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Consumer | Beverages Methodology Guide

IARD Version

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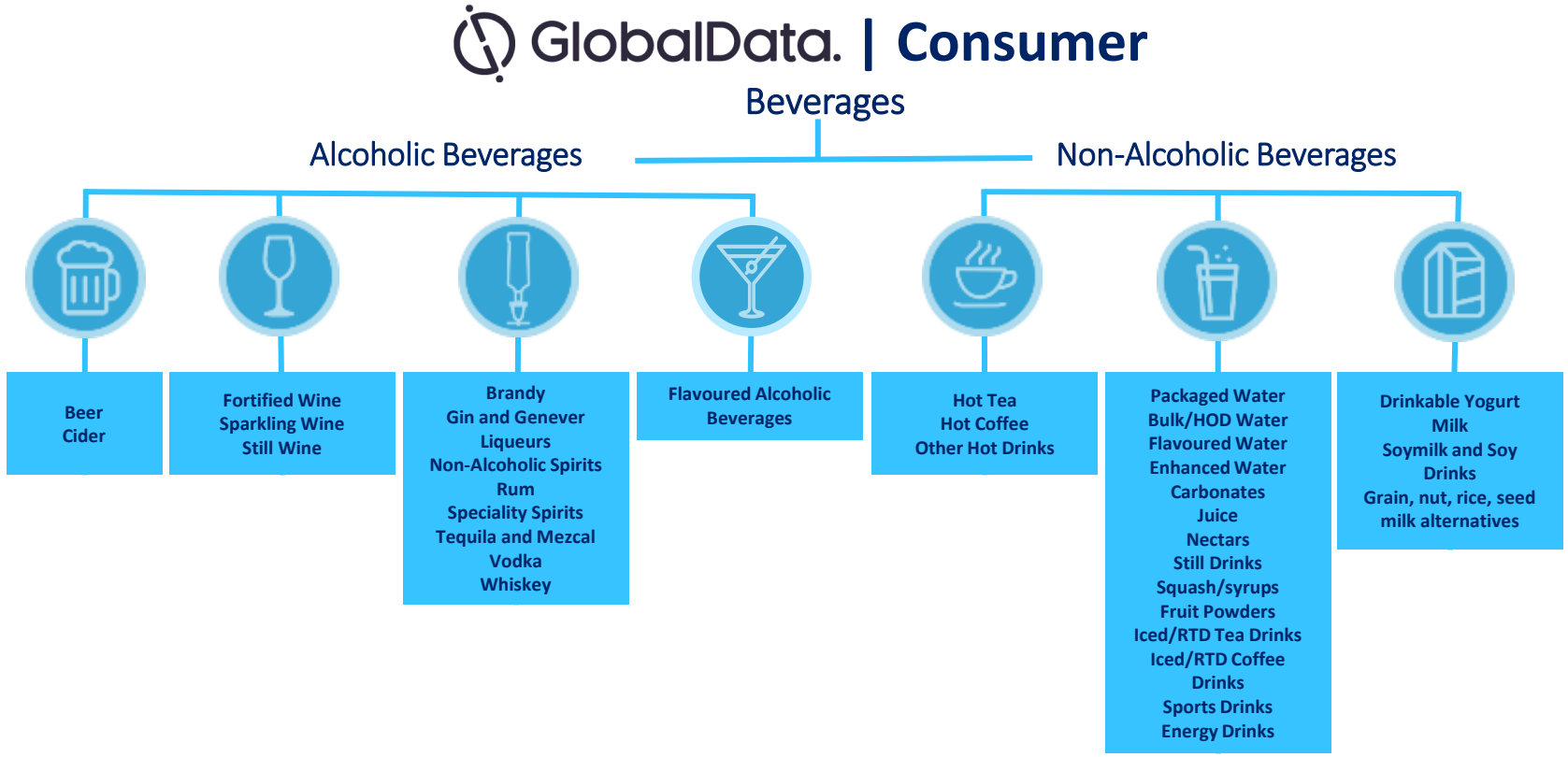
Overview

GlobalData's comprehensive beverages research provides unique industry insights

GlobalData researches 36 product categories from a value and volume perspective, which enables clients to gain unique industry insights to help it capitalise on growth opportunities.



Category Segments	100
Unique Trademark Owners	9000+
Unique Trademark Brands	26,000+
Retail and Foodservice Channels	13
Unique Pack Type/Material/Size combinations	3500+

GlobalData’s Geographical Coverage

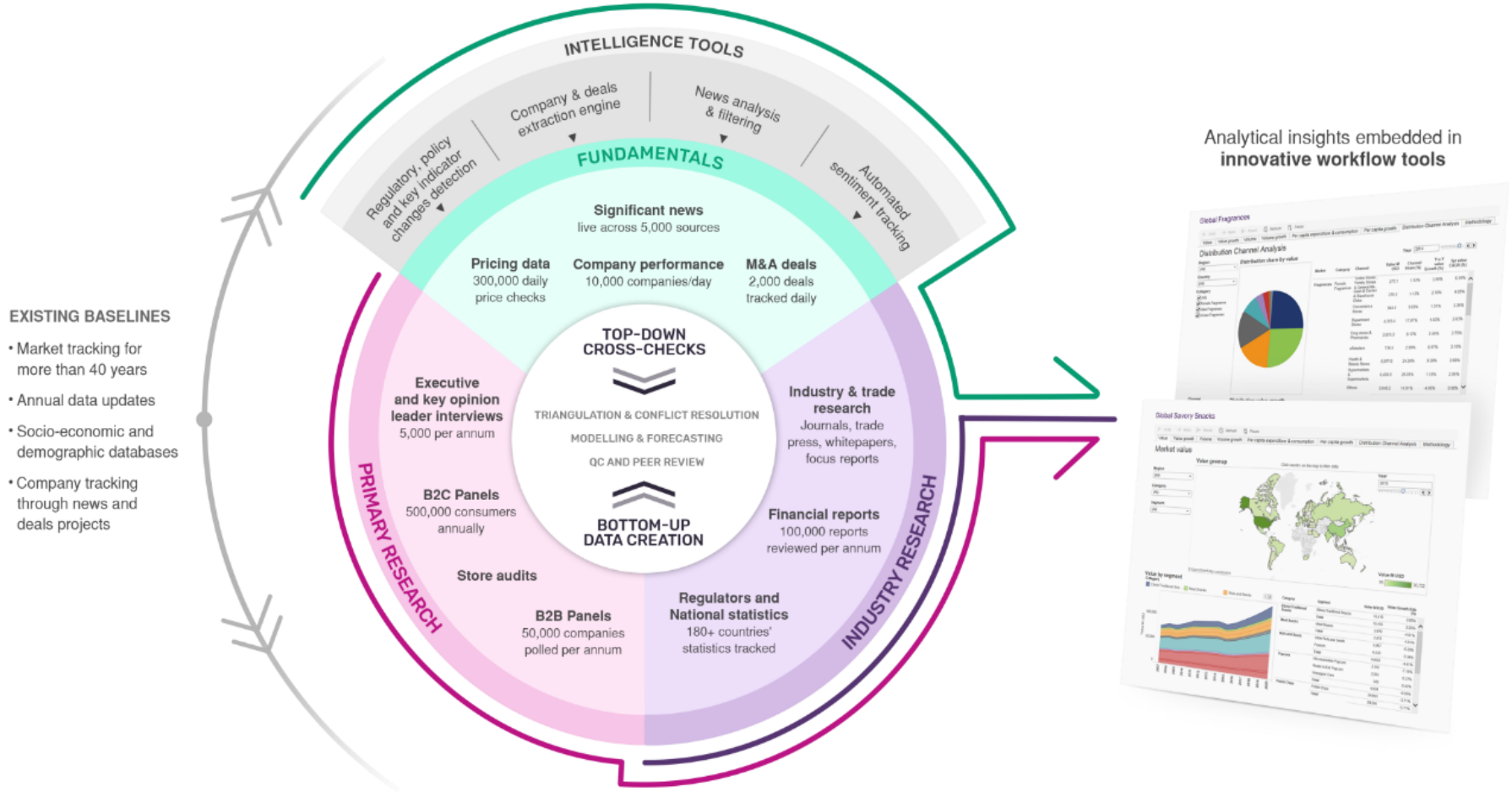
Product research is carried out across 6 primary regions, covering 111 total markets. Through researcher interviews and extensive secondary research, GlobalData have compiled comprehensive macroeconomic and socioeconomic profiles for each market.

01	02	03	04	05	06
North America	**South America**	**East & West Europe**	**Asia**	**Africa & Middle East**	**Oceania**
2 Countries	19 Countries	41 Countries	24 Countries	23 Countries	2 Countries

Research Methodology

Research Methodology - Overview

GlobalData's research methodology is industry-leading and works closely with industry partnerships across the value chain. From suppliers, manufacturers, retailers, and food service providers, GlobalData covers the full market at an unparalleled depth and provides accurate and reliable industry insight and analysis. 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 crosschecks from all perspectives.



