonal (eg Christmas or Easter) beers
- Stout: A top-fermented beer, usually very dark, or black in colour and most popular in Ireland and the UK, although Stout is found in all regions of the world. 2-7.5% Abv
- Wheat Beer: A top-fermented beer, made using wheat, rather than barley malt. can be cloudy ('white') or blonde in colour. Also known as Weissbier, Weizen, Witbier

**Cider**

- Apple cider: cider made from fermenting apples and unflavoured with any other fruit. Apple and pear blends however will be considered as apple.
- Pear cider: cider made from fermenting pears and unflavoured with any other fruit. Sometimes known as perry. Excludes pear ciders that are positioned as ersatz wine (eg Babycham, Lambrini, etc.).
- Flavoured cider: cider made from apples or pears but with other fruit flavours added.

**Brand:** See Trademark Brand

**Brand Owner:** See Trademark Owner

**Brewed In:** indicates the country where the product is brewed as a domestic brand or under license.

**Category:** See Product Definitions for full definitions of all beverage categories

Beer & Cider
- Beer
- Cider
- Sorghum Beer
- Soft Drinks
- Spirits
- Wine
Calorie Rating: indicates relative calorie content. The product must be specifically marketed as a low calorie beer or cider. Light beers are often, but not always low calorie. See Product Definitions. Options are:
- Low
- Regular

Country of Origin: This is the brand country of origin, irrespective of where the brand is actually brewed. For example the Country of Origin for Carlsberg will always be Denmark, even though the brand may not actually be produced in Denmark.

Distribution:

Off-premise: Volume sold for ‘subsequent consumption’ away from the place of purchase, comprising:
- Modern Retail:
  - Large Modern: Supermarkets, hypermarkets, department stores (Karstadt): modern facilities, typically with electronic tills, barcode scanning and multiple checkout
  - Convenience: Stores such as 7-11, petrol/gas station outlets - typically small food stores with long opening hours, often selling ready meals and fast food
  - Discount: Hard discounter stores, such as Lidl and Aldi, where focus is on low pricing
  - Traditional Retail: Traditional food stores: ‘mom & pop’ style, CTNs (confectioners, tobacconists, newsagents), delis, pharmacies/drugstores. Street stalls and kiosks (not for immediate consumption)
  - Specialist Beverage Retailer: Off-licenses, liquor stores, specialist drinks shops
  - Home Delivery: On-line/telephone/mail order, deliveries to home address

On-premise: Volume sold for ‘immediate consumption’ at the place of purchase, comprising:
- Vending: Automatic merchandising machines selling (usually) branded beverages.
- QSR: Quick Service restaurants and fast food restaurants. Payment is made prior to consumption. Typically informal surroundings with seating and minimal or usually no table service. Either an independent self-service or fast food outlet, or part of a chain eg motorway services or fast food chain eg McDonalds. Includes snack bars, sandwich shops, cafes and self-service cafes/restaurants in retail outlets.
- EDA Places (Eating, Drinking & Accommodation) / Horeca:
  - Eating: establishments where beverage consumption is generally an accompaniment to a meal and full waiting service is provided. Payment is made after consumption
  - Drinking: establishments primarily engaged in the sale of drinks for consumption on premise. Including bars, clubs, pubs, nightclubs, private/member social clubs
  - Accommodation: establishments where the primary function is to provide accommodation facilities. Including hotels, motels, hostels, camp sites, caravan sites, holiday parks, B&Bs, guest houses, pensions, chalets. Includes meetings, conferences and conventions held in hotels/motels
- Institutions: Such as workplaces, hospitals, medical centres, nursing homes, schools, universities, prisons, military.
- Other On-premise: Such as street stalls and kiosks (including mobile equipment), travel and transport (on board domestic rail, air, sea, coach/bus), leisure (including cinemas, theatres, gyms/health clubs, stadiums, museums/galleries etc) and special/one-off events.

Geographic Scope: is whether the product is a local brand (only sold in a particular locality), a national brand or an international brand (imported or licensed). Options are:
- International
- Local
- National

Geography: allows for selection either globally or by region or individual country.

Local Operator: is defined as the company who is locally responsible for the brand eg Sinebrychoff is the local operator (l/o) for the Guinness brand in Finland.
Local Segment: This is how the beer is classified locally and is often allied to the tax structure. Some examples are:

- Class I/Class II/Class III Beer (Sweden)
- Corriente/Especial (Spain)
- Speciale/Luxe (France)
- Pilsner/Export/Hell (Germany)
- Double Malt (Italy)
- Popular/Light/Malt Liquor (USA)

Modus Operandi: Determines whether the product is a domestic brand, imported or produced under licence in your country. Options are:
- Domestic
- Imported
- Licensed

Pack Material: is the principal material used to construct the pack. See Packaging Definitions for a full list of pack materials covered. Options include:
- Glass
- Metal
- PET

Pack Type: See Packaging Definitions for a full list of pack types covered. Options include:
- Barrel
- Bottle
- Can
- Keg

Pack Size: is a number representing the size of the pack given in centilitres or grams

Price Segment: Taking the leading brand in the most popular pack type as the standard (=100), all other brands are indexed against this brand/pack type. Brands which have an index of 110-150 are taken to be premium, while those that have an index in excess of 150 are counted as superpremium. Brands that have an index that falls below 90 are classified as discount brands, while mainstream brands fall into the 90-109 band. Options are:
- Discount
- Mainstream
- Premium
- Superpremium

PL Indicator: indicates whether a brand is a Private Label (distributors’ own brand/DOB/retailers’ own brand). Options are:
- Branded
- PL

Refillable Indicator: This indicates whether a pack is refillable or not. Options are:
- Refillable
- Non Refillable

Trademark Brand: Trademark brands are the word or words that are the property of an individual company.

Trademark/Brand Owner: is defined as the ultimate owner of the trademark brand eg Diageo is the trademark or brand owner (t/m) of Guinness brand.
Product Definitions

Beer

Fermented alcoholic beverages - typically, but not exclusively made from malt - to which hops have been added. Includes:

Lager

Bottom fermented beer, usually blond in colour. 0-10% Abv. Accounts for over 90% of all beer sold worldwide. Also often labelled as Pilsner or Pils, although there is no legal definition of these terms.

