

INDIA
BOTTLED WATER INDUSTRY
MARKET PROFILE



BOTTLED WATER

*The Liquid of Life, the most basic of drinks,
appeals to an increasing number of health-conscious consumers*




and is the fastest growing among all beverage categories

Bottled water

***has become the "in" drink
across the country.***

***It has been proven and regulated by
Bureau of Indian Standards as a food
product and meets all food packaging
regulations.***

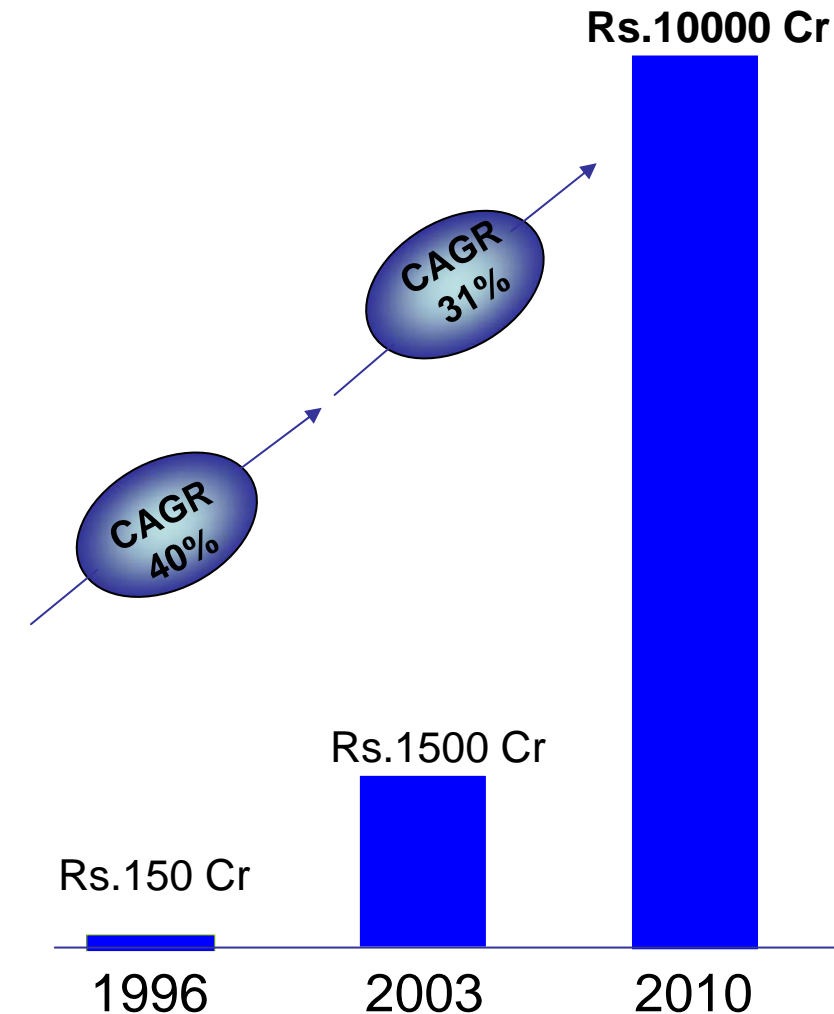
Indian Scenario

- Over 500 brands prevalent in the bottled water segment.
- The outbreak of water-borne diseases, erratic municipal supplies and health consciousness have all contributed to the growth of the industry.
- Total market size of the bottled water is Rs. 2000 crore, of this around Rs 1700 crore is in the hands of organized sector and the rest is with unorganized sector.
- According to ORG data  **Kinley** market-share is **29.8** per cent, followed by PepsiCo's  with **11.5** per cent share. While  share has slipped, it remains the market leader with a **37.6** per cent share.

Indian Scenario cont'd

- The over all market for the past three years has been growing at an astounding rate of more than 40-50%.
- This strong double digit growth rate of the industry has attracted a number of global players in the market.
- In the recent past some the major players like Coke, PepsiCo, Nestle have launched their products in the market.
- Many more like Britannia, HLL have evinced interest in the market.

