



BEVERAGES MARKET EVOLUTION WITHIN HORECA

2005 - 2006

*Grow your business profitably
in a complex marketplace.*

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RETAIL TRACKING SERVICES INFORMATION
RESOURCES, INC.

Agenda

- § **HORECA UNIVERSE**
- § **BEVERAGES MARKET**
- § **ALCOHOLIC DRINKS**
- § **NON-ALCOHOLIC DRINKS**



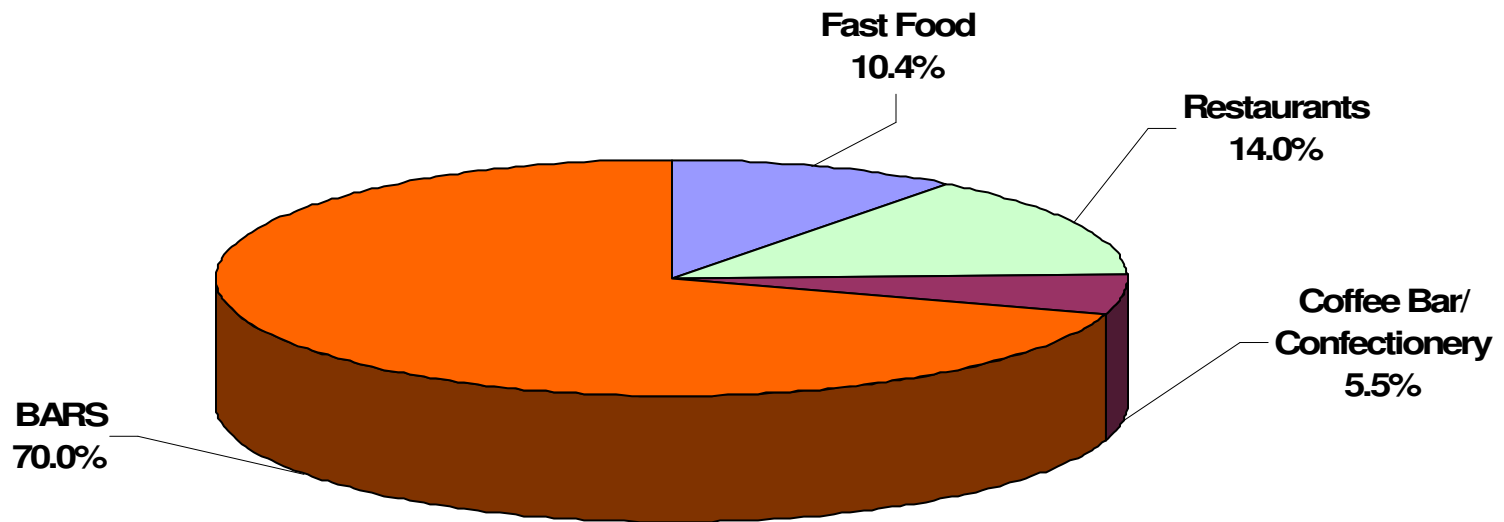


HORECA UNIVERSE

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HORECA Market Universe - Romania 2006 (number of locations)



Source: MEMRB Censuses

HORECA Market Evolution (number of locations) 2002 - 2006

YEAR		2002	2003	2004	2005	2006
Fast Food	base		1.3%	7.5%	22.1%	55.4%
Restaurants	base		2.4%	10.7%	26.1%	17.2%
Coffee Bar/Confectionary	base		-4.4%	-14.5%	-13.7%	-33.8%
BARS	base		-0.7%	-6.4%	-6.4%	-14.3%
Total HORECA	base		-0.5%	-4.3%	-1.6%	-8.0%