Ale

A top-fermented beer, usually amber in colour and sold primarily in the British Isles. Versions of Ale are also known as Bitter, Mild, Brown Ale, Light Ale and IPA. 0-10% Abv.

Stout

A top-fermented beer, usually very dark, or black in colour and most popular in Ireland and the UK, although Stout is found in all regions of the world. 2-7.5% Abv.

Wheat Beer

A top-fermented beer, made using wheat, rather than barley malt. Can be cloudy ('white') or blonde in colour. Also known as Weissbier, Weizen and Witbier.

Other Top Fermented Beers

Encompasses all other top-fermented (ie non-lager) beers. Includes Altbier and Kolsch in Germany and Abbaye, Trappiste, Gueze, Lambic and other special beers in Belgium.

Beer Mixes

Beer mixed with soft drinks, usually lemonade or cola. Includes Shandy, Panache, Radler and Biermixgetranke. Canadean only collects data on pre-mixed beer mixes. Considerable volumes of beer mixes are postmix (made at point of dispense eg shandy in the UK) and such volumes are not included.

Flavoured Beer

Flavoured beer is defined as a normal strength beer with added flavours, often fruit, or spirits (eg Tequila). Does not include beer mix drinks.

Others

Speciality lagers, usually dark in colour and strong in alcohol. Composition of this sub-category will vary widely from market to market. Also includes seasonal (eg Christmas or Easter) beers.
Low Calorie Beer
The beer must be specifically marketed as a low calorie beer. Light beers are often, but not always low calorie. The exceptions are brands such as Chang Light and Singha Light in Thailand which suggest that they are low calorie, but due to the high alcohol content are in fact very close to regular versions of the brands.

BEER DEFINITION BY ALCOHOLIC STRENGTH
Although most beer market have some form of local segmentation based upon alcoholic strength, the lack of consistency in definitions and category boundaries makes international comparison very difficult. In order to facilitate international analysis of the beer market by alcoholic strength Canadean has created a standard strength segmentation:

- No alcohol - Less than or equal to 0.5% Abv
- Low alcohol -0.6-3.0% Abv
- Standard strength -3.1-5.5% Abv
- Strong beer - 5.6% Abv and above

BEER DEFINITION BY PRICING
The task of defining positioning is both a difficult and contentious issue. Canadean believes that a focus on price is ultimately the most reliable definition as it is objective and there is a direct correlation between positioning and profitability.

Taking the leading brand in the most popular pack type as the standard (=100), all other brands have been indexed against this brand/pack type. Brands which have an index of 110-150 have been taken to be premium, while those brands which have an index in excess of 150 are counted as super premium. Brands which fall below an index of 90 form the value or discount segment, while the mainstream segment is formed of brands which fall into the 90-109 band.

BEER DEFINITIONS BY PROVENANCE/AVAILABILITY - LOCAL/NATIONAL/INTERNATIONAL
Beer brands often have their own competitive set based upon their provenance and availability. Canadean segments the beer market into three categories:

- **Local** - brands which do not have national distribution or where a significant proportion of the brand volume is derived from a particular region. 'Region' does not have to be a defined administrative area. It is assumed that the bulk of volume included in 'others' will fall into this category
- **National** - domestic brands which have national distribution and where there is no significant volume skew to a particular region
- **International** - brands which originate outside the country. Maybe imported or produced under licence. Excludes domestic brands which are packaged in another country and then re-imported

Sample Pages
Soft Drinks

Packaged Water

Caveat: Category volumes may include an element of double counting where packaged water is used to dilute squash/syrups or powdered drinks.

All potable water including water with or without added flavourings and minerals/vitamins, but without sugar/sweeteners, sold in large containers of up to and including 10 liters.

Still Water

Non-carbonated unsweetened mineral, spring or table water, with or without added flavourings and vitamin/mineral enhancement.

Carbonated Water

Carbonated unsweetened mineral, spring or table water, including low-carbonation waters, either naturally carbonated or which have been rendered carbonated by the injection of carbon dioxide, including 'low carbonation' waters. Includes carbonated water with and without added flavourings and vitamin/mineral enhancement.

Water Source

- **Mineral Water**: Packaged water from a named underground source officially certified as mineral and displaying the word ‘mineral’ on its label. The category includes products which make specific therapeutic or medicinal claims. No processing or treatment is allowed other than filtration and the introduction or reintroduction of carbon dioxide. The addition of extra minerals or vitamin enhancements is not permitted. Must be bottled at source.

- **Table Water**: Potable packaged water which may have been rendered potable by processing. May come from more than one source and may include tap water or be transported from the source to the bottling plant. The addition of minerals and/or vitamin enhancements is permitted. (Note: In China and in the Baltics, mineralized water ie table water with minerals added is sold as a cheaper alternative to mineral water)

- **Spring Water**: Naturally occurring pure water derived from a single underground water table or deposit. Treatment may include filtration and/or decantation, and the injection of carbon dioxide. Water labelled as ‘spring water’ must be bottled at source. In the UK spring water can only be tankered to the bottling plant if this was the practice before 23 November 1996; the right to tanker is linked to the spring not to the bottler. The addition of minerals and/or vitamin enhancements is not permitted.

Flavoured Water

Packaged water which has been flavoured by the addition of essences and/or aromatic substances but which does not contain sweetening agents (flavoured sweetened waters are included in carbonates if carbonated and in still drinks if non-carbonated).
Bulk/HOD Water

Caveat: Category volumes may include an element of double counting as bulk/HOD water (HOD = Home and Office Delivery) is sometimes used in the preparation of hot beverages, most typically tea. While the boiling of water for tea may be expected to render the water ‘safe’ there are markets where there can be especially bad contamination (either of taste or by chemicals) which drives consumers to use bulk water or even packaged water. This is most marked in countries where tea is particularly delicate (eg Turkey, China, Japan), or the quality of water supply is poor (eg Indonesia, Philippines). Bulk water or packaged water may also be used in the preparation of rice for the same reasons (eg South Korea).

There may also be some double counting where bulk/HOD water is used to dilute squash/syrups or powdered drinks.