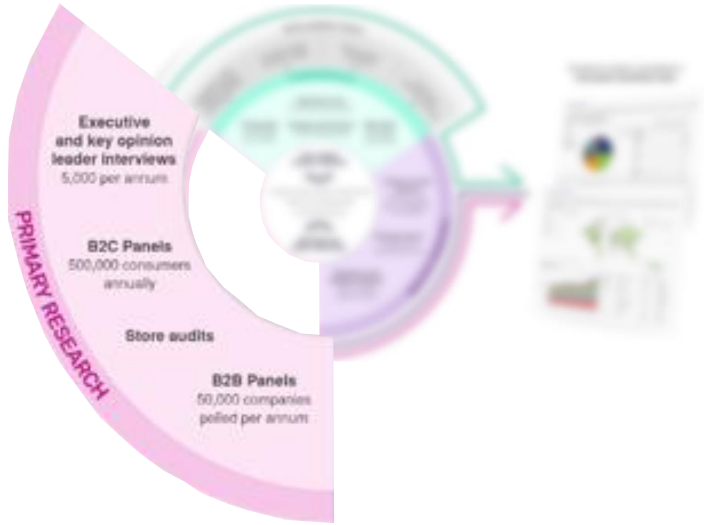
Primary Research

GlobalData operates a global network of highly experienced researchers that conduct local face-to-face industry interviews continuously throughout the year. Our local researchers specialize within the beverages industry and over many years have established a strong and trusted network of research participants across the consumer value chain. Access to these industry research participants provides GlobalData with the latest trends and market estimates, which are highly accurate and timely.

- GlobalData's extensive primary research program helps to establish:
  - Macroeconomic and political conditions influencing beverages consumption
  - Competitor analysis along with identifying key manufacturers and their market share in industry
  - Key factors and growth drivers fueling beverages consumption
  - Latest consumer trends which are likely to impact future performance of categories and segments
  - Distribution and channel specific developments
  - Key marketing strategies and promotional activities of manufacturers and their competitors
  - New brand launches, innovations in product and packaging
  - Prices across categories

- Primary research is conducted **throughout the year** to ensure it captures trends and development seamlessly. All interviews are conducted using a **highly structured primary research guide** and the outputs are audited, documented and analyzed to be fed into the final triangulation process

- The second aspect of primary research is the **store audits** where GlobalData conducts retail shelf space analysis of leading retail stores across all the countries that is included in the research scope. Comprehensive information gathering is conducted at **SKU level** capturing detailed product and packaging information along with the shelf space patter of each brand variant



Few Insight Providers

Industry Research

Information is collected from various reliable publicly available publications.

- GlobalData continuously tracks publicly available published material to understand the beverage industry from a 360-degree perspective.
  - Macroeconomic statistics and developments
  - Industry views by experts
  - News articles
  - Annual reports of companies
  - Government statistics
  - Trade bodies publications
  - Magazines
  - Publicly available key stakeholder interviews
- Publications and news feeds are researched to gather intelligence and insights on the beverages market. All secondary research sources are captured and documented with each source rigorously tagged for various themes to create a strong storyboard
- All secondary inferences and data points collected are also validated through primary interviews to ascertain the impact of these trends in the beverage industry

Few Secondary Sources

Drinks International, just-drinks, American Beverage Association, International Coffee Organization, EuAWE, Food and Agriculture Organization of the United Nations, Distilled Spirits Council of the United States, Unesda Soft Drinks Europe, The Spirits Business, IFBA International Food & Beverage Association, The Grocer, USDA United States Department of Agriculture, POCCTAT Russia, DESTATIS Statistisches Bundesamt, OECD Better Policies for Better Lives, FOOD navigator-asia.com, Progressive Dairy, Beverage daily.com, IWCA International Wine Clubs Association, TBA สมาคมอุตสาหกรรมเครื่องดื่มไทย, OIV International Organisation of Vine and Wine, The Brewers of Europe, Canadian Beverage Association, DAIRY reporter.com

Intelligence Tools

With country analysts acting as a central point, insight and inputs from cutting-edge GlobalData products and services were used across GlobalData's beverages program to enhance both data and insight.

Consumer TrendSights Reports
Allows the analyst to understand the impact of consumer trends, for example health and convenience, on the beverage sector.

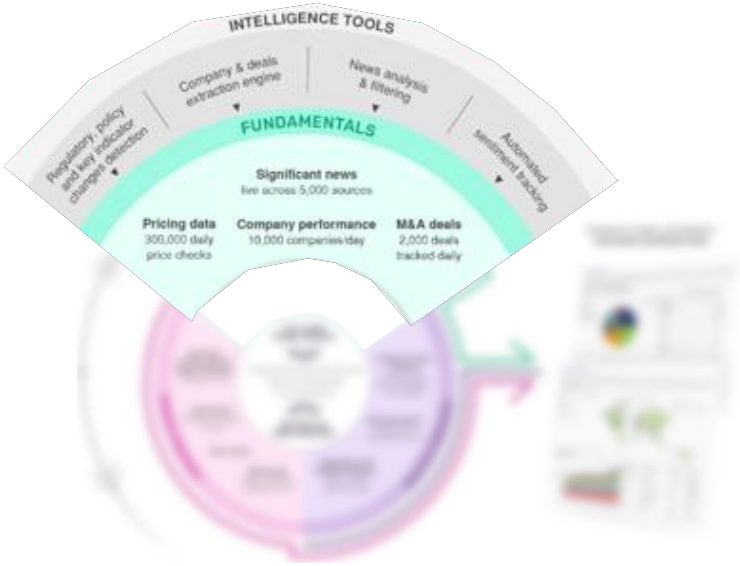
Consumer Surveys
Allows the analysts to access surveys responses from 500,000 consumers across 50 markets. These survey responses are used to assess consumer openness to new beverage ingredients, attitudes to sustainability for example, and how consumer perception is changing over time.

Annual & Quarterly Innovation Reports
Allows the analyst to fully immerse themselves in the nuances of all beverage categories, and indeed sectors and categories that will impact the beverage market.

Influencer & Sentiment Analysis
Tracking the social media activity of key market influencers allows the analyst to assess future drivers of the market.

Disruptor & Thematic
Tracking key sector themes, allows the analyst to understand the impact of these themes on the beverage sector - for example, how will the sustainability theme impact the beverage sector in 2020 and beyond.

News, Companies & M&A Tracking
Allows the analyst to keep abreast of all market information relating to key players in the beverage market.



Product Launch Analytics & Pack Track
Enables the analyst to track new and innovative product launches by country that will impact the beverage market.

Price and Menu Intelligence
Allows the analyst to track price points across both the retail and out of home channels daily. These price points are one input into GlobalData's value database.

Pricing Sources

GlobalData monitors pricing on a global scale using multiple price research techniques to provide accurate retail and foodservice average prices. GlobalData conducts pricing research at SKU by sub-channel level to ensure robust and defendable weighted average prices are published.

Pricing Research Inputs

Daily Retail Price Intelligence

- Over 25k Brands
- Over 164k SKUs
- Regional coverage
- Over 331 leading online retailers

Menu Intelligence

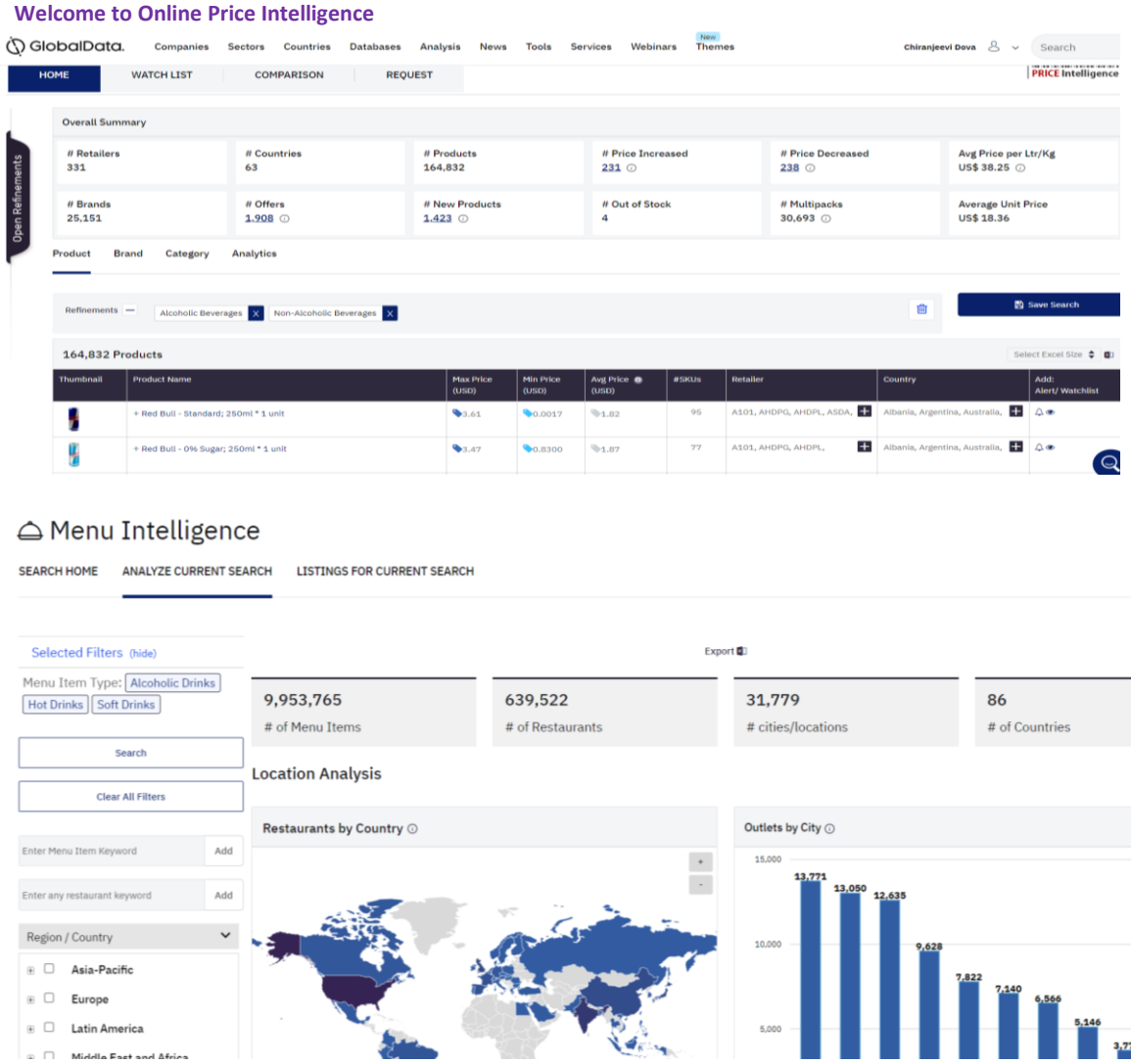
- 9.9 million drink menu items
- 639,552K foodservice establishments
- 31,779 cities
- 86 countries