Source: MEMRB Censuses



BEVERAGES MARKET EVOLUTION

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BEVERAGES CATEGORIES

ALCOHOLIC BEVERAGES

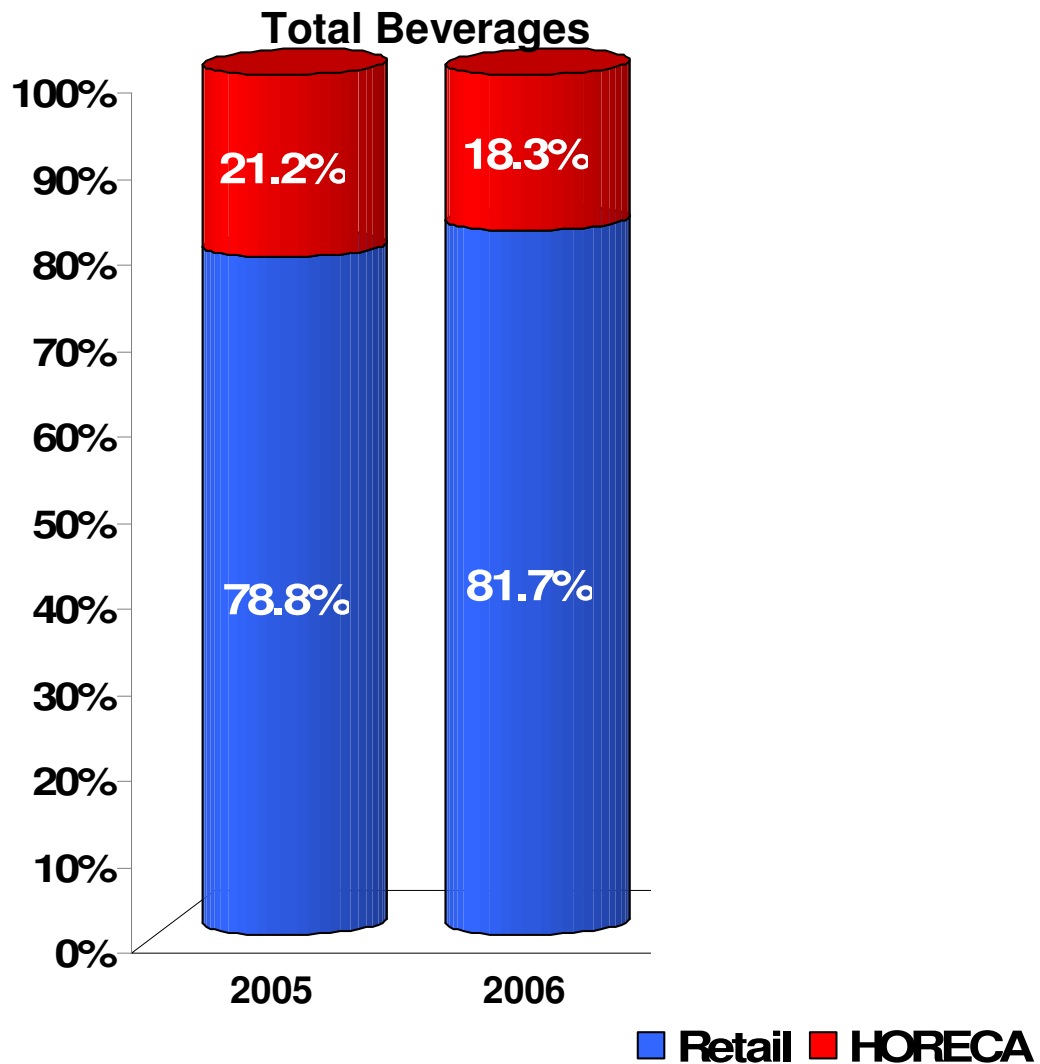
- ↳ SPIRITUOUS DRINKS
- ↳ BITTER
- ↳ BEER
- ↳ BRANDY
- ↳ CHAMPAIGN
- ↳ GIN
- ↳ LIQUEUR
- ↳ VERMOUTH
- ↳ VODKA
- ↳ WINE

NON-ALCOHOLIC BEVERAGES

- ↳ CARBONATED SOFT DRINKS
- ↳ ENERGY DRINKS
- ↳ ICE TEA
- ↳ STILL DRINKS/NECTARS/JUICES
- ↳ MINERAL WATER

HORECA importance in total FMCG sales (HL)

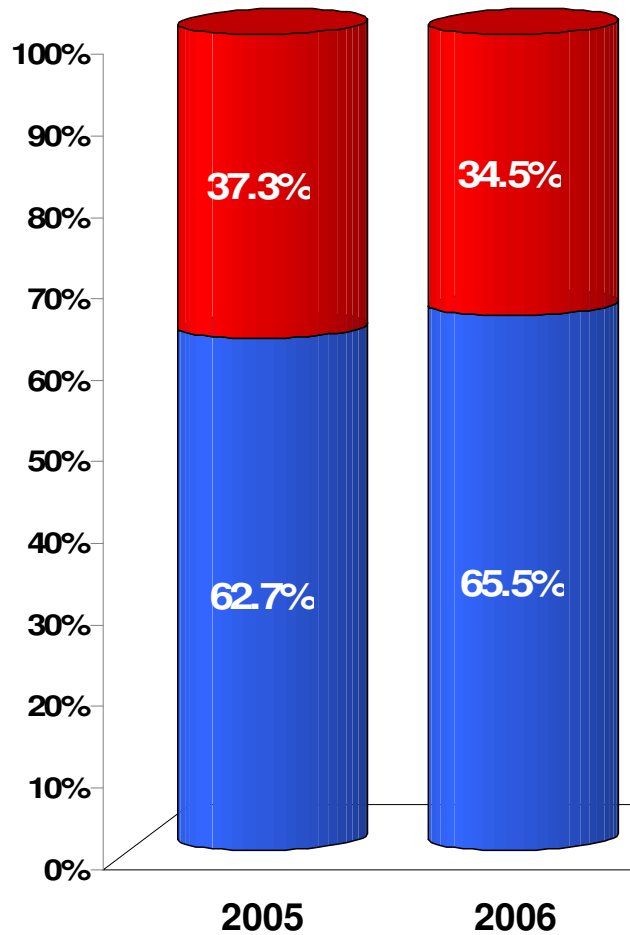
Sales Volume



HORECA importance in total FMCG sales (RON)