Potable water sold in packs of over 10 litters for use in dispensers. Includes water bottled on site for use in Horeca outlets, in containers greater than 10 litters.

Tap Water

Piped water drawn from a tap or POU system (point of use). Estimated average human consumption of fluid is of the order of 2 litters/day, but varies according to geography and climate. Tap water consumption is not included in Canadean data.

Carbonates

Sweetened, non-alcoholic drinks containing carbon dioxide.

Excludes carbonated tea-based and coffee-based products (included in iced/rtd tea drinks and iced/rtd coffee drinks respectively) and carbonated sports drinks and energy drinks.

Includes syrups for home carbonated soft drinks dispensers eg Sodastream (dilution 1 + 9) and out of home fountain syrups (expressed in rtd volume).

Includes carbonated juice (eg Appletiser), carbonated nectars and products such as Schorle, Mineralwasser Plus and Gespritzte Fruchtsaefte), regardless of juice content (see Local Product for definitions).

Includes sweetened water-based carbonated flavoured drinks (eg Perfectly Clear) and gaseosa.

Juice

100% pure fruit juice or vegetable juice with no added ingredients, except permitted minerals and vitamins for the purpose of fortification and permitted additives.

Sweetening agents with less than 2% moisture (sucrose, dextrose anhydrous, glucose and fructose) may be added; syrups (liquid sucrose, invert sugar solution/syrup, fructose syrup, liquid cane sugar, isoglucose and high fructose syrup) may only be added to juice from concentrate/concentrated fruit juice. In April 2012 the EU approved new legislation banning the addition of sugar to fruit juice. A transitional period is in force; by the end of October 2013 all juices marketed in the EU, irrespective of origin, may not contain sugar. Products placed on the market or labelled before the end of October 2013 may be marketed until 28 April 2015.

If flavours or colouring from sources other than the reconstituted fruits are included the product cannot be categorized as a juice regardless of juice content. May contain pulp and cells from the same kind of fruit.

Includes products:
- **from concentrate** - the fruit/vegetable is squeezed and concentrated through evaporation of natural water content by evaporators, before being frozen and shipped to the country for use for packaging. The product is then reconstituted to its original strength by addition of the same amount of water.

- **not from concentrate** - the fruit/vegetable is squeezed in the country of origin, lightly pasteurized and frozen or aseptically packed for shipment to where it will be sold. Includes Made on the Spot (MOS) freshly squeezed juice in countries where this volume is tracked (see also Made on the Spot heading).

- **chilled** - relates to products that are distributed and sold via the chilled distribution chain. These products will be marketed and positioned as chilled products and will usually be perceived by consumers as requiring chilling (although this may or may not be technically necessary).

- **ambient** - relates to products that are distributed and marketed via an ambient distribution chain. Note, these products may be placed in chillers at the point of sale, eg in convenience stores because consumers prefer to purchase a chilled beverage, but would not usually be perceived as needing to be chilled.

- **frozen concentrated juice** (expressed in ready to drink volume) - where the reconstituted product conforms to the definition of juice above.

**Excludes** carbonated juice (included in carbonates).

### Nectars

Diluted fruit/vegetable juice and pulp, to which sweetening agents (eg sugar, honey, syrups and/or sweeteners) need to be added for the purposes of production, permitted minerals and vitamins for the purpose of fortification and permitted additives may be added. As part of the EU’s new directive in April 2012 banning the addition of sugar to fruit juice, the legislation states that nectars containing sugar or sweeteners can no longer carry the nutritional claim on the labelling ‘with no added sugar’. A transitional period is in force; by the end of October 2013 nectars marketed in the EU, irrespective of origin, may not carry the claim. Products placed on the market or labelled before the end of October 2013 may be marketed until 28 April 2015.

If flavours or colouring from sources other than the reconstituted fruits are included the product cannot be categorized as a nectar regardless of juice content. May contain pulp and cells from the same kind of fruit.

Whilst juice content is required to be equal to or in excess of 25% by volume, minimum juice content varies according to the fruit in question. Includes products from concentrate and not from concentrate (see definition under Juice), chilled and ambient products (see definition under Juice).

**Excludes** concentrates which when reconstituted conform to the definition of nectars above; these are included in squash/syrups.

**Excludes** carbonated products such as Schorle, Mineralwasser Plus, carbonated nectars and products such as Gespritzte Fruchtsaefte (included in carbonates).

### Still Drinks

Flavoured ready to drink, non-carbonated products, which may be fruit or non-fruit flavoured and have a juice content of 0-24.9%. Sugar, artificial flavouring and colouring may be added.

**Excludes** non-carbonated tea-based and coffee-based products (included in iced/rtd tea drinks and iced/rtd coffee drinks respectively) and non-carbonated sports drinks and energy drinks.

**Includes** sweetened non-carbonated water-based flavoured beverages (eg Coca-Cola’s Glaceau Vitaminwater).
Squash/Syrups

Non-ready-to-drink (non-rtd) products, marketed as concentrates for home consumption. The category includes fruit and non-fruit based products and flavours. All market figures shown in our database and reports are expressed in ready to drink (rtd) volumes. Dilution ratio varies from country to country.

Excludes syrups for home and commercial carbonated soft drinks dispensers eg Sodastream (included in carbonates).

Includes concentrates which when reconstituted conform to the definition of nectars above.

Includes syrups used for flavouring eg Monin.

Fruit Powders

Non-ready-to-drink (non-rtd) products in powder form. All market figures shown in our report are expressed in ready to drink (rtd) volumes. Powdered drinks dilution ratio varies from brand to brand. Excludes powdered tea and coffee-based drinks (included in iced/rtd tea drinks and iced/rtd coffee drinks respectively) and powdered sports drinks and energy drinks (included in sports drinks and energy drinks respectively).

Includes ‘almost rtd (dosage)’ products (see Local Product definition) where a fruit powder portion is sold together with a water serving eg Cedevita Go in East Europe.

Iced/Rtd Tea Drinks

Carbonated and non-carbonated ready to drink (rtd) packaged tea-based drinks and non-ready to drink (non-rtd) powders and liquid concentrates which dilute with water to make a product similar/identical to the ready to drink product. Includes products based on black, green, oolong, barley, rooibos, white and mate tea, as well as fruit, flower and herbal teas. Products can be cold or hot-filled and based on brewed tea or tea extract. They may contain additional flavourings, typically fruit, floral or herbal, fruit juice, sweeteners and other ingredients.