Quarterly Store and Channel Audits

- Global store audit team dedicated to quarterly price collections
- Cross-channel analysis to captured retail and foodservice
- Nielsen and IRI coverage where available

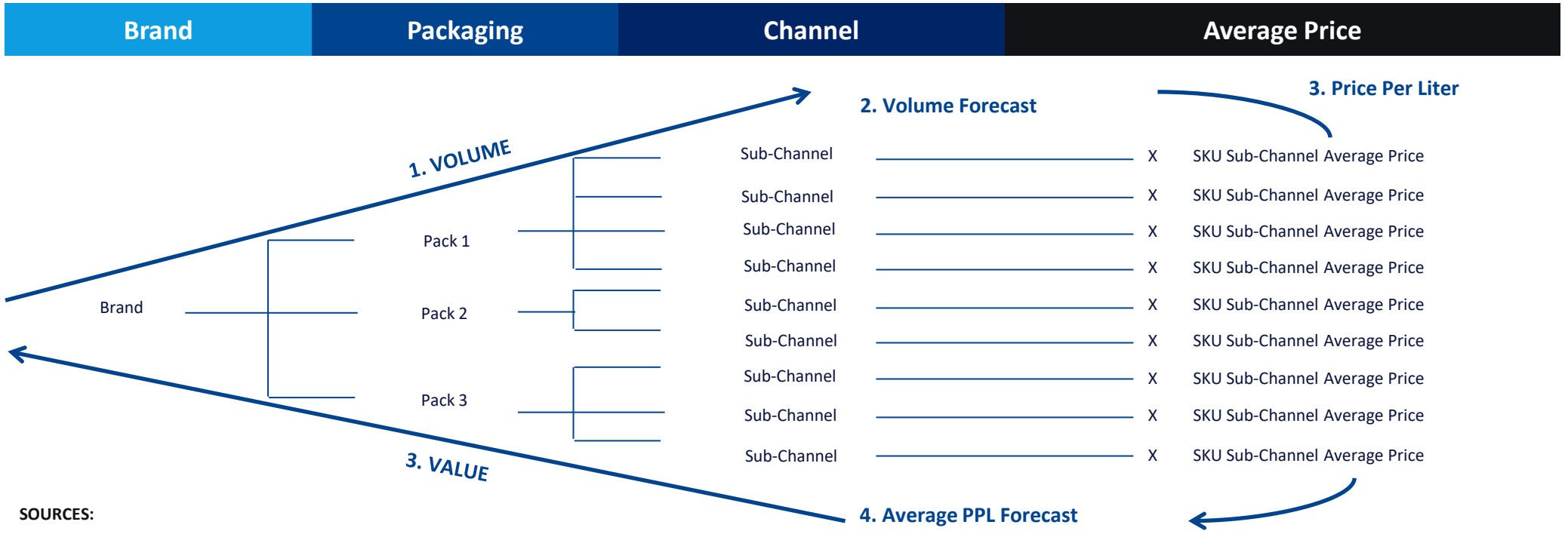
Primary & Secondary Research

- Interviews with Industry Executives
- B2B and B2C surveys
- Company Annual Reports
- Financial Statements
- National Statistics
- Import/Export Data
- Published reports in trade media



Value Methodology

GlobalData fully capitalises on its research strengths - transparent, accurate, defendable volumes and pricing - in order to generate robust interim and annual value and volume data, generating a comprehensive database with over 100 million data points.



SOURCES:

- Manufacturer interviews
- Manufacturer Shipment data (where available)
- Company reports/website
- Daily news
- Desk research

- Packaging interviews
- Bottler/filler interviews
- Manufacturer Shipment data (where available)
- Quarterly store audits
- GlobalData Product Launch Analytics
- Trade press/associations
- Desk research

- Bottler/filler interviews
- Wholesaler interviews
- GlobalData Foodservice
- GlobalData Retail
- Nielsen (where available)
- IRI (where available)
- Desk research

- Quarterly store audits
- GlobalData Retail Price Intelligence
- GlobalData Foodservice Menu Intelligence
- GlobalData Product Launch Analytics
- GlobalData's proprietary price modelling framework
- Nielsen (where available)
- IRI (where available)

Forecast Methodology - Introduction

GlobalData has developed a sophisticated forecasting model that allows stakeholders to plan effectively, giving a sizeable competitive advantage and **maximizing return on investment.**

Confidence

1% year-on-year forecasting variance means decisions can be taken with complete confidence.

Market Drivers

Analyze which inputs are driving the market, so you can tailor your marketing strategy to target the right demographics and trends.

Adaptability

War-game and scenario plan, so you can readily adapt to any situation .

Competitive Insight

Increase market share, combatting competitor strategy, with detailed forecasts at a brand and company level.

Pricing Strategy

Maximize ROI, testing pricing strategies and their effect on volume output and competing brand substitution.