PACKAGED DRINKING WATER SET TO SHOW STUNNING GROWTH



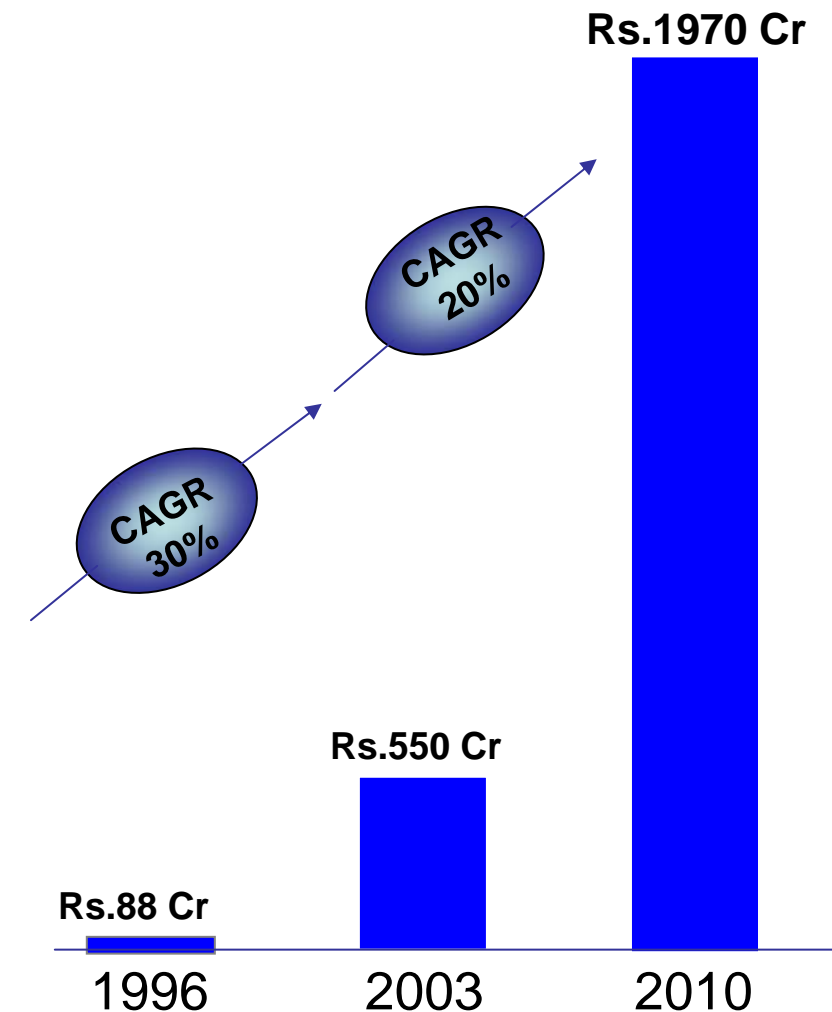
India Desk

- With the average growth rate of 31% per annum the packaged drinking water market is expected to touch a turnover of Rs.10,000 Crore by the year 2010.
- This growth rate will definitely happen as countries like Indonesia, Malaysia and Singapore having a much smaller population but in similar climatic conditions like India are already doing water sales turnover beyond Rs.15,000 to 20,000 Crore at present.

Alcohol and Beverage Desk - Dr. Mohan Krishna

CARBONATED WATER (SODA)

BUBBLING WITH FIZZ



India Desk


- With the average growth rate of 20% per annum the Carbonated Water (Soda) market is expected to touch a turnover of close to Rs.2,000 Crore by the year 2010.
- This growth rate will definitely happen as countries like Indonesia, Malaysia and Singapore having a much smaller population but in similar climatic conditions like India are already doing soda sales turnover beyond Rs.3,000 to 5,000 Crore at present.