The category includes all products that have tea as their base flavour regardless of the percentage of milk or soymilk content (ie this may be more than 50%). All powders and concentrates are expressed in ready to drink (rtd) volumes.

The category also includes all products that have tea as their base flavour regardless of the percentage of juice content. Typically this is in the range of 5-30%, but premium products with higher juice content are also available in some markets such as the USA.

Includes tea and energy blends where tea is the base ingredient. Excludes tea and energy blends, where the base formulation of the product is an energy drink and tea is the flavour, products are categorized under energy drinks (see below).

Where product is made to order in chain coffee shops (such as Starbucks) from packaged ingredient, volume is recorded as packaged (eg carton, sachet, bag in box) but where product is not derived from a packaged input eg in independent restaurants and coffee shops, volume is recorded as ‘unpackaged’.

Iced/Rtd Coffee Drinks

Primarily non-carbonated packaged ready to drink (rtd) and non-ready to drink (non-rtd) coffee-based drinks (carbonated iced/rtd tea coffee is consumed traditionally in Calabria in southern Italy as a substitute for cola). May be cold- or hot-filled, based on brewed coffee or coffee extract. Products may contain additional flavouring (eg vanilla, chocolate) as well as sweeteners and other ingredients, notably milk.
**Includes** all products that have coffee as their base flavour regardless of the percentage of milk or soymilk content (ie this may be more than 50%). **All powders and concentrates are expressed in ready to drink (rtd) volumes.**

Where product is made to order in chain coffee shops such as Starbucks from packaged concentrate, volume is recorded as packaged (eg carton, sachet, bag in box), but where product is not derived from packaged concentrate eg in independent restaurants and coffee shops, volume is recorded as ‘unpackaged’.

**Excludes** coffee and energy blends, where the base formulation of the product is an energy drink and coffee is the flavour, products are categorized under energy drinks (see below).

**Includes** coffee and energy blends where coffee is the base ingredient eg Monster Hammer X-Presso (espresso energy).

**Sports Drinks**

Performance-enhancing products, described as ‘isotonic’, ‘hypertonic’ or ‘hypotonic’, meaning ‘in balance with’, ‘lighter than’ and ‘heavier than’ body fluids, respectively. Products contain key electrolytes such as calcium, potassium, magnesium, sodium, as well as glucose syrup, maltodextrin, sweeteners and acidity regulators (eg sodium citrate, calcium carbonate, calcium hydroxide). Products contain B complex group vitamins, such as:

<table>
<thead>
<tr>
<th>Vitamin</th>
<th>May also be termed:</th>
</tr>
</thead>
<tbody>
<tr>
<td>B1</td>
<td>Thiamin</td>
</tr>
<tr>
<td>B2</td>
<td>Riboflavin</td>
</tr>
<tr>
<td>B3</td>
<td>Niacin/niacinamide</td>
</tr>
<tr>
<td>B5</td>
<td>Pantothenic acid</td>
</tr>
<tr>
<td>B6</td>
<td>Pyridoxine hydrochloride</td>
</tr>
<tr>
<td>B7</td>
<td>Biotin</td>
</tr>
<tr>
<td>B12</td>
<td>Cyanocobalamin</td>
</tr>
<tr>
<td></td>
<td>Choline</td>
</tr>
</tbody>
</table>

As well as vitamin E (ie antioxidant), and vitamin C (ascorbic acid).

The category includes still or carbonated, ready to drink (rtd) products, non-ready to drink (non-rtd) powders and concentrates. It also contains fruit and non-fruit flavoured products. **All powders and concentrates are expressed in ready to drink (rtd) volumes.**

**Energy Drinks**

Energy-enhancing products, mainly carbonated and containing stimulants such as caffeine, taurine, guarana (the guarana seed has a higher caffeine content than coffee), glucuronolactone, yerba mate, along with glucose syrup (corn syrup) and maltodextrin. Typically contain B complex group vitamin combinations, such as:
As well as vitamins A and E (ie antioxidants); vitamin C (ascorbic acid); L-carnitine; exotic herbs and substances, such as gingko biloba, ginseng, milk thistle; acidity regulators. Products may also contain juice.

Includes coffee and energy blends where the base formulation of the product is an energy drink and coffee is the flavour. Includes tea and energy blends where the base formulation of the product is an energy drink and tea is the flavour.

Excludes coffee and energy blends where the coffee is the base ingredient (eg Monster Hammer X-presso), which are categorized under iced/rtd coffee drinks (see above). Excludes tea and energy blends where the tea is the base ingredient, which are categorized under iced/rtd tea drinks (see above).

The category includes still or carbonated, ready to drink (rtd) products, non-ready to drink (non-rtd) powders and concentrates. Includes energy shots, typically packed in 5-6cl format, but no larger than 8-10cl (see full definition under Market Definition). All powders and concentrates are expressed in ready to drink (rtd) volumes.

Excludes energy gels.

**Dairy Drinks**

### White Milk

*Caveat: Category volumes may include an element of double counting in countries such as India and Pakistan where hot tea is traditionally consumed with a high ratio of milk. Volumes include milk that may not be consumed as a beverage eg used in cooking or poured over cereals such as cornflakes.*

- Liquid white milk. Includes unfermented, unflavoured milk from all animals (including cows, sheep, goats and buffalo), both processed and unprocessed, packaged and bulk milk
- Includes powdered milk, except powdered infant formula and follow-on milk
- Includes reconstituted or recombined white milk, lactose-reduced white milk and organic white milk as well as fortified/enriched white milk
- Excludes ready to drink baby milk, evaporated and condensed milk, filled milk and whitener

### Cultured Dairy Drinks

- Liquid, fermented milk products characterized by their sour taste, flavoured and unflavoured, with and without sweeteners and other added ingredients. Excludes semi-liquid products, spoonable and squeezable products. Includes products such as:

| B2  | Riboflavin |
| B3  | Niacin/niacinamide |
| B5  | Pantothenic acid |
| B6  | Pyridoxine hydrochloride |
| B7  | Biotin |
| B9  | Folic acid |
| B12 | Cyanocobalamin |
|     | Inositol |
Fermented Milk

- Fermented milk, such as ayran, laban, kefir - other major types of fermented milk, characterized by differing degrees of fermentation/sourness achieved using different bacteria. In addition buttermilk - a slightly sour, whitish liquid, traditionally a by-product from the production of butter from cream, but today also produced from fermented skimmed milk.