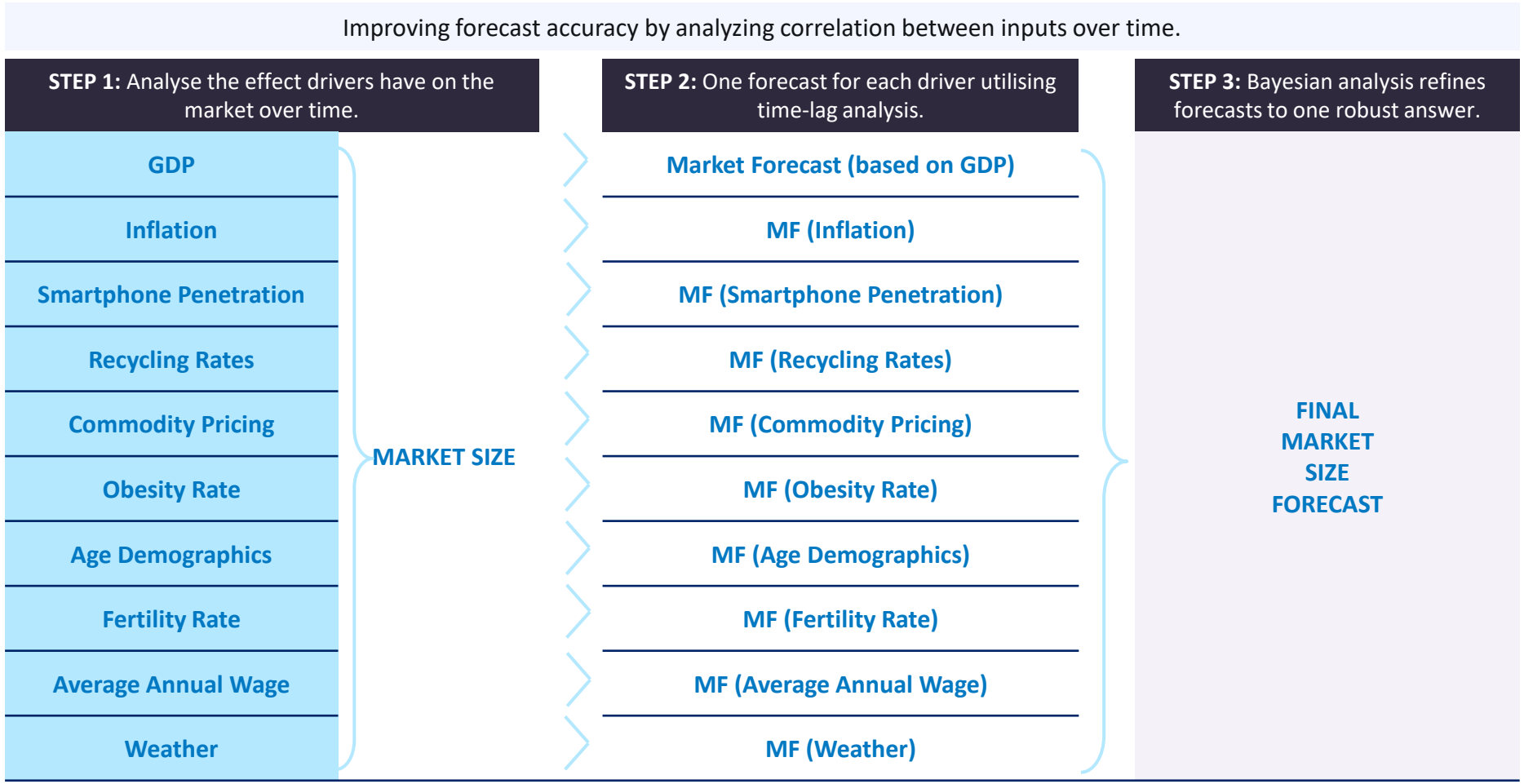
Specific Focusing

Identify and target high value growth areas with SKU level forecasts.

Forecast Methodology - Process

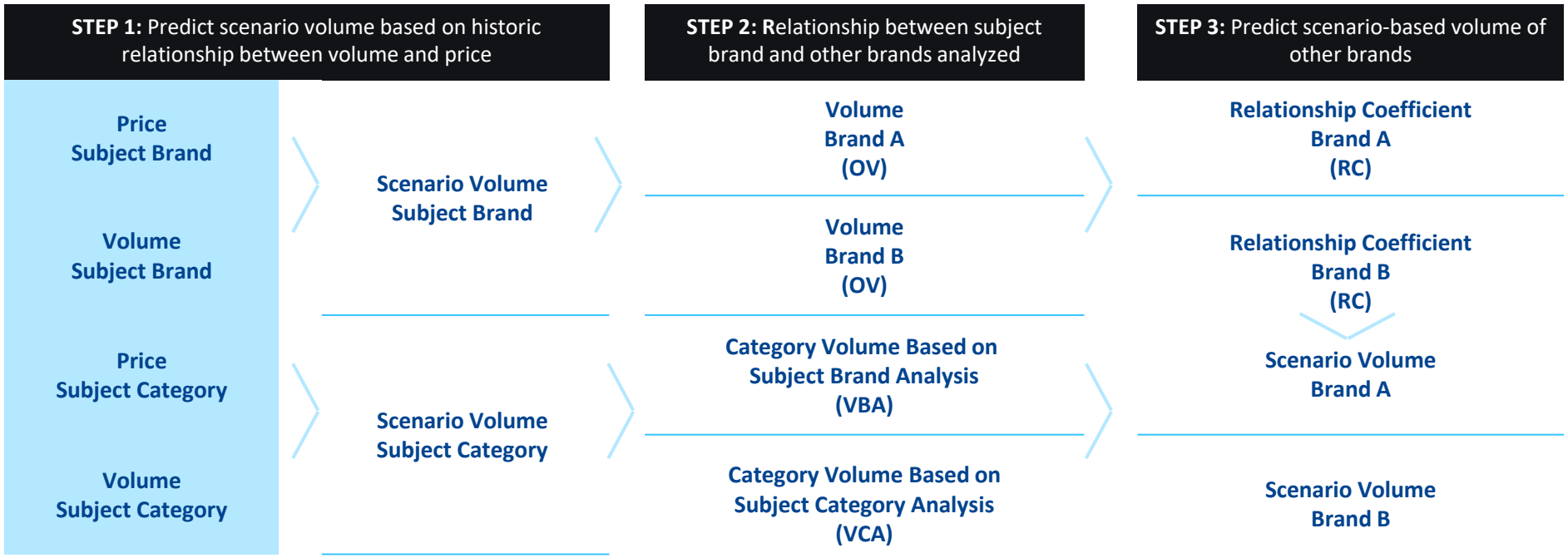
The application of advanced statistical techniques ensures rigor and accuracy in GlobalData's forecasts.

It is achieved by first selecting the most relevant market driver attributes for each product category as each category has different drivers influencing in varied manner. Time-lag analysis is applied on each of these drivers to derive consistent and accurate long-term view. All these drivers are applied using Bayesian analysis to derive forecasts that undergo a series of quality checks before finalizing.



Forecast Methodology - Price Elasticity

Pricing elasticity enables the effective prediction of the impact of pricing changes on market performance.



The historic relationship between volume and price is analyzed for both the brand in question and the category as a whole. This is performed using cross-correlation analysis. Based on this relationship a new prediction is made for the two volumes in question.

The historic relationship between the brand in question and other brands is then analyzed. The size of the category is also calculated based on the price elasticity calculation for the individual brand and the category as a whole.

A relationship coefficient for the competing brands is calculated. The closer the relationship between brand performance, the greater relationship coefficient. Scenario volumes for other brands are calculated as: OV + RC * (VCA - VBA).

Forecast Methodology - Technical USPS

GlobalData's forecast model has **several unique selling points** that separate it from the competition. The accurate predictions that these USPs produce means **detailed future planning** can be undertaken.

Cross-Correlation

A more realistic world and market scenario can be built by utilising time-lag analysis so delayed effects of events upon the market can be examined.

Bayesian Techniques

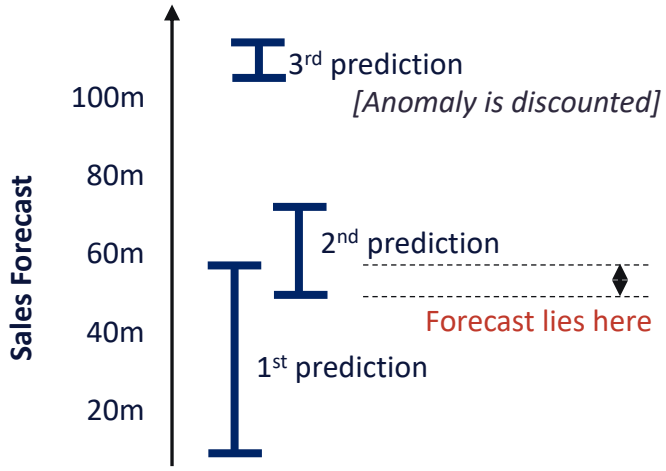
Highly increases the accuracy of predictions to within 1% year-on year. Drivers that affect the market the most have a stronger bearing on the final prediction, again building an ever more realistic scenario.

Price Elasticity

The effect that differing pricing strategies have on volume output can be analysed, not only on the subject brand, but also on competing brands in the market. Optimal pricing strategies can therefore be employed within your organisation, maximising profit margins, market share and ROI.

Driver Data	
Linear Regression	Time-Lag Analysis
2020	2020
2021	2021
2022	2022
2023	2023

2022 Market Data



Forecast Methodology - Review Process

A number of validation processes are employed to ensure the true drivers that are affecting the market are utilized and 1% year-on-year variance maintained.

Driver Effect

Correlations between the market data and proposed drivers are calculated.

Driver Interdependence

Correlations between each driver and every other driver are calculated.

Error Term

The theoretical error term between the market data and each driver is calculated. Data points where this exceeds one percent are flagged.

Reality Testing

Blind forecasts for the last three historic years are undertaken and any data points where year-on-year variance exceeds one percent are flagged.

Final Analysis

The above information is reviewed, and a decision made based on both scientific and logical reasoning as to which drivers should be kept for the final model or if any others need to be added and tested.

Forecast Methodology - Review Process

As well as ensuring that the science behind the methodology is sound, **expert analysts** also review data in depth to ensure **future legislative, consumer, and macro-economic trends** are incorporated.

1) Data is forecasted for all future years including seasonality-adjusted quarterly forecasts utilizing the methodology described and the drivers specified in the following slides. The validation process is reviewed to ensure 1% year-on-year variance is adhered to.

2) Results are reviewed by country market experts, ensuring that forecasted growth represents actual consumer and macro-economic trends in the country. Typically, at this stage 1-2% of data points are flagged.

Data Science Team

3) Affected data points are passed back to the data science team for a second round of forecasting. Suggestions of techniques to incorporate are on boarded and fed through the model.

