

**Food For Thought (FFT)
Strategic Information Services**

The Soft Drinks & Juices Market in Germany

2009 Edition

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FOREWORD

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OVERALL DEFINITIONS

- General:** Market data refer to all products sold for final human consumption in retail, foodservice and artisanal markets (own-produced for own sale, e.g. independent bakers), thus excluding industrial and intermediate consumption, and auto-consumption.
- Product:** All product markets are carefully defined so as to be comparable across all countries. Special cases in a few country and product markets are specified.
- Prices:** Retail prices (including VAT, excise and other indirect taxes) and foodservice buy-in prices are applied throughout.

METHODOLOGY

All countries are surveyed in the field regularly, during which extensive company and other interviews are carried out. FFT also systematically gathers all publicly available data (from trade associations, government institutions and publications, the press and other media). The definition above (final human consumption) ensures that there is no double-counting among product markets. In turn, this enables comparisons across all country/product markets on a per capita or unit value or real growth basis, and allows all data to be summed by product, by country, or by category, allowing extensive cross-checking for verisimilitude. Foodservice Markets: The total (retail + foodservice) human consumption market is established first. An estimate of the food-service market share, derived from multiple sources and industry interviews, is then applied to this total. Owing to the extremely fragmented nature of the foodservice market, specific foodservice surveys are not considered feasible or reliable.

FULL COVERAGE

There are NO gaps. Volume, Value and Company Market Share data are provided for ALL country and product markets. FFT provides its own carefully assessed estimates in the absence of any available data source.

DATA COLLECTION PRINCIPLES

- 1 End-Use Definition:** Final Human Consumption (see above). This ensures NO double-counting and that any and all data can be added up.
- 2 Wide Coverage:** All demand & supply - including retail, foodservice and direct supply - provides a fixed frame into which all elements must fit in a logical manner.
- 3 The 100% Rule:** Company market shares must add up to no more than 100%, and wide coverage means that all significant supplier market shares must be fitted in, squeezing many company claims!
- 4 Cross-checking:** To ensure verisimilitude, extensive country comparisons are made of per capita consumption and expenditure, real growth rates, etc., and against 10-year historical trends. Data "outliers" are singled out, and if necessary re-checked in the field.
- 5 Critical Review:** All publicly available data - the trade press, associations, government surveys, etc., are exhaustively collected & collated, and many amended or rejected, applying the above principles.
- 6 Original Sourcing:** Extensive field surveys, company interviews and store checks are carried out every year, and all data is "fitted" to a realistic overall picture of total supply and demand.
- 7 Software:** Complex, internally-developed computer programs provide a unique dynamic interlocking data grid.
- 8 Russian Doll:** Internal consistency and coherence is provided by data adjusting automatically to data changes elsewhere.
- 9 Client Feedback:** Continual improvements are incorporated in each annual edition at clients' suggestions and remarks, thus fine-tuning the database to market realities.
- 10 Strategic View:** Strategic View: Presentation techniques favoring a global vision of food & drink markets are systematically applied.

THE SOFT DRINKS & JUICES MARKET IN GERMANY

TABLE OF CONTENTS

Summary Market Tables	7
2003 Total Expenditure	7
Germany and 1-Country Total	7
2008 Total Expenditure	8
Germany and 1-Country Total	8
2008 Retail Expenditure	9
Germany and 1-Country Total	9
2008 Foodservice Expenditure	10
Germany and 1-Country Total	10
2003-2008 Value Growth Rates	11
Germany and 1-Country Total	11
2003-2008 Per Capita Growth Rates	12
Germany and 1-Country Total	12
2008 Retail Market Share	13
Germany and 1-Country Total	13
2008 Foodservice Market Share	14
Germany and 1-Country Total	14
2008 Total Retail Market Share	15
Germany and 1-Country Total	15
2008 Total Foodservice Market Share	16
Germany and 1-Country Total	16
Demand and Supply by Product	17
17. All Soft Drinks & Juices Market Profile	19
Periscope for All Soft Drinks & Juices in Germany	19
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, All Soft Drinks & Juices, Germany	20
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2008-2013	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, All Soft Drinks & Juices, Germany	20
Retail, Foodservice and Total Demand, 2003, 2007 and 2008	
Total demand 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market consumption, 2008	
Total Market Value, All Soft Drinks & Juices, Germany	20
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2003, 2007 and 2008	
Total demand real 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market expenditure, 2008	
Company Market Shares, All Soft Drinks & Juices, Germany	21
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, All Soft Drinks & Juices, Germany	21

Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009	21
17.1 Mineral Water Market Profile	23
Periscope for Mineral Water in Germany	23
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Mineral Water, Germany	24
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2008-2013	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Mineral Water, Germany	24
Retail, Foodservice and Total Demand, 2003, 2007 and 2008	
Total demand 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market consumption, 2008	
Total Market Value, Mineral Water, Germany	24
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2003, 2007 and 2008	
Total demand real 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market expenditure, 2008	
Company Market Shares, Mineral Water, Germany	25
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Mineral Water, Germany	25
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009	
Major Brands, Mineral Water, Germany	26
Major Brands Listing by Company and Subsidiary, 2009	
17.2 Soft Drinks Market Profile	27
Periscope for Soft Drinks in Germany	27
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Soft Drinks, Germany	28
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2008-2013	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Soft Drinks, Germany	28
Retail, Foodservice and Total Demand, 2003, 2007 and 2008	
Total demand 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market consumption, 2008	
Total Market Value, Soft Drinks, Germany	28
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2003, 2007 and 2008	
Total demand real 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market expenditure, 2008	
Company Market Shares, Soft Drinks, Germany	29
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Soft Drinks, Germany	29
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009	
Major Brands, Soft Drinks, Germany	30

Major Brands Listing by Company and Subsidiary, 2009	30
17.3 Fruit Juices and Drinks Market Profile	31
Periscope for Fruit Juices and Drinks in Germany	31
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Fruit Juices and Drinks, Germany	32
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2008-2013	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Fruit Juices and Drinks, Germany	32
Retail, Foodservice and Total Demand, 2003, 2007 and 2008	
Total demand 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market consumption, 2008	
Total Market Value, Fruit Juices and Drinks, Germany	32
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2003, 2007 and 2008	
Total demand real 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market expenditure, 2008	
Company Market Shares, Fruit Juices and Drinks, Germany	33
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Fruit Juices and Drinks, Germany	33
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009	
17.31 Fruit Juices Market Profile	35
Periscope for Fruit Juices in Germany	35
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Fruit Juices, Germany	36
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2008-2013	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Fruit Juices, Germany	36
Retail, Foodservice and Total Demand, 2003, 2007 and 2008	
Total demand 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market consumption, 2008	
Total Market Value, Fruit Juices, Germany	36
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2003, 2007 and 2008	
Total demand real 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market expenditure, 2008	
Company Market Shares, Fruit Juices, Germany	37
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Fruit Juices, Germany	37
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009	
Major Brands, Fruit Juices, Germany	38
Major Brands Listing by Company and Subsidiary, 2009	
17.32 Fruit Drinks Market Profile	39

Periscope for Fruit Drinks in Germany	39
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Fruit Drinks, Germany	40
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2008-2013	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Fruit Drinks, Germany	40
Retail, Foodservice and Total Demand, 2003, 2007 and 2008	
Total demand 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market consumption, 2008	
Total Market Value, Fruit Drinks, Germany	40
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2003, 2007 and 2008	
Total demand real 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market expenditure, 2008	
Company Market Shares, Fruit Drinks, Germany	41
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Fruit Drinks, Germany	41
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009	
Major Brands, Fruit Drinks, Germany	42
Major Brands Listing by Company and Subsidiary, 2009	
17.4 Squashes and Concentrates Market Profile	43
Periscope for Squashes and Concentrates in Germany	43
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Squashes and Concentrates, Germany	44
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2008-2013	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Squashes and Concentrates, Germany	44
Retail, Foodservice and Total Demand, 2003, 2007 and 2008	
Total demand 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market consumption, 2008	
Total Market Value, Squashes and Concentrates, Germany	44
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2003, 2007 and 2008	
Total demand real 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market expenditure, 2008	
Company Market Shares, Squashes and Concentrates, Germany	45
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Squashes and Concentrates, Germany	45
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009	
Major Brands, Squashes and Concentrates, Germany	46
Major Brands Listing by Company and Subsidiary, 2009	
17.5 Health & Sports Drinks Market Profile	47