Drinking Yogurt

- Drinking yogurt - yogurt thinned by homogenization and/or dilution; normally flavoured. May contain colouring, sweeteners, and stabilizers. Includes probiotic yogurt drinks such as Yakult and Actimel. Includes smoothies containing more than 50% dairy (smoothies containing less than 50% dairy are included in soft drinks).

Flavoured Milk

- Ready to drink and powdered white milk to which flavouring and often sweeteners, colourings and stabilizers have been added.
- Includes white milk mixed with fruit juice where milk is the majority ingredient. Excludes products where milk content is less than 50%.
- Excludes tea and coffee-based products - even where milk content is >50%. Excludes tea and coffee-based flavoured milk drinks. These are classified under iced/rtd tea drinks and iced/rtd coffee drinks.
- Includes products such as Ovaltine and Horlicks that contain significant quantities of milk; powder variants are intended to be diluted with water as the products contain sufficient milk powder.
- Excludes products such as the Nesquik and Ovaltine variants which are intended to be mixed with milk.

Soymilk

- Lactose-free, ready to drink 'milk' made by grinding soya beans and pressing out the resulting liquid. Traditional to countries such as China and Japan.
- Includes flavoured and unflavoured, sweetened and unsweetened and powdered products.
- Excludes products where soymilk content is less than 50%. This applies to beverages such as AdeZ with only 1% soy content, which are categorized as a nectar or still drink in accordance with their juice content.
- Excludes tea and coffee-based products - even where soymilk content is >50%. These are classified under iced/rtd tea drinks and iced/rtd coffee drinks.
- Soymilk has a soy protein content ≥1.8%.

Other Liquid Dairy

Includes:
Evaporated Milk

- Evaporated milk (unsweetened condensed milk) has been treated to remove some 60% of the water to reach concentration. Sterilization is required. Typically canned. May be diluted for use in beverages and cooking.

Condensed Milk

- Condensed milk (sweetened) is made in the same way as evaporated milk, but sterilization is not required due to high sugar content. Typically canned. May be diluted for use in beverages and cooking.

Hot Beverages

Coffee

Ready to drink hot coffee (all volume expressed in ready to drink/diluted litters) obtained from infusion of roasted, ground coffee beans in hot water or solution of 'instant' coffee (granules or powdered coffee extract obtained by spray- or freeze drying, instantly soluble in hot water) and hot water. Dilution ratios vary by country according to local taste. Excludes iced/rtd coffee drinks (see iced/rtd coffee drinks definition above).

Tea

Ready to drink hot tea (all volume expressed in ready-to-drink/diluted litters) made from infusion of dried tea leaves or herbal and/or fruit ingredients in hot water or from instant, freeze-dried tea in granular or powdered form. Dilution ratios vary by country. Excludes iced/rtd tea drinks (see iced/rtd tea drinks definition above).

There are three main types of tea made from the leaves of the tea bush: **green tea**, which is unfermented roasted immediately after harvesting and gives a strong, bitter and quite clear infusion; **black tea**, the most common, which is fermented and dried; and **oolong tea**, which is semi-fermented and intermediate between green and black tea. Includes flavoured teas (tea with added flavourings such as jasmine, mint, rosehip, bergamot, orange flower).

Also includes herbal/fruit 'teas' with no actual tea component eg raspberry, apple, blackcurrant, mint, camomile tea.

Other Alcoholic Drinks

Sorghum Beer

A low alcohol grain-based beer traditional to sub-Saharan African countries; home-made in rural areas. Ingredients are typically a mixture of sorghum and corn with sugar, lactic acid, yeast and molasses. Maximum Abv of 4%.

Cider

Fermented apple juice drink or pear juice drink (sometimes termed as perry), with an Abv of 0.5-10%:

- Apple cider: cider made from fermenting apples and unflavoured with any other fruit. Apple and pear blends however will be considered as apple
- Pear cider: cider made from fermenting pears and unflavoured with any other fruit. Sometimes known as perry. Excludes pear ciders that are positioned as ersatz wine (eg Babycham, Lambrini, etc)
- Flavoured cider: cider made from apples or pears but with other fruit flavours added
Wine
Defined as juice of freshly gathered grapes, vinified according to the customs and traditions of the country of origin. Wine normally contains between 8-20% alcohol, but lower alcohol content can be found in products such as wine coolers (included in Flavoured Alcoholic Beverages). Includes:

- Still light wine, without carbonation, or fortification. Can be categorized by colour (Red, White or Rose), by delimited area (eg AC, DOC, DOGC, QbA, QmP, etc) and by Country of Origin
- Wine with carbonation, either naturally occurring as a by-product of fermentation, or artificially by the injection of carbon dioxide. Includes semi-sparkling wines such as Perle, Frizzante and Cremant
- Champagne - sparkling wine produced using the 'Methode Champenoise' and produced in the Champagne AC region of France
- Made wine - low priced 'wine style drinks' made from grape concentrate and unique to the UK market

Spirits
Alcoholic liquid resulting from the distillation of such substances as fermented grape juice, grain, potatoes, fruit, sugar cane. Includes Anise Spirits, Asian Spirits, Bitters, Brandy, Fruit Brandy, Gin & Genever, Liqueurs & Specialties, Rum & Cane Spirit, Schnapps/Aquavit, Vodka, Whisky/Whiskey.

Flavoured Alcoholic Beverages (FABs)
Low-alcohol spirit mixes, often vodka or rum based, but may also be made with any spirit or neutral alcohol. Sometimes known as 'alcopops'. In the USA, these products are usually made with malt derived alcohol, known as 'malternatives' (to beer). Includes fruit based drinks, and pre-mixed versions of classic cocktails. Includes wine coolers and Japanese Chu-Hi products (based on Shochu).