Expert Analysts

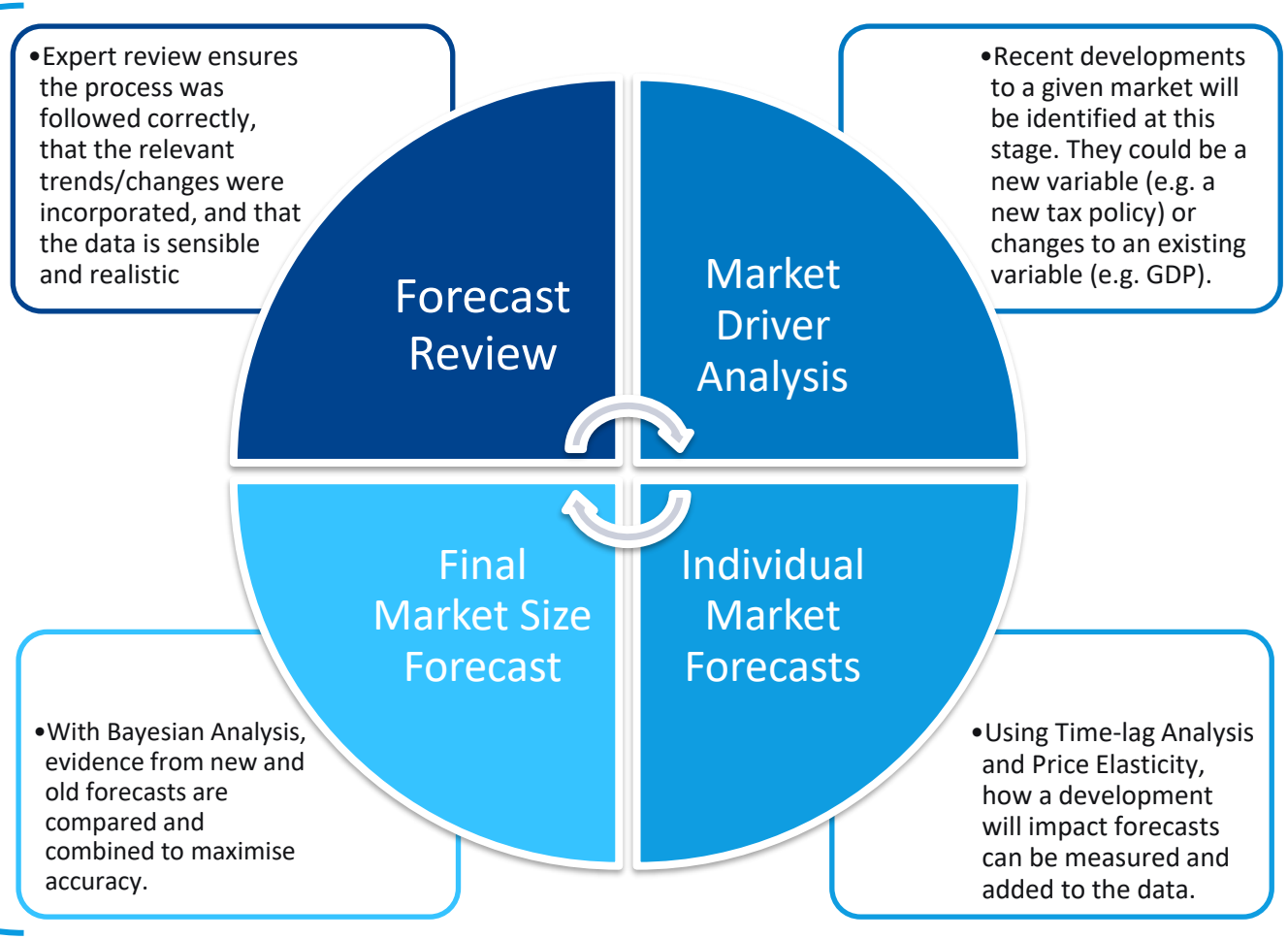
4) A final review is conducted by country experts where any amends are made in the data. Less than 0.5% of data points are flagged at this stage.

Final Forecasts

Forecast Methodology – Monthly Updates

The forecast process – from initial analysis to expert review – is repeated **monthly**. Monthly updates allow GlobalData to stay abreast of any developments within the Soft Drinks industry and ensure forecasts **accurately reflect these developments**.

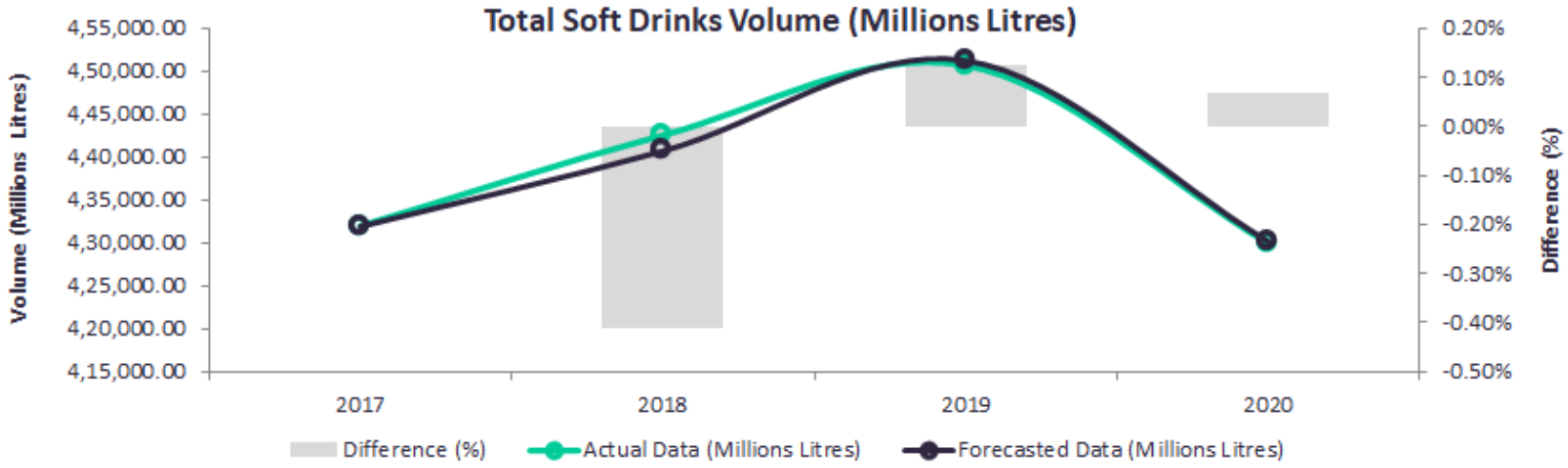
One Full-Month Cycle



Forecast Methodology - Case Study

Below is a case study of the soft drinks market in **10** major global markets where forecasts were undertaken blind for the years **2018–2020.** This showcases the **1% variance** produced by the tool.

Country	2018	2019	2020	2018	2019	2020	2018	2019	2020
Australia	4,846	4,843	4,789	4,828	4,752	4,684	0.38%	1.91%	2.25%
Brazil	31,839	32,292	31,445	31,552	31,700	30,700	0.91%	1.87%	2.43%
China	148,017	153,854	146,994	148,180	153,671	147,342	-0.11%	0.12%	-0.24%
Japan	23,296	23,333	23,973	23,492	23,630	23,819	-0.83%	-1.26%	0.64%
Mexico	55,709	56,630	54,706	56,251	56,610	54,868	-0.96%	0.04%	-0.30%
Nigeria	10,426	11,297	12,509	10,445	11,164	12,356	-0.18%	1.19%	1.23%
Russian Federation	14,421	14,951	14,524	14,434	14,972	14,668	-0.09%	-0.14%	-0.98%
Saudi Arabia	12,142	12,114	12,231	12,212	12,338	12,502	-0.57%	-1.82%	-2.17%
United Kingdom	14,114	13,836	13,207	14,084	13,833	13,195	0.22%	0.02%	0.09%
United States of America	125,876	128,047	115,806	127,024	127,957	115,754	-0.90%	0.07%	0.05%
Total	440,686	451,197	430,182	442,501	450,628	429,888	-0.88%	-0.34%	-0.39%



Restatement Policy

Restatement Policy Overview

GlobalData is committed to publishing accurate and robust consumer intelligence. Occasionally, GlobalData is presented with further research inputs post publication which sometimes calls for information to be updated and republished. GlobalData's Consumer Restatement Policy details the official company process for investigating, approving, implementing and communicating all consumer restatements.

GlobalData has researched and published leading consumer intelligence and analytics for over 5 decades, working closely in industry partnerships with suppliers, manufacturers and distributors, on a global and local level, to provide credible and robust value and volume insights covering the breadth and depth of consumer marketplace dynamics.

As is synonymous to all research agencies, GlobalData assumes small degrees of misalignments in its published services, owing to the varying sources of research inputs received and how they are interpreted. GlobalData is committed to publishing accurate and robust intelligence to all its customers and welcomes all feedback and challenges regarding its research perspectives. As is customary across all GlobalData's syndicated and consulting services, all research and analysis activity is documented in Research Audit files, providing transparency to our beverage's operation.

GlobalData's Consumer Restatement Policy details the official company process for investigating, approving, implementing and communicating all data restatements. It defines restatements and how they differ from data revisions, all stakeholders involved throughout the restatement process, official time restrictions for managing and implementing approved restatements.

GlobalData's Consumer Restatement Policy is endorsed across all consumer sectors

Restatement Policy Definition

Restatements are officially sanctioned retrospective adjustments to previously published data and/or analytical reports. They occur outside of the typical research and analysis publication schedule and necessary to maintaining and protecting GlobalData's research accuracy and credibility.