Alcohol and Beverage Desk - Dr. Mohan Krishna

INDIAN BEVERAGE MARKET

PER CAPITA CONSUMPTION BY CATEGORY

1998-2003

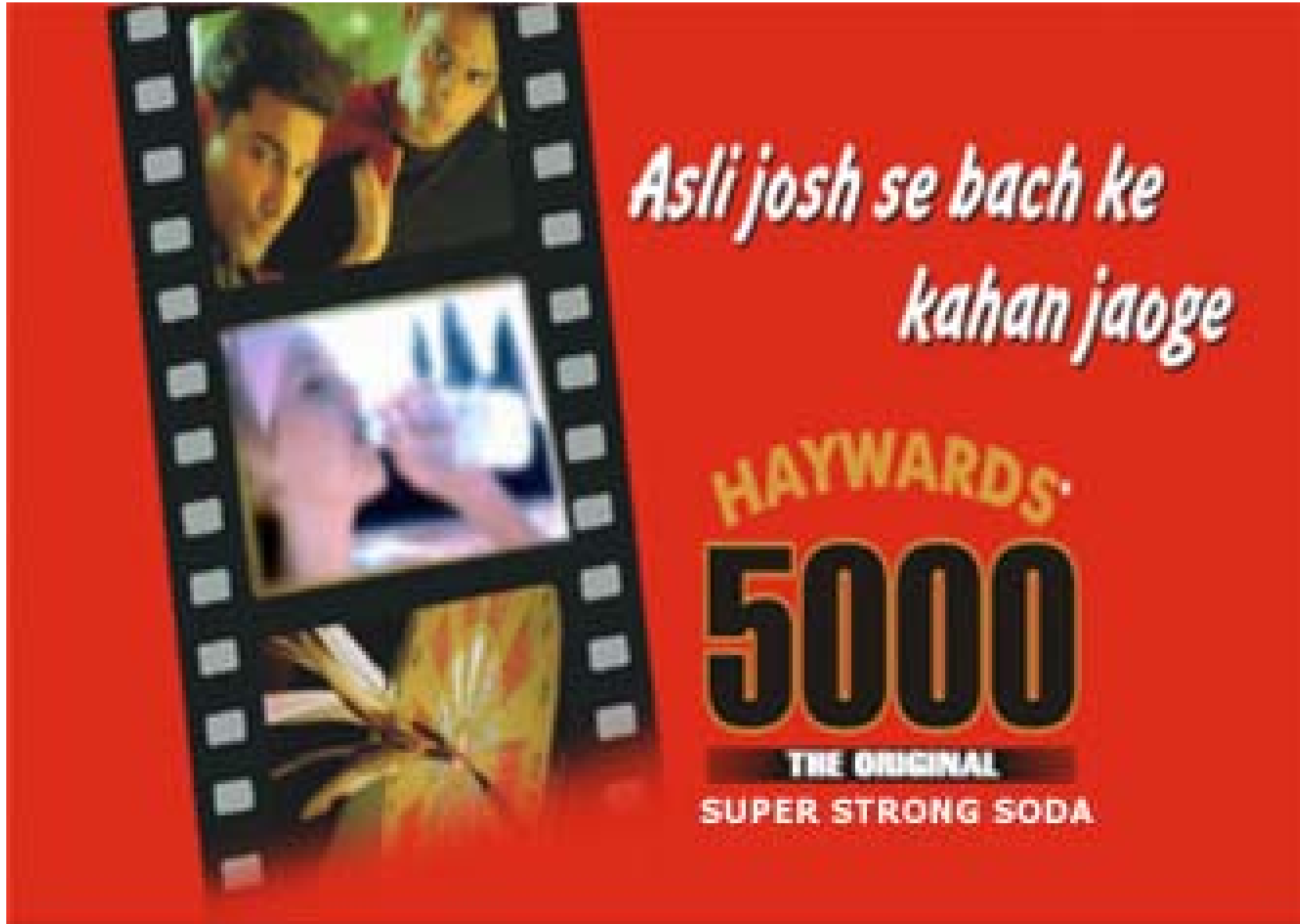
Categories	1998	1999	2000	2001	2002	2003
Beer	0.4	0.4	0.5	0.5	0.6	0.6
 Bottled Water	0.1	0.1	0.2	0.3	0.4	0.5
CSDs	1.0	1.2	1.2	1.5	1.6	1.8
Coffee	2.0	1.2	1.3	1.3	1.3	1.2
Distilled Spirits	0.4	0.4	0.5	0.6	0.7	0.8
Fruit Beverages	0.1	0.1	0.1	0.2	0.2	0.2
Milk	41.2	41.7	40.2	40.7	40.1	40.5
Tea	49.7	50.9	49.2	52.5	48.2	44.2

Bottled Water is the fastest growing among all beverage categories

SOURCE: CANADEAN

REASONS FOR AN ALCOHOLIC BEVERAGE COMPANY TO TAP THIS GROWING BUSINESS...

- The direct advertising of alcoholic beverages is banned on TV channels and on other media, hence there is an importance to have a co-related Brand Extensions like Packaged drinking water and Carbonated soda to continue brand building and as well create a long-term strategy for profit earnings from this fastest growing industry.
- Widespread use of Packaged drinking water brand across the country can ensure greater reach and create high brand recall for the alcoholic beverage product as well.



*Asli josh se bach ke
kahan jaoge*

HAYWARDS
5000
THE ORIGINAL
SUPER STRONG SODA



Shaw Wallace

*Rich Taste
by Royal Challenge*

ROYAL
CHALLENGE
Just Chill

ROYAL
CHALLENGE
PREMIUM SPARKLING WATER

Royal Challenge. Extra-ordinary Sparkling Water.

Just Chill

For additional informations, please contact:

Tel + 39 02 5843 0900

Ing. Carlo Paris

Carlo.paris@parisandpartners.it

Ashish Agarwal

Ashish.agarwal@parisandpartners.it