Wine Coolers
Low alcohol blends of wine and fruit juice (eg Sangria - traditional to Spain). Canadean includes wine coolers within the flavoured alcoholic beverage category (FABs) and not in wine.

Fortified Wine
Wine 'fortified' by the addition of spirit which engenders a secondary fermentation. Usually around twice the strength of light wine and about half the strength of spirits. Includes Sherry, Port, Madeira, Vermouth and Apéritif Wines. Canadean considers fortified wine to be an intermediate product, neither true wines, nor spirits. They are, therefore, reported separately. Please note may include small volumes of unfortified vermouth.

Rice Wine
Asian alcoholic beverage produced from fermented rice, spring water and yeast.

Sake
Japanese alcoholic beverage brewed from fermented rice. Typically has an Abv of 14-16%.
Packaging Definitions

'Packaging' is defined as all products made of any materials of any nature to be used for:

- containment
- protection
- handling
- delivery
- presentation of goods

There are three categories of packaging:

- primary (sales) packaging, around the goods at the point of purchase by the user or consumer
- secondary (collation) packaging, which groups a number of items together until the point of sale (eg multi-packaging)
- tertiary (transit) packaging, which allows handling and transport of a number of grouped items as a unit

Canadean collects information on Primary Packaging - that is the container around the goods at the point of purchase. This includes both consumer and food service packaging. Bulk dispensed beverages are packaged in a bulk container (such as bag in box concentrate or barrel or bubble top), even if the beverage is dispensed into a drinking vessel for consumption.

Some packaging is also intended to facilitate consumption of the beverage. This could be a can with a ring-pull opening, a carton with a straw or a cup with a removable lid, for example.

Containers intended only to facilitate consumption of the beverage are not packaging. Glasses, mugs etc are not packaging. A cup is only packaging if the cup has an integral lid to facilitate transportation. Beverages that are dispensed into lidded paper cups with drinking straws at the point of sale to facilitate consumption are not packaged in cups because the cups facilitate consumption and not handling and delivery.

Canadean collects information about packaging by listing a series of attributes which together describe the package.

The attributes are:

- pack type
- pack material
- pack size
- refillable
- carbonation
- physical state
- stability (JNSD only)

These attributes will each be described in turn:

Package Type Definitions

Bag in Box (bib)
A cardboard box with a foil or plastic liner usually used to contain a large quantity of beverage.
For vending machines where syrup from a bag in box is mixed with mains water and the beverage dispensed into a pouch immediately before consumption, pouch is recorded as the packaging as this is the last packaging utilized prior to consumption.

Environmentally friendly ‘bag in boxes’ whereby large pouches of beverage are purchased (usually for commercial use) and designed to fit into a reusable plastic box are recorded as pouch as the beverage is purchased by the pouch.

**Bottle**
A container for liquids, usually made of glass or plastic, with a narrow neck. A bottle is usually made of one piece of material, but can be 2 pieces seamed together.

**Board Can**
A container made of board with a metal top and bottom, made in three parts. Available in North America, typically for frozen concentrated juice.

**Box**
A square or rectangular container with stiff sides and sometimes a lid. A box is not usually made of laminated material so would not usually be suitable for a liquid beverage.

**Bubble Top**
A large container usually used to supply water in large quantities, often used in a cool water dispenser, mainly used in offices. In China bubble top containers are referred to as ‘carboys’.

**Can**
A two or three part container, which may be cylindrical, rectangular or custom-shaped. Cans are usually made of aluminium or tinplate, although cans with the main part of the body comprising board or PET are also available in some markets.

**Carton**
A box made from laminated layers of board with or without aluminium foil lining. A laminated beverage container made principally of board is a carton according to Canadean definitions, regardless of shape or the name given by the manufacturer.

Pouch shaped cartons and pillow shaped cartons are recorded as cartons.

**Cup**
A container with a removable lid, often made of thin plastic, where the lid can be removed or pierced after transportation to enable the container to then be used for consumption.

**Demijohn**
A large glass container, usually with handles to facilitate carrying, sometimes referred to as a bell jar.

**Drum**
A very large cylindrical container, usually made of three parts.

**Jar**
A container with a wide mouth, usually used to store powders or thick liquids such as foods. The neck should be so short that the lid almost touches the body of the container. The neck should be almost as wide as the base of the container. Jars usually have a screw top.

Containers for juice that have a neck that is almost as wide as the body of the container but have a neck that is long enough to prevent the lid from touching the body of the container are classified as a bottle.

**Keg**
A cylindrical container usually made of metal and used for storing beer or other alcoholic drinks. A CO2 line is often attached to a keg to dispense beer through a font.
Metal Bottle (Bottle Can)
A container made of metal, usually one piece excluding the closure, shaped like a bottle. Within the data set this pack type is recorded as bottle and the material as metal.

Pouch
A package made of flexible material that can stand unsupported, usually made of two pieces of plastic or foil seamed together to form a package with a definite base to stand on.

For vending machines where syrup from a bag in box is mixed with mains water and the beverage dispensed into a pouch immediately before consumption, pouch is recorded as the packaging as this is the last packaging utilized prior to consumption.

Environmentally friendly ‘bag in boxes’ whereby large pouches of beverage are purchased (usually for commercial use) and designed to fit into a reusable plastic box are recorded as pouch as the beverage is purchased by the pouch.

Sachet
A container usually made of only one piece of paper or plastic that is not designed to stand unsupported. Sachets can be used for liquid beverages and powders. Includes pillow pouch unless made of laminated board, in which case, the package is a carton.

Tank
A large closed container for liquid where the beverage is dispensed via a valve.

Tub
A small container with a removable lid, usually as wide as the base, often used to store powdered beverages. The lid of a tub is usually removed by lifting, not by unscrewing.

Tube
A long thin container made of soft metal or plastic, which is closed at one end and has a small hole at the other, usually with a cover, and which is used for storing thick liquids.

Unpackaged
Products that have never been packaged eg products which are sold by the cup on the street. Where a commercial container is used to dispense beverages by the cup, the commercial container should be recorded by pack material, pack type and size eg metal barrel 4,000cl. However, beverages that are never packaged prior to consumption, such as a juice squeezed from fruit on demand, should be recorded as unpackaged.