Status	Description
Misalignment: Logged	When an internal or external stakeholder challenges published data and/or report and requests GlobalData to justify and or change information.
Misalignment: Under Investigation	When GlobalData Analyst team compares all research inputs used to publish latest perspective with new information supplied by internal or external stakeholder and considers the weight of evidence and credibility of all perspectives.
Misalignment: Justified with client agreement	When GlobalData concludes data and/or report should remain unchanged as the weight of evidence (or lack of credible evidence supplied by internal or external stakeholder) remains in GlobalData's favour. Client is satisfied with justifications and accepts no changes will occur.
Misalignment: Justified without client agreement	When GlobalData concludes data and/or report should remain unchanged as the weight of evidence (or lack of credible evidence supplied by internal or external stakeholder) remains in GlobalData's favour. Client perspective remains misaligned to GlobalData's perspective. It is likely GlobalData will add a series of action points to the next publication cycle to further support research in this contested area.
Revision	When GlobalData agrees to adjust previously published data and/or analytical reports following more robust and credible research inputs. These **adjustments take place inside the typical research and analysis publication schedule** i.e. the point when analysts are actively working on a market or when the latest publication is not yet released to clients. Such changes are logged and approved in the Research Audit file and also disclosed to clients in published Data Revision statements as part of the latest publication release.
Restatement	When GlobalData agrees to adjust previously published data and/or analytical reports following more robust and credible research inputs. These **adjustments take place outside the typical research and analysis publication schedule,** yet the adjustment is necessary to maintaining and protecting GlobalData's research accuracy and credibility i.e. the adjustment can't be delayed until the next publication cycle.

Restatement Policy Scope

GlobalData's Beverages Restatement Policy is endorsed across all beverages sectors (Soft, Alcoholic, Hot, Dairy) and is inclusive of data and report restatements.

Scope of Restatement Policy	Soft Drinks	Alcoholic Drinks	Hot Drinks	Dairy Drinks
Global Market Data: Brand Insights Global Market Data: Channel Insights Global Market Data: Segment Insights	✓	✓	✓	✓
Beverages: Quarterly Beverage Forecasts	✓	✓	✓	✓
Beer and Cider: Global Beer Trends Volume Beer and Cider: Brand Volume and Value Beer and Cider: Channel Volume and Value Beer and Cider: Packaging Volume		✓		
Soft Drinks: Brand/Pack/Channel Volume and Value Soft Drinks: Brand Volume and Value Soft Drinks: Channel Volume and Value Soft Drinks: Packaging Volume	✓			
Analysis Reports	✓	✓	✓	✓

Timings

GlobalData offers a five week window **within beverages** following data and report publications for all clients to log any misalignments with data and/or reports

Appendix

Geographic Coverage - Researched Countries by Beverages Sector

GlobalData researches 111 countries across all beverage sectors.

✓ New researched market in 2021

Region/Country	Soft	Hot	Dairy	Beer / Cider	Wins	Spirits
NORTH AMERICA - 2 countries						
1. Canada	✓	✓	✓	✓	✓	✓
2. United States	✓	✓	✓	✓	✓	✓
LATIN AMERICAS - 19 countries						
3. Argentina	✓	✓	✓	✓	✓	✓
4. Bolivia	✓	✓	✓	✓	✓	✓
5. Brazil	✓	✓	✓	✓	✓	✓
6. Chile	✓	✓	✓	✓	✓	✓
7. Colombia	✓	✓	✓	✓	✓	✓
8. Costa Rica	✓	✓	✓	✓	✓	✓
9. Cuba	✓	✓	✓	✓	✓	✓
10. Dominican Republic	✓	✓	✓	✓	✓	✓
11. Ecuador	✓	✓	✓	✓	✓	✓
12. El Salvador	✓	✓	✓	✓	✓	✓
13. Guatemala	✓	✓	✓	✓	✓	✓
14. Honduras	✓	✓	✓	✓	✓	✓
15. Mexico	✓	✓	✓	✓	✓	✓
16. Nicaragua	✓	✓	✓	✓	✓	✓
17. Panama	✓	✓	✓	✓	✓	✓
18. Paraguay	✓	✓	✓	✓	✓	✓
19. Peru	✓	✓	✓	✓	✓	✓
20. Puerto Rico	✓	✓	✓	✓	✓	✓
21. Uruguay	✓	✓	✓	✓	✓	✓
WEST EUROPE - 20 countries						
22. Austria	✓	✓	✓	✓	✓	✓
23. Belgium	✓	✓	✓	✓	✓	✓
24. Denmark	✓	✓	✓	✓	✓	✓
25. Finland	✓	✓	✓	✓	✓	✓
26. France	✓	✓	✓	✓	✓	✓
27. Germany	✓	✓	✓	✓	✓	✓
28. Greece	✓	✓	✓	✓	✓	✓
29. Iceland	✓	✓	✓	✓	✓	✓
30. Ireland	✓	✓	✓	✓	✓	✓
31. Italy	✓	✓	✓	✓	✓	✓
32. Luxembourg	✓	✓	✓	✓	✓	✓
33. Malta	✓	✓	✓	✓	✓	✓
34. Netherlands	✓	✓	✓	✓	✓	✓
35. Norway	✓	✓	✓	✓	✓	✓
36. Portugal	✓	✓	✓	✓	✓	✓
37. Spain	✓	✓	✓	✓	✓	✓
38. Sweden	✓	✓	✓	✓	✓	✓
39. Switzerland	✓	✓	✓	✓	✓	✓
40/41. UK (GB + NI)	✓	✓	✓	✓	✓	✓
EAST EUROPE - 21 countries						
42. Belarus	✓	✓	✓	✓	✓	✓
43. Bosnia	✓	✓	✓	✓	✓	✓
44. Bulgaria	✓	✓	✓	✓	✓	✓
45. Croatia	✓	✓	✓	✓	✓	✓
46. Czech Republic	✓	✓	✓	✓	✓	✓
47. Estonia	✓	✓	✓	✓	✓	✓
48. Hungary	✓	✓	✓	✓	✓	✓
49. Kosovo	✓	✓	✓	✓	✓	✓
50. Latvia	✓	✓	✓	✓	✓	✓
51. Lithuania	✓	✓	✓	✓	✓	✓
52. Macedonia	✓	✓	✓	✓	✓	✓
53. Moldova	✓	✓	✓	✓	✓	✓
54. Montenegro	✓	✓	✓	✓	✓	✓
55. Poland	✓	✓	✓	✓	✓	✓
56. Romania	✓	✓	✓	✓	✓	✓
57. Russia	✓	✓	✓	✓	✓	✓
58. Serbia	✓	✓	✓	✓	✓	✓
59. Slovak Republic	✓	✓	✓	✓	✓	✓
60. Slovenia	✓	✓	✓	✓	✓	✓
61. Turkey	✓	✓	✓	✓	✓	✓
62. Ukraine	✓	✓	✓	✓	✓	✓
MIDDLE EAST & AFRICA x 23 countries						
63. Algeria	✓	✓	✓	✓	✓	✓
64. Angola	✓	✓	✓	✓	✓	✓
65. Bahrain	✓	✓	✓	✓	✓	✓
66. Egypt	✓	✓	✓	✓	✓	✓
67. Ethiopia	✓	✓	✓	✓	✓	✓
68. Ghana	✓	✓	✓	✓	✓	✓
69. Iran	✓	✓	✓	-	✓	✓
70. Iraq	✓	✓	✓	✓	✓	✓
71. Israel	✓	✓	✓	✓	✓	✓
72. Jordan	✓	✓	✓	✓	✓	✓
73. Kenya	✓	✓	✓	✓	✓	✓
74. Kuwait	✓	✓	✓	-	✓	✓
75. Lebanon	✓	✓	✓	✓	✓	✓
76. Morocco	✓	✓	✓	✓	✓	✓
77. Nigeria	✓	✓	✓	✓	✓	✓
78. Oman	✓	✓	✓	✓	✓	✓
79. Qatar	✓	✓	✓	✓	✓	✓
80. Saudi Arabia	✓	✓	✓	-	✓	✓
81. South Africa	✓	✓	✓	✓	✓	✓
82. Sudan	✓	✓	✓	-	✓	✓
83. Syria	✓	✓	✓	✓	✓	✓
84. Tunisia	✓	✓	✓	✓	✓	✓
85. United Arab Emirates	✓	✓	✓	✓	✓	✓
ASIA PACIFIC x 26 countries						
86. Armenia	✓	✓	✓	✓	✓	✓
87. Australia	✓	✓	✓	✓	✓	✓
88. Azerbaijan	✓	✓	✓	✓	✓	✓
89. Bangladesh	✓	✓	✓	-	✓	✓
90. Burma (Myanmar)	✓	✓	✓	✓	✓	✓
91. China	✓	✓	✓	✓	✓	✓
92. Georgia	✓	✓	✓	✓	✓	✓
93. Hong Kong	✓	✓	✓	✓	✓	✓
94. India	✓	✓	✓	✓	✓	✓
95. Indonesia	✓	✓	✓	✓	✓	✓
96. Japan	✓	✓	✓	✓	✓	✓
97. Kazakhstan	✓	✓	✓	✓	✓	✓
98. Kyrgyzstan	✓	✓	✓	✓	✓	✓
99. Macau	✓	✓	✓	✓	✓	✓
100. Malaysia	✓	✓	✓	✓	✓	✓
101. New Zealand	✓	✓	✓	✓	✓	✓
102. Pakistan	✓	✓	✓	✓	✓	✓
103. Philippines	✓	✓	✓	✓	✓	✓
104. Singapore	✓	✓	✓	✓	✓	✓
105. South Korea	✓	✓	✓	✓	✓	✓
106. Sri Lanka	✓	✓	✓	✓	✓	✓
107. Taiwan	✓	✓	✓	✓	✓	✓
108. Thailand	✓	✓	✓	✓	✓	✓
109. Turkmenistan	✓	✓	✓	✓	✓	✓
110. Uzbekistan	✓	✓	✓	✓	✓	✓
111. Vietnam	✓	✓	✓	✓	✓	✓

Geographic Coverage - Other Country Balancers

For all other smaller countries which make up the remaining global value and volume, category top lines are modelled using regional per capita figure and country population data. These countries are referred to as “Other Country Balancers”.