Sales Value

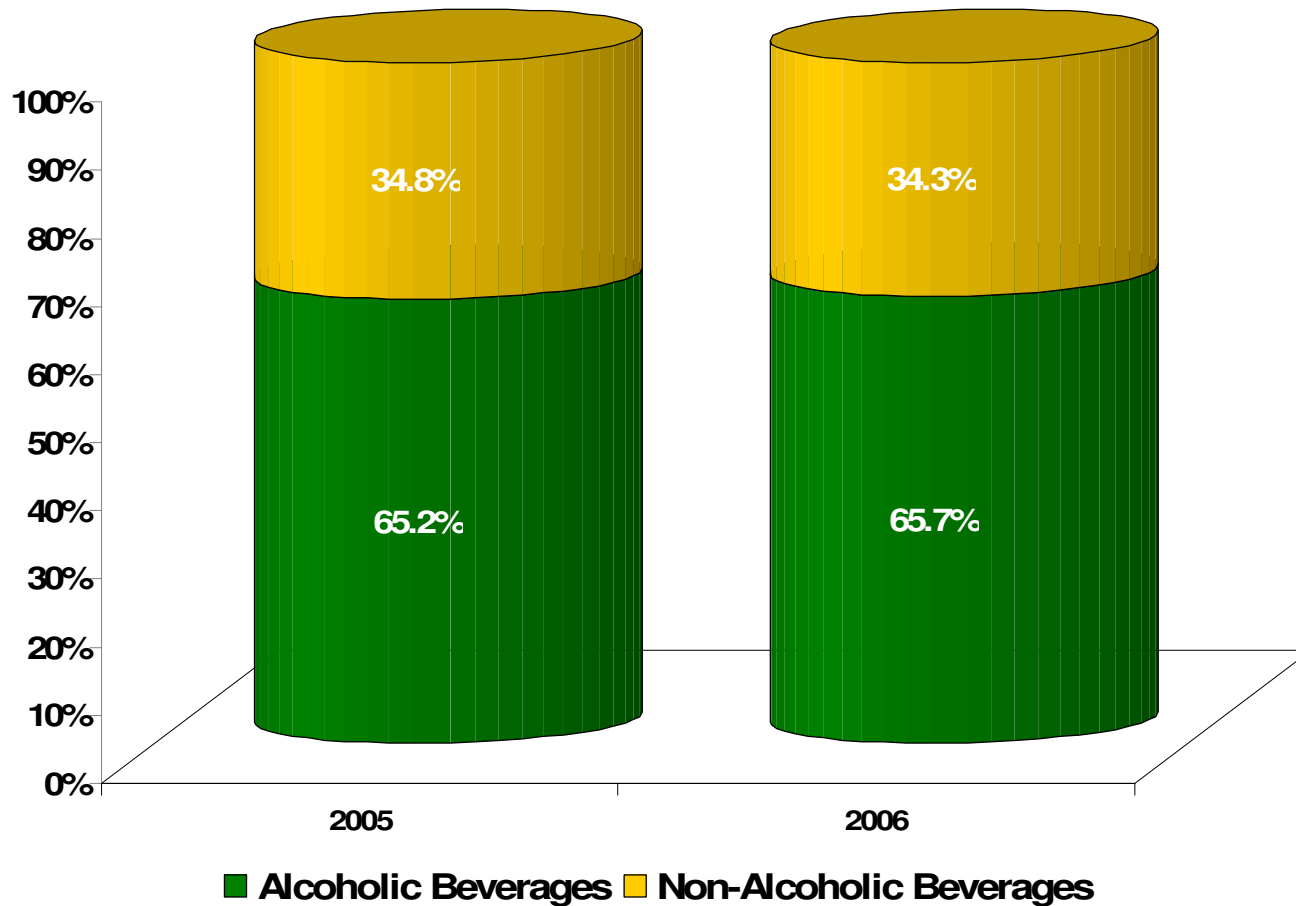
Total Beverages



■ Retail ■ HORECA

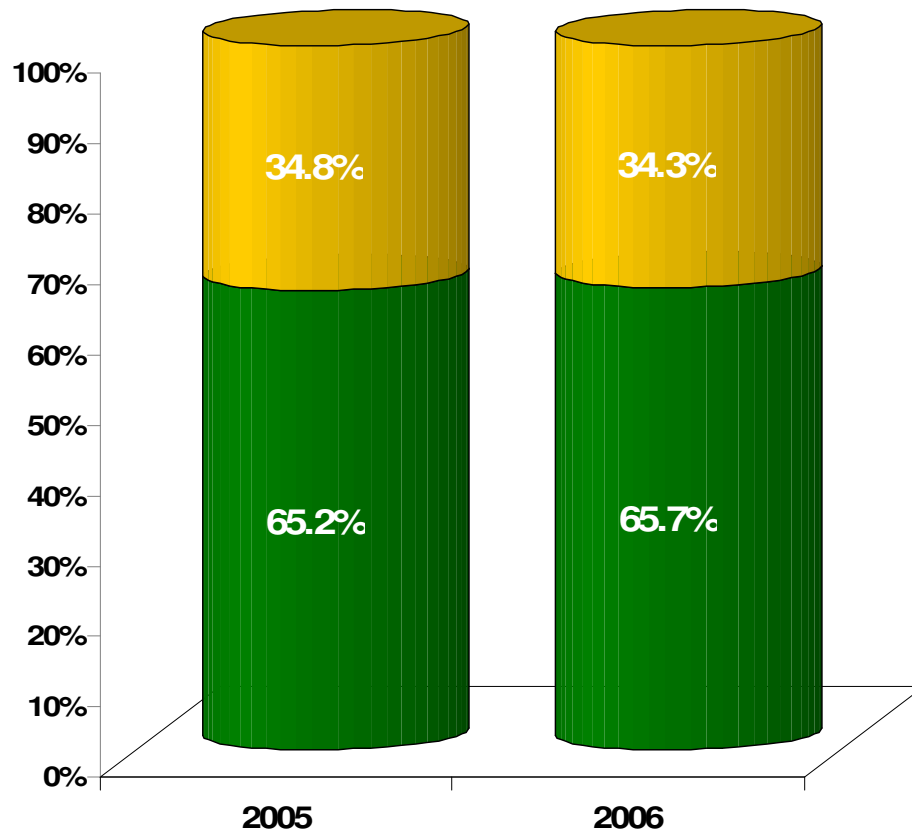
HORECA market structure - 2006 vs 2005

Sales Volume

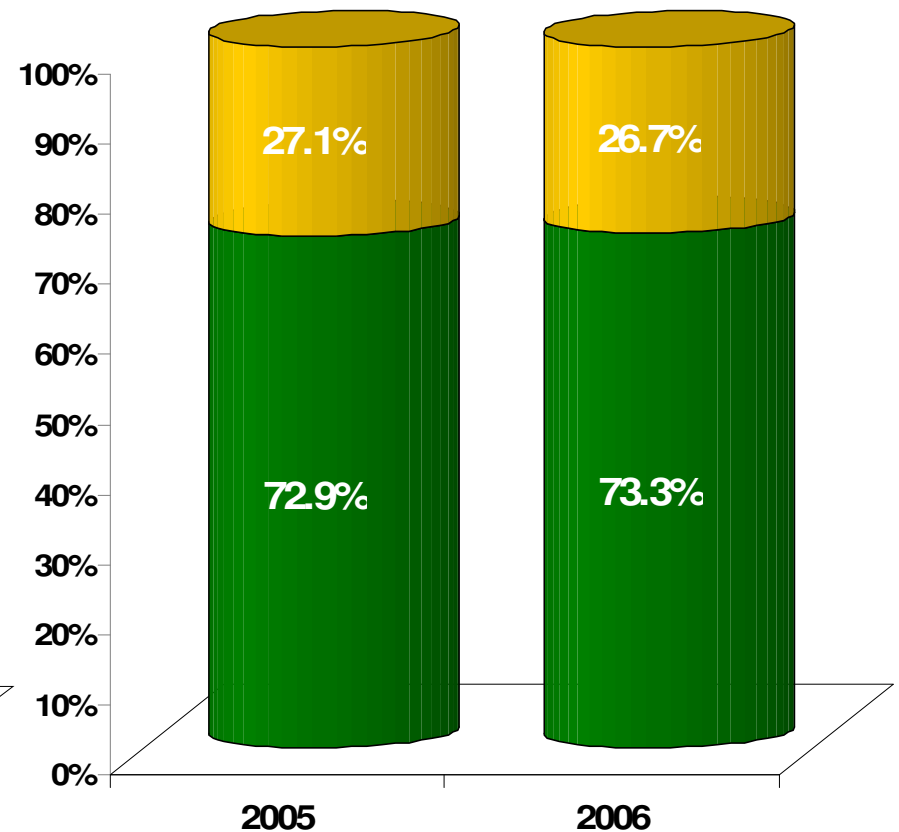


HORECA market structure - 2006 vs 2005

Sales Volume



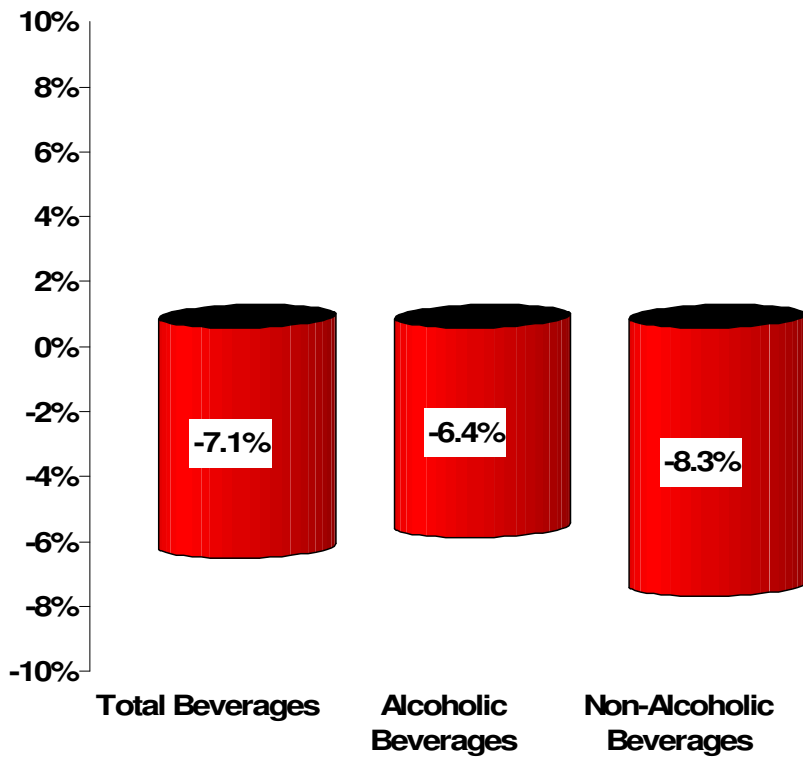
Sales Value



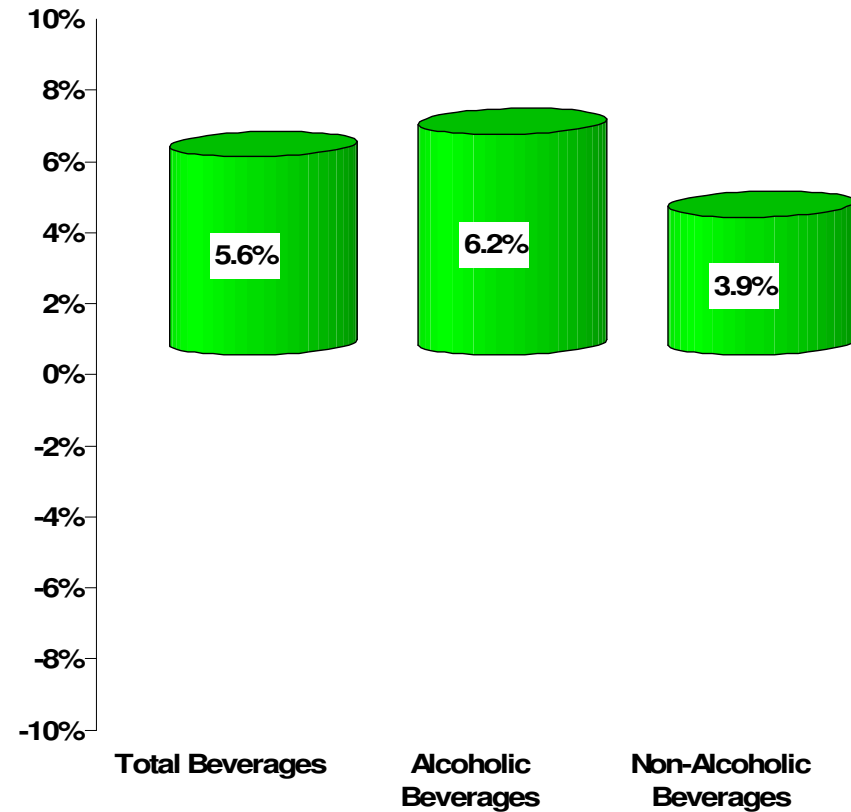
■ Alcoholic Beverages ■ Non-Alcoholic Beverages

HORECA market size development - 2006 vs 2005

Sales Volume



Sales Value





ALCOHOLIC DRINKS EVOLUTION

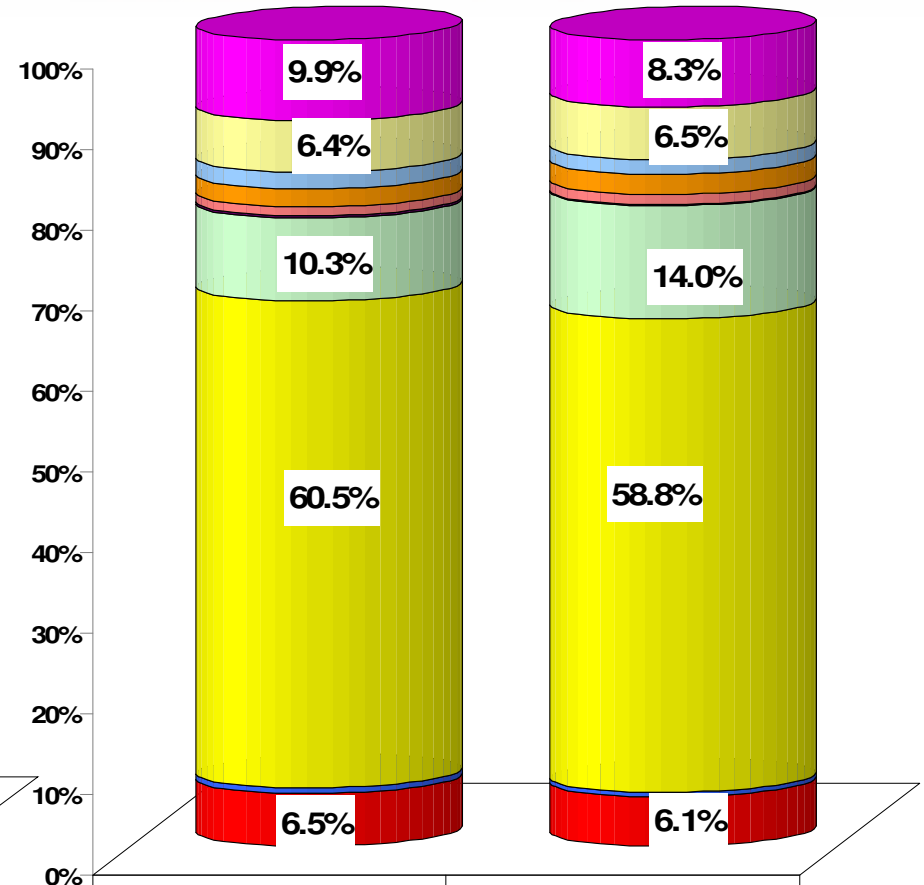
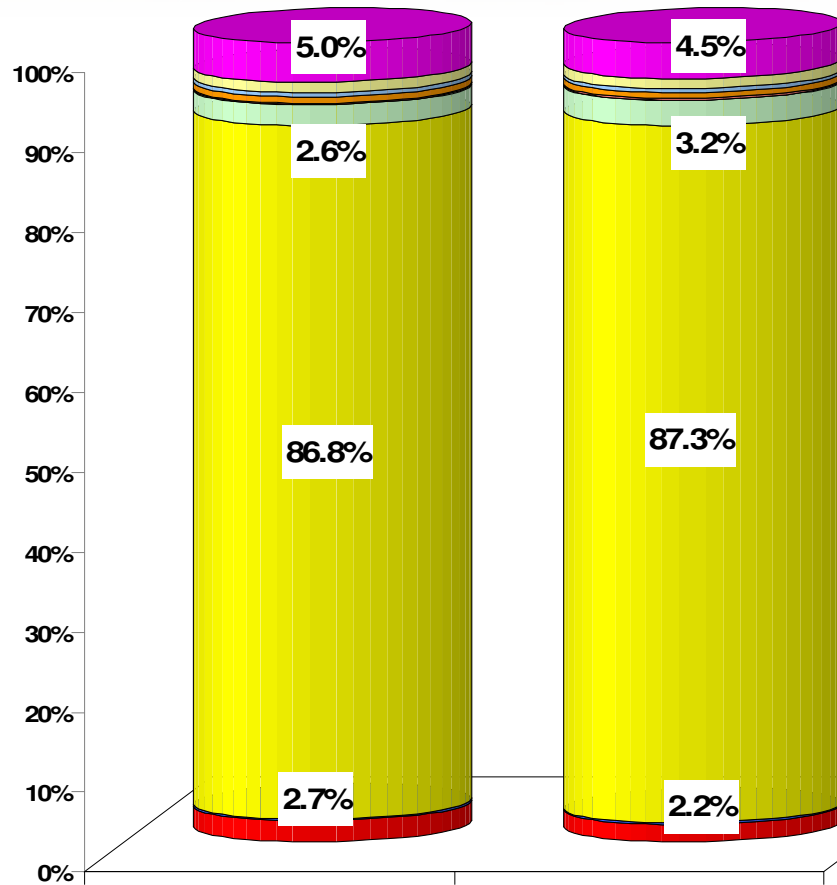
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Alcoholic Drinks - categories importance

Sales Volume

Sales Value



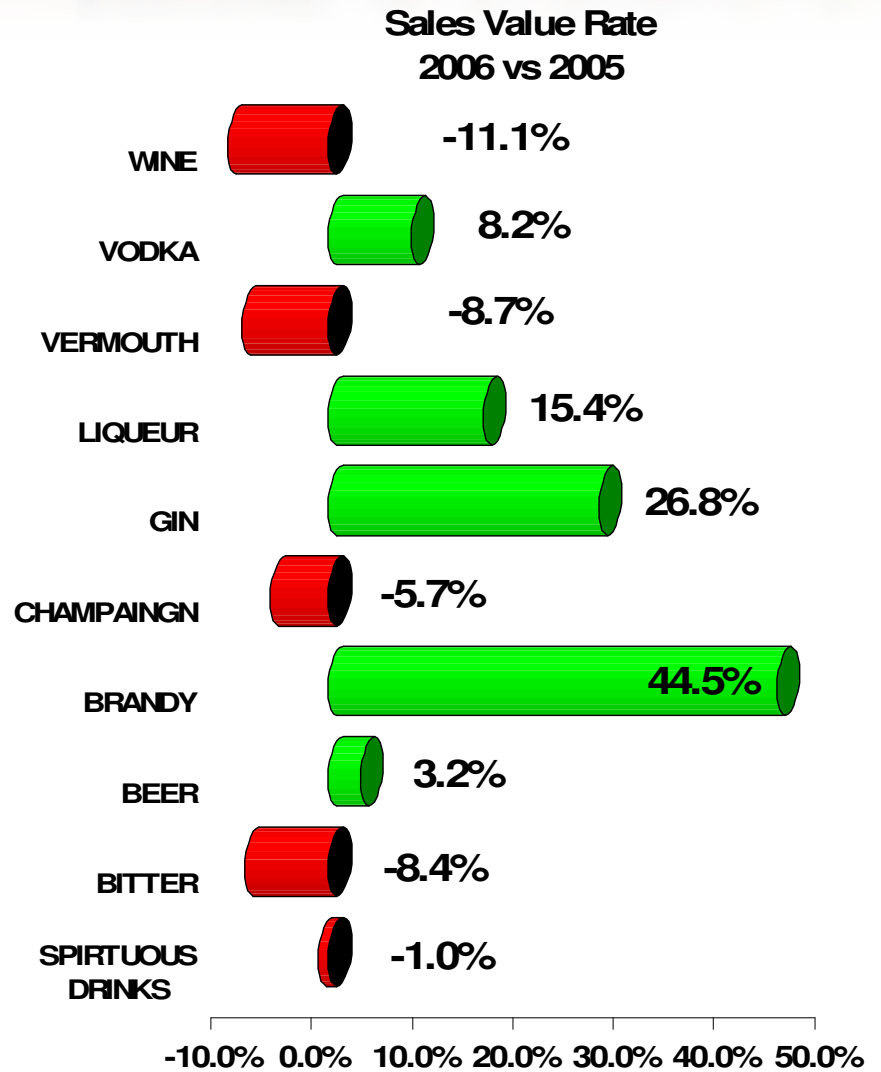
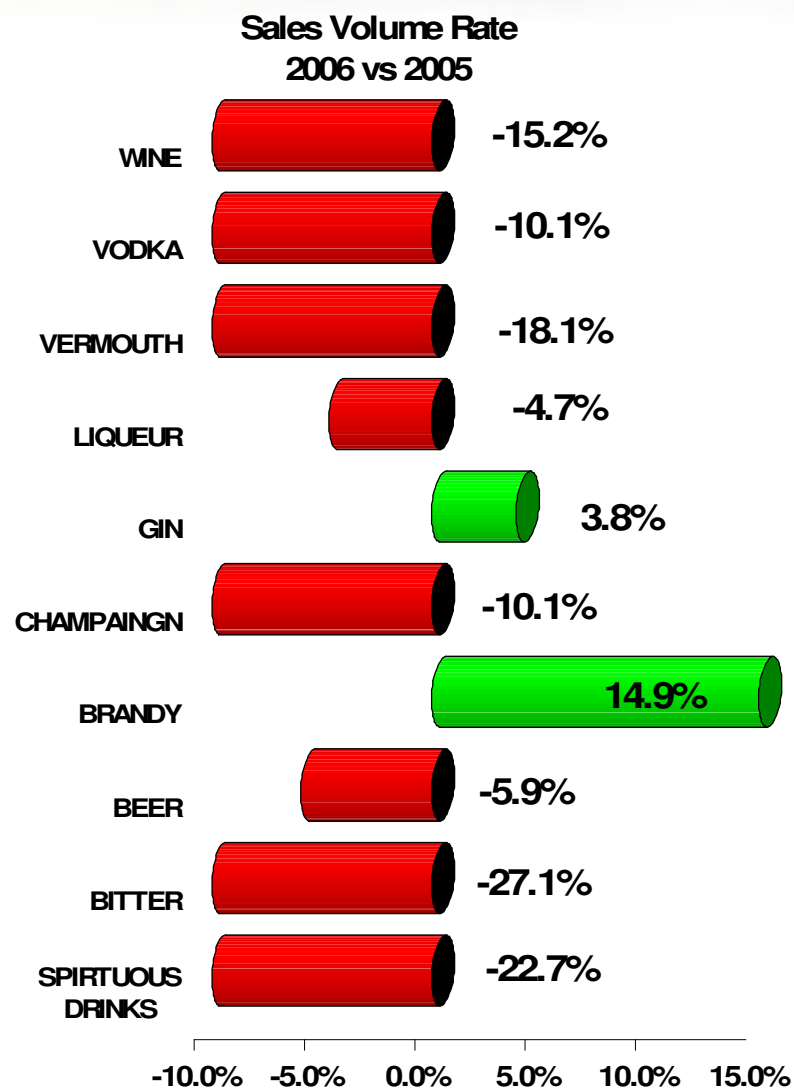
- SPIRTUOUS DRINKS
- BEER
- CHAMPAINGN
- LIQUEUR
- VODKA

- BITTER
- BRANDY
- GIN
- VERMOUTH
- WINE

- SPIRTUOUS DRINKS
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- BITTER
- BRANDY
- GIN
- VERMOUTH
- WINE

Alcoholic Drinks - categories development





NON-ALCOHOLIC DRINKS EVOLUTION

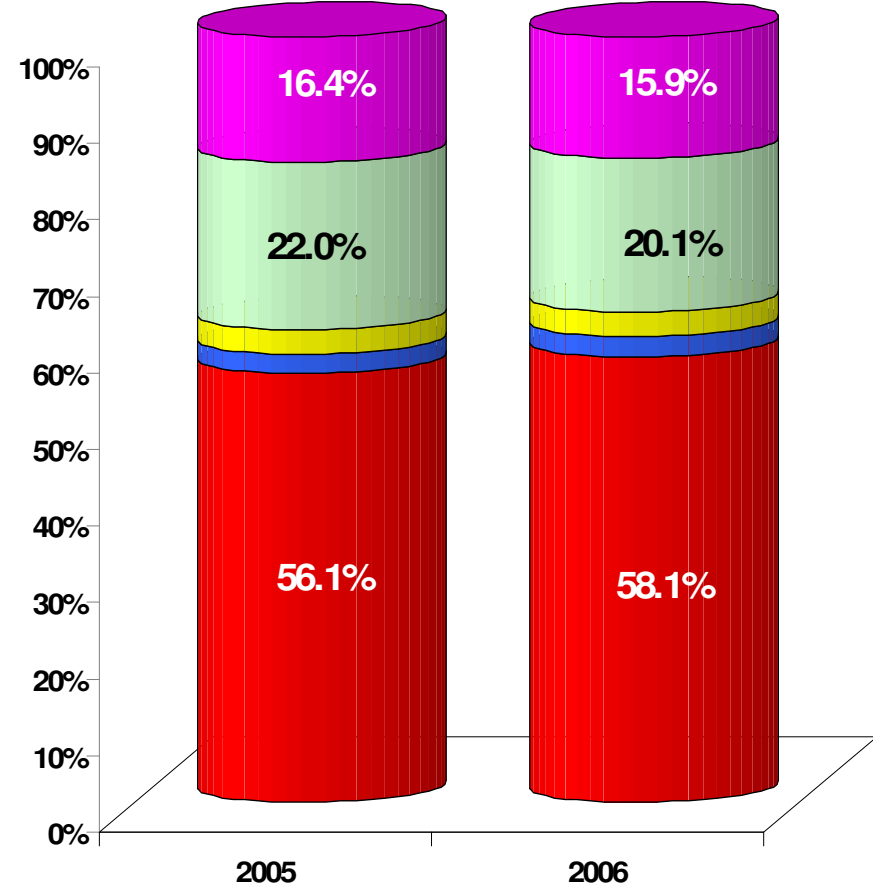
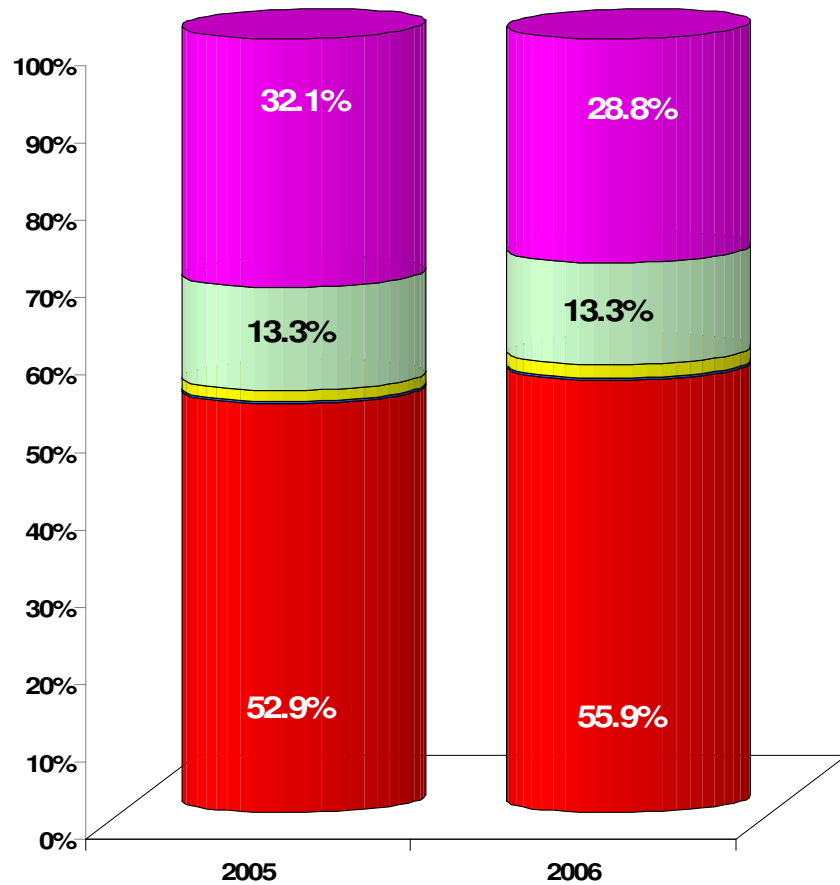
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Non-Alcoholic Drinks - categories importance

Sales Volume

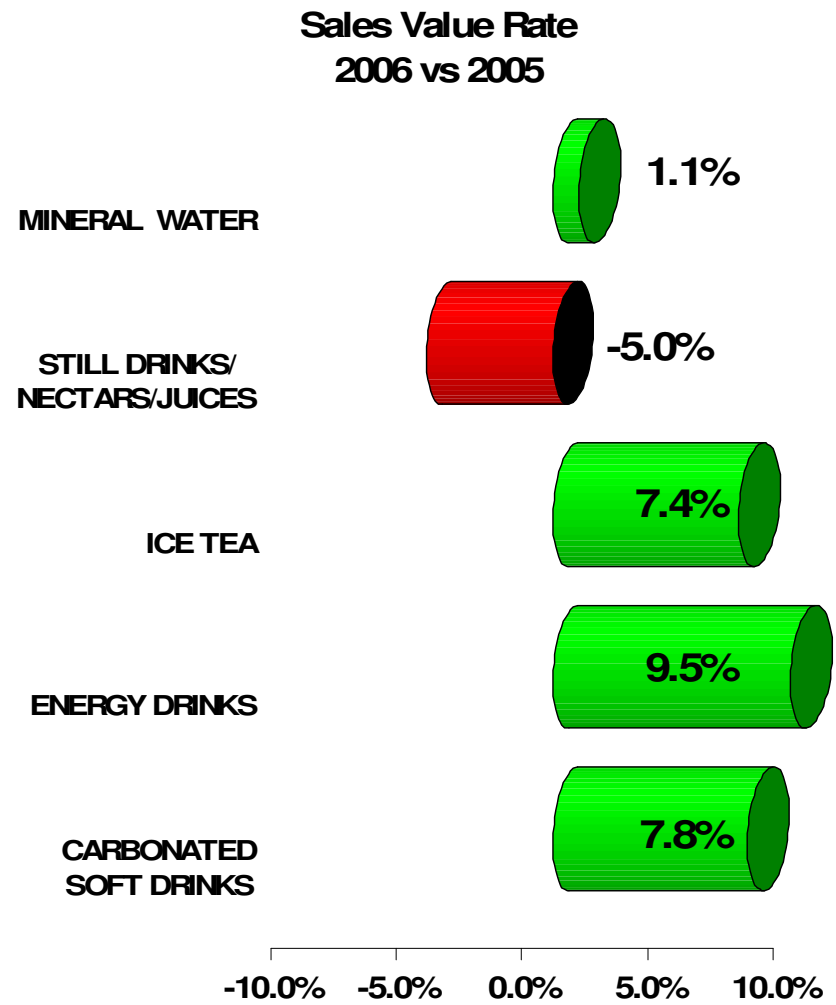