Water from in-store water filtration machines where the water is piped directly from the mains and filtered by the machine ie the machine is not refilled with bag in boxes and the customer usually brings their own refillable container may be recorded as unpackaged.
Packaging Material
Packaging materials are the materials used in the manufacture of packaging and includes raw materials and processed materials prior to their conversion into packaging.

Few packages are made solely of one material. The information that Canadean collects refers to the principal material used to construct the pack.

Most containers are coated in the inside to protect the beverage and coated on the outside for cosmetic or printing purposes. Many containers are made of several layers of packaging material. The focus is on the main material.

Options are:

Board
Containers made of cardboard ie several layers of fibrous wood pulp, often known as paperboard. Containers are commonly coated in polyethylene and lined with foil, but are recorded as board if board is the main material of the package.

Cornstarch
Biodegradable containers made of polylactic acid (usually derived from corn starch, occasionally derived from sugar cane), sometimes abbreviated to PLA. Like PET, PLA is clear, tough and can be clear or collared. Bottles are blown into a mould, resulting in a dot on the base of the bottle. Blown bottles are stronger than heat seamed bottles. PLA bottles are one of a number of materials with a number 7 in the triangle symbol. Cornstarch bottles are usually very clearly labelled in order to position their biodegradable properties. PLA can easily be identified as its heat resistant properties are inferior to most plastics. 100% cornstarch bottle will melt if filled with liquid at 50˚C (very hot tap water). For this reason, most containers are a mixture of PLA and other ingredients. Containers made of a PLA mix cannot usually hold liquid above 80˚C (hot coffee). To be recorded as cornstarch, the container should contain at least 50% PLA.

Foil
A very thin sheet of metal, especially used to wrap food in to keep it fresh. Foil is used to keep the beverage fresh and is a component of many pack types. A container is only recorded as foil if foil is the dominant material in the package. For example, many cartons have a foil liner, but a carton cannot be made of foil.

Glass
An inorganic substance fused at high temperature and cooled quickly so that it solidifies into a vitreous and non-crystalline state so that, although the molecular structure is similar to that of a liquid, the mass is rigid.

In a packaging context glass containers are continuously moulded in a furnace at high temperature (over 1300 °C) into narrow neck bottles or wide-mouth jars using a mixture of chemicals derived from sand, limestone, soda and metal silicates. Amber (brown), green, blue and opal (clear) colour variants can be produced by varying the specific chemical mix. Glass containers generally offer the advantages of relatively high transparency, rigidity, temperature stability and resistance to thermal shock, but the disadvantages of higher weight and fragility compared with alternative packaging media.

HDPE
Containers made of High Density Polyethylene. HDPE containers are produced in two parts and joined with a heat seam. The weakness of the seam makes these bottles unsuitable for carbonated drinks. Unpigmented bottles are translucent, have good barrier properties and stiffness and are well suited to packaging products with a short shelf-life, such as milk. Pigmented HDPE bottles have better stress crack resistance than unpigmented HDPE bottles. HDPE bottle are normally opaque (unpigmented) or white. HDPE bottles can be identified by the number 2 in the triangle symbol.

LDPE
Containers made of Low Density Polyethylene. LDPE containers are very soft and flexible and are used predominately in film applications due to its toughness, flexibility and relative transparency, making it popular for use in applications where heat sealing is necessary. LDPE is also used to manufacture some flexible lids and, very rarely, bottles. LDPE bottle can be identified by the number 4 in the triangle symbol.
Metal
Packaging made from a common metal element such as aluminium, tinplate, steel or a mixture of metals. (There is no requirement to state which metal or combination of metals the container is made from). Containers may be coated or covered in a label.

Paper
A thin flat material which is made from crushed wood or cloth. Paper would usually only be used to make sachets. Cartons are made of board and paper cups are a vessel to facilitate consumption and not a pack type.

PEN
Containers made of Polyethylene Naphthalate. These shiny, translucent blown bottles have excellent oxygen barrier properties. Similar in appearance to PC and also marked with the 7 symbol, PEN bottles are refillable (20 times) and are fully recyclable at the end of their life.

PET
Containers made of Polyethylene Terephthalate, sometimes abbreviated to PET or PETE. PET is clear, tough and has good gas and moisture barrier properties. Bottles are blown into a mould, resulting in a dot on the base of the bottle. Blown bottles are stronger than heat seamed bottles. PET bottles can be identified by a number 1 in the triangle symbol or, when burned, by the smell of wax and dripping like a candle without smoke.

Polycarbonate
Containers made of Polycarbonate (PC). Polycarbonate has good chemical resistance and is strong. PC is normally used for thick, heavy containers such as bubble tops. Polycarbonate is one of many materials marked with the number 7 in the triangle symbol and can be identified by the yellowish sooty smoke and sweetish smell when burnt.

Polypropylene
Containers made of Polypropylene (PP). Polypropylene has good chemical resistance, is strong, and has a high melting point making it good for hot-fill liquids. Polypropylene is found in flexible and rigid packaging. Polypropylene can be identified by the number 5 in the triangle symbol or, when burnt, by the smell of burnt oil and dripping without smoke.

Polystyrene
Containers made of Polystyrene (PS). A rigid opaque packaging, that is often brittle and glossy. Very thin, lightweight containers are often made of polystyrene. Unpigmented bottles are translucent and are well suited to packaging products with a short shelf-life such as dairy products. Bottles are injected into a mould, resulting in a dot on the base of the bottle. Polystyrene bottles can be identified by the number 6 in the triangle symbol and a greenish bubble effect when burnt.

PVC
Containers made of Polyvinyl Chloride. In addition to its stable physical properties, PVC has good chemical resistance. The diverse slate of vinyl products can be broadly divided into rigid and flexible materials. PVC bottles are made in two parts and joined with a heat seam, making this bottle unsuitable for carbonated drinks. Upon close inspection, transparent PVC bottles can be seen to be slightly opaque. PVC bottles can be identified by the number 3 in the triangle symbol, or by the black smoke and acrid smell given when burned.