Region/Country	Soft	Hot	Dairy	Beer / Cider	Wins	Spirits
LATIN AMERICA						
112. Anguilla	✓	✓	✓	✓	✓	✓
113. Antigua and Barbuda	✓	✓	✓	✓	✓	✓
114. Aruba	✓	✓	✓	✓	✓	✓
115. Bahamas	✓	✓	✓	✓	✓	✓
116. Barbados	✓	✓	✓	✓	✓	✓
117. Belize	✓	✓	✓	✓	✓	✓
118. Bermuda	✓	✓	✓	✓	✓	✓
119. Cayman Islands	✓	✓	✓	✓	✓	✓
120. Curacao	✓	✓	✓	✓	✓	✓
121. Dominica	✓	✓	✓	✓	✓	✓
122. Falkland Islands	✓	✓	✓	✓	✓	✓
123. French Guiana	✓	✓	✓	✓	✓	✓
124. Grenada	✓	✓	✓	✓	✓	✓
125. Guadeloupe	✓	✓	✓	✓	✓	✓
126. Guyana	✓	✓	✓	✓	✓	✓
127. Haiti	✓	✓	✓	✓	✓	✓
128. Jamaica	✓	✓	✓	✓	✓	✓
129. Martinique	✓	✓	✓	✓	✓	✓
130. Montserrat	✓	✓	✓	✓	✓	✓
131. St Kitts and Nevis	✓	✓	✓	✓	✓	✓
132. St Lucia	✓	✓	✓	✓	✓	✓
133. Suriname	✓	✓	✓	✓	✓	✓
134. Trinidad and Tobago	✓	✓	✓	✓	✓	✓
135. Turks & Caicos	✓	✓	✓	✓	✓	✓
WEST EUROPE						
136. Andorra	✓	✓	✓	✓	✓	✓
137. Cyprus	✓	✓	✓	✓	✓	✓
138. Faroe Islands	✓	✓	✓	✓	✓	✓

Region/Country	Soft	Hot	Dairy	Beer / Cider	Wins	Spirits
139. Greenland	✓	✓	✓	✓	✓	✓
140. Liechtenstein	✓	✓	✓	✓	✓	✓
141. Monaco	✓	✓	✓	✓	✓	✓
142. Republic of San Marino	✓	✓	✓	✓	✓	✓
EAST EUROPE						
143. Albania	✓	✓	✓	✓	✓	✓
MIDDLE EAST & AFRICA						
144. Benin	✓	✓	✓	✓	✓	✓
145. Botswana	✓	✓	✓	✓	✓	✓
146. Burkina Faso	✓	✓	✓	✓	✓	✓
147. Burundi	✓	✓	✓	✓	✓	✓
148. Cameroon	✓	✓	✓	✓	✓	✓
149. Cape Verde	✓	✓	✓	✓	✓	✓
150. Chad	✓	✓	✓	✓	✓	✓
151. Comoros	✓	✓	✓	✓	✓	✓
152. Congo (Republic)	✓	✓	✓	✓	✓	✓
153. Djibouti	✓	✓	✓	✓	✓	✓
154. Equatorial Guinea	✓	✓	✓	✓	✓	✓
155. Eritrea	✓	✓	✓	✓	✓	✓
156. Gabon	✓	✓	✓	✓	✓	✓
157. Gambia	✓	✓	✓	✓	✓	✓
158. Guinea	✓	✓	✓	✓	✓	✓
159. Guinea Bissau	✓	✓	✓	✓	✓	✓
160. Ivory Coast	✓	✓	✓	✓	✓	✓
161. Lesotho	✓	✓	✓	✓	✓	✓
162. Liberia	✓	✓	✓	✓	✓	✓
163. Madagascar	✓	✓	✓	✓	✓	✓
164. Malawi	✓	✓	✓	✓	✓	✓

Region/Country	Soft	Hot	Dairy	Beer / Cider	Wins	Spirits
165. Mali	✓	✓	✓	✓	✓	✓
166. Mauritania	✓	✓	✓	✓	✓	✓
167. Mauritius	✓	✓	✓	✓	✓	✓
168. Mozambique	✓	✓	✓	✓	✓	✓
169. Namibia	✓	✓	✓	✓	✓	✓
170. Niger	✓	✓	✓	✓	✓	✓
171. Palestinian Territories	✓	✓	✓	✓	✓	✓
172. Rwanda	✓	✓	✓	✓	✓	✓
173. Senegal	✓	✓	✓	✓	✓	✓
174. Seychelles	✓	✓	✓	✓	✓	✓
175. Sierra Leone	✓	✓	✓	✓	✓	✓
176. Swaziland	✓	✓	✓	✓	✓	✓
177. Tanzania	✓	✓	✓	✓	✓	✓
178. Togo	✓	✓	✓	✓	✓	✓
179. Uganda	✓	✓	✓	✓	✓	✓
180. Western Sahara	✓	✓	✓	✓	✓	✓
181. Yemen	✓	✓	✓	✓	✓	✓
182. Zambia	✓	✓	✓	✓	✓	✓
183. Zimbabwe	✓	✓	✓	✓	✓	✓
ASIA PACIFIC						
184. American Samoa	✓	✓	✓	✓	✓	✓
185. Bhutan	✓	✓	✓	✓	✓	✓
186. Brunei	✓	✓	✓	✓	✓	✓
187. Cambodia	✓	✓	✓	✓	✓	✓
188. Cook Islands	✓	✓	✓	✓	✓	✓
189. East Timor	✓	✓	✓	✓	✓	✓
190. Federated States of Micronesia	✓	✓	✓	✓	✓	✓
191. Fiji	✓	✓	✓	✓	✓	✓
192. French Polynesia	✓	✓	✓	✓	✓	✓

✓ New modelled market in 2021

✓ (Premium) Syndicated Caribbean Service

✓ Beer Minor Markets program

Region/Country	Soft	Hot	Dairy	Beer / Cider	Wins	Spirits
193. Guam	✓	✓	✓	✓	✓	✓
194. Kiribati	✓	✓	✓	✓	✓	✓
195. Laos	✓	✓	✓	✓	✓	✓
196. Maldives	✓	✓	✓	✓	✓	✓
197. Marshall Islands	✓	✓	✓	✓	✓	✓
198. Mongolia	✓	✓	✓	✓	✓	✓
199. Nauru	✓	✓	✓	✓	✓	✓
200. Nepal	✓	✓	✓	✓	✓	✓
201. New Caledonia	✓	✓	✓	✓	✓	✓
202. Niue	✓	✓	✓	✓	✓	✓
203. Palau	✓	✓	✓	✓	✓	✓
204. Papua New Guinea	✓	✓	✓	✓	✓	✓
205. Samoa	✓	✓	✓	✓	✓	✓
206. Solomon Islands	✓	✓	✓	✓	✓	✓
207. Tajikistan	✓	✓	✓	✓	✓	✓
208. Tonga	✓	✓	✓	✓	✓	✓

Please note, specific annual research is conducted by GlobalData for its Syndicated Caribbean service and Beer Minor Market program. Results from these services will be aligned at category top line level.

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GlobalData is a leading provider of data, analytics, and insights on the world's largest industries.