Periscope for Health & Sports Drinks in Germany	47
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Health & Sports Drinks, Germany	48
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2008-2013	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Health & Sports Drinks, Germany	48
Retail, Foodservice and Total Demand, 2003, 2007 and 2008	
Total demand 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market consumption, 2008	
Total Market Value, Health & Sports Drinks, Germany	48
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2003, 2007 and 2008	
Total demand real 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market expenditure, 2008	
Company Market Shares, Health & Sports Drinks, Germany	49
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Health & Sports Drinks, Germany	49
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009	
Major Brands, Health & Sports Drinks, Germany	50
Major Brands Listing by Company and Subsidiary, 2009	
17.6 Iced Tea Market Profile	51
Periscope for Iced Tea in Germany	51
Summary Flowchart of Major Suppliers, Demand and Distribution Channels	
Introduction, Iced Tea, Germany	52
Detailed product definition, including local market particularities	
5-year regional and 25-country real annual % value total forecasts, 2008-2013	
Strategic Assessment: Comparative 25-country total data (N.America, W.+E. Europe) for all market data below provided	
Total Market Volume, Iced Tea, Germany	52
Retail, Foodservice and Total Demand, 2003, 2007 and 2008	
Total demand 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market consumption, 2008	
Total Market Value, Iced Tea, Germany	52
Retail, Foodservice and Total Demand, in US Dollars and Euros, 2003, 2007 and 2008	
Total demand real 5-year growth rates, 2003-2008	
Per capita retail, foodservice and total market expenditure, 2008	
Company Market Shares, Iced Tea, Germany	53
Up to Top-10 Ultimate Holding Company Market Shares (updated monthly)	
Who owns Whom: Key Local Subsidiary given for each Holding Company	
Distribution Channels, Iced Tea, Germany	53
Distribution Channel % Shares: Branded, Unbranded, Own Label and Artisanal, 2009	
Major Brands, Iced Tea, Germany	54
Major Brands Listing by Company and Subsidiary, 2009	

Company Profiles in Germany 55

ALL companies and subsidiaries identified in the markets covered listed

Holding Company Country and Product Market Shares & Rankings (updated monthly)

Note: Applying 2009 Company Market Shares to 2008 Market Value data

3i Group to Ameckes	56
Artal to Berentzen	57
Bitburger Brauerei to Campina	58
Carlsberg to Cott	59
Cristopherus to Eckes	60
Eckes to Granus Quelle	61
Gyldenmost to Hero	62
Hero to JW Childs	63
JW Childs to Kumpf	64
Lange Stiftung to Natursaft Sachsen	65
Nestlé to PepsiCo	66
PepsiCo to Rauch	67
Rhino's Energy to Schwarz	68
Schwarzwald Sprudel to Teutoberg. Brunnen	69
Teutoberg. Brunnen to Vilsa	70
Vilsa to Über-kinger	71
Über-kinger	72

Major Brands And 'Who Owns Whom' in Germany 73

Holding Companies, Key Local Subsidiaries and Major Brands systematically identified
by product and country

Major Brands by Product Market	75
17.1 Mineral Water	75
17.2 Soft Drinks	76
17.31 Fruit Juices	76
17.32 Fruit Drinks	77
17.4 Squashes and Concentrates	78
17.5 Health & Sports Drinks	78
17.6 Iced Tea	78
Major Brands by Holding Company	81
3i Group to Cott	81
Custodia Holding to JW Childs	82
JW Childs to Rhein Main Neckar Brauerei	83
Rhino's Energy to Überkinger	84
Überkinger to Überkinger	85