Refillable
A container designed to be refilled; taken back to point of purchase (not necessarily the same one) by the consumer in order to be refilled with the same, or similar, liquid product. This usually involves a monetary deposit, refundable on return of bottle. The bottle may be refilled on site, or directed to local filler. This is not to be confused with ‘recyclable’ bottles, which may be termed ‘returnable’ for the purpose of recycling.

Barrels, kegs and tanks are considered to be refillable.
Non-Refillable
Bottle designed for single usage only. It can be returned to point of purchase, or taken to a recycling facility, but is not refilled.

Carbonation
Indicates the level of carbonation of the product contained within the package.
Options are:
- Low
- Regular
- No Carbonation

Physical State
This describes the physical state of the product within the package.
Options are:
- Powder
- Concentrate
- Ready to Drink (rtd)

Stability
Defines the technical shelf stability. Options are:
- Short-life - products which need to be chilled in order to remain shelf stable (typically have a shelf-life of 7 days)
- Long-life - products which do not need to be chilled to remain shelf stable

Note: Frozen is classed as long-life.
**Glossary**

**Packaging**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-serve</td>
<td>Pack size &lt;60cl</td>
</tr>
<tr>
<td>Multi-serve</td>
<td>Pack size between 61cl and 1,000cl. This category also includes bulk packaging, but excludes Bulk/HOD water volume</td>
</tr>
<tr>
<td>Rb/ref</td>
<td>Refillable bottle (glass)</td>
</tr>
<tr>
<td>nr/nrb/non-ref</td>
<td>Non-refillable bottle (glass)</td>
</tr>
<tr>
<td>PET</td>
<td>Polyethylene terephthalate</td>
</tr>
<tr>
<td>aPET</td>
<td>Aseptic polyethylene terephthalate</td>
</tr>
<tr>
<td>refPET</td>
<td>Refillable polyethylene terephthalate</td>
</tr>
<tr>
<td>nrPET</td>
<td>Non-refillable polyethylene terephthalate</td>
</tr>
<tr>
<td>PVC</td>
<td>Polyvinyl chloride</td>
</tr>
<tr>
<td>HDPE</td>
<td>High density polyethylene</td>
</tr>
<tr>
<td>LDPE</td>
<td>Low density polyethylene</td>
</tr>
<tr>
<td>PC</td>
<td>Polycarbonate</td>
</tr>
<tr>
<td>PEN</td>
<td>Polyethylene Naphthalate</td>
</tr>
<tr>
<td>PS</td>
<td>Polystyrene</td>
</tr>
<tr>
<td>BinB</td>
<td>Bag in box - includes pre-mix/post-mix (fountain)</td>
</tr>
</tbody>
</table>

**Distribution:**

**Off-premise**

Volume sold for 'subsequent consumption' away from the place of purchase, comprising:

**Modern Retail:**
- **Large Modern**: Supermarkets, hypermarkets, department stores (Karstadt): modern facilities, typically with electronic tills, barcode scanning and multiple checkout
- **Convenience**: Stores such as 7-11, petrol/gas station outlets - typically small food stores with long opening hours, often selling ready meals and fast food
- **Discount**: Hard discounter stores, such as Lidl and Aldi, where focus is on low pricing.

**Traditional Retail**: Traditional food stores: 'mom & pop' style, CTNs, delis, pharmacies/drugstores. Street stalls and kiosks (not for immediate consumption).

**Specialist Beverage Retailer**: Off-licenses, liquor stores, specialist drinks shops.

**Home Delivery**: On-line/telephone/mail order, deliveries to home address.

**On-premise**

Volume sold for 'immediate consumption' at the place of purchase, comprising:

**Vending**: Automatic merchandising machines selling (usually) branded beverages.

**QSR**: Quick Service restaurants and fast food restaurants. Payment is made prior to consumption. Typically informal surroundings with seating and minimal or usually no table service. Either an independent self-service or fast food outlet, or part of a chain eg motorway services or fast food chain eg McDonalds. Includes snack bars, sandwich shops, cafes and self-service cafes/restaurants in retail outlets.

**EDA Places (Eating, Drinking & Accommodation) / Horeca:**
- **Eating**: establishments where beverage consumption is generally an accompaniment to a meal and full waiting service is provided. Payment is made after consumption
- **Drinking**: establishments primarily engaged in the sale of drinks for consumption on premise. Including bars, clubs, pubs, nightclubs, private/member social clubs
- **Accommodation**: establishments where the primary function is to provide accommodation facilities. Including hotels, motels, hostels, camp sites, caravan sites, holiday parks, B&Bs, guest houses, pensions, chalets. Includes meetings, conferences and conventions held in hotels/motels

**Institutions**: Such as workplaces, hospitals, medical centres, nursing homes, schools, universities, prisons, military.
Other On-premise: Such as street stalls and kiosks (including mobile equipment), travel and transport (on board domestic rail, air, sea, coach/bus), leisure (including cinemas, theatres, gyms/health clubs, stadiums, museums/galleries etc) and special/one-off events.

Other commonly used abbreviations

- A&P: Advertising and promotion
- Abv: Alcohol by volume
- BOGOF: Buy one get one free
- CAGR: Compound annual growth rate
- CEFTA: Central European Free Trade Agreement
- CPI: Consumer Price Index
- CTNs: Confectioners, tobacconists, newsagents
- CSD: Carbonates
- E/e: Estimate
- EDLP: Everyday low price
- ESL: Extended shelf life
- EU: European Union
- (Year)F: Forecast
- (Year)P: Provisional
- FABs: Flavoured alcoholic beverages
- Fmcg/FMCG: Fast-moving consumer goods
- GDP: Gross domestic product
- GST: Goods and services tax
- HL/hl: Hectolitres (100 litres)
- HOD: Home & office delivery
- Horeca: Hotels, restaurants and cafes
- JNSD: Juice, nectars, still drinks
- LPA: Litres of pure alcohol
- na: Not available/Not applicable
- NFC: Not from concentrate
- Non-rtd: Not ready to drink
- Per cap: Per capita
- PL: Private Label (distributors' own label; DOBs; retailers' own label)
- PPP: Purchasing power parity
- Rtd: Ready to drink
- SKU: Stock keeping units
- VAT: Value added tax