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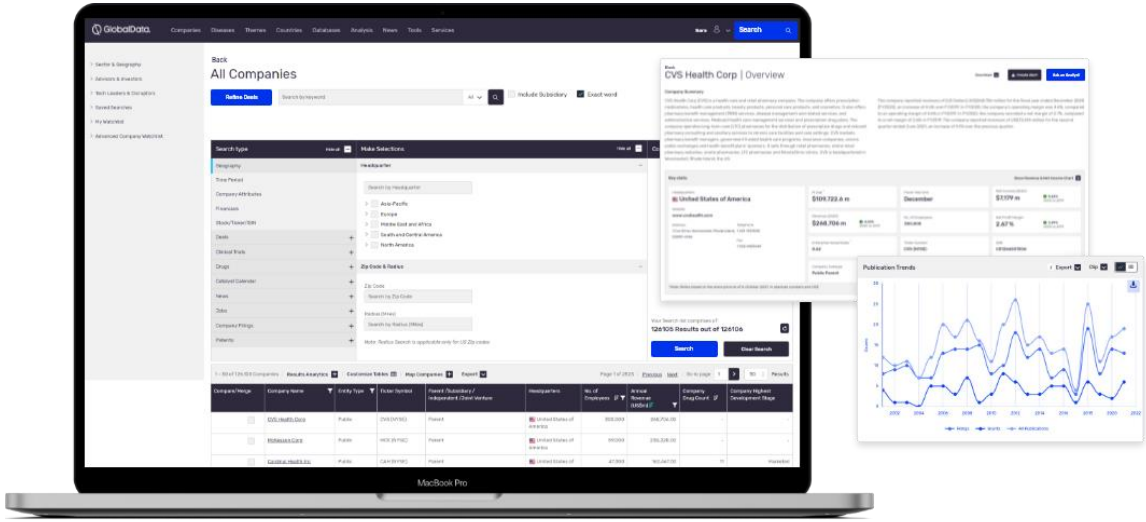

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We leverage the collective expertise of over 2,000 in-house industry analysts, data scientists, and journalists, as well as a global community of industry professionals, to provide decision-makers with timely, actionable insight.

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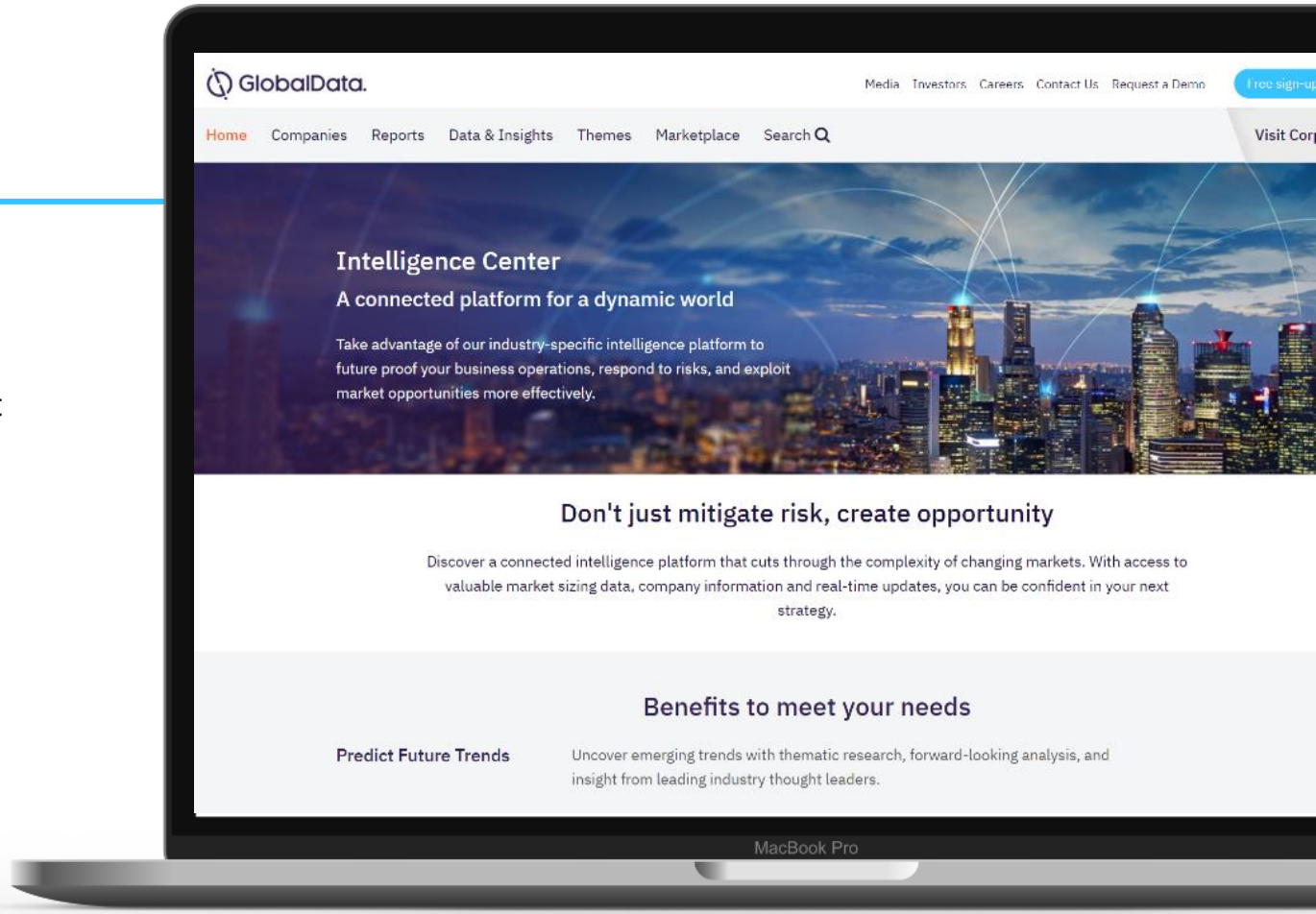
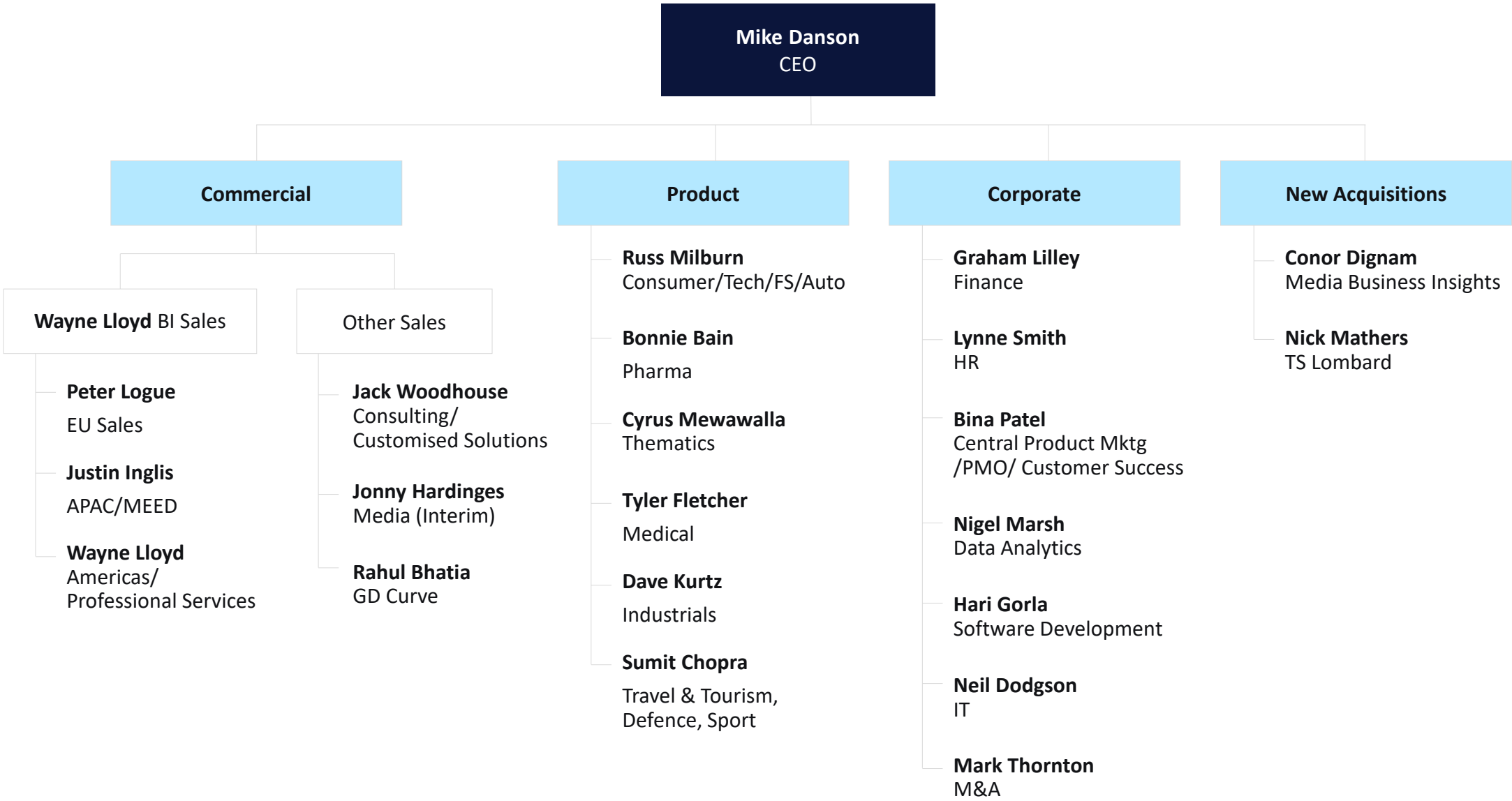


The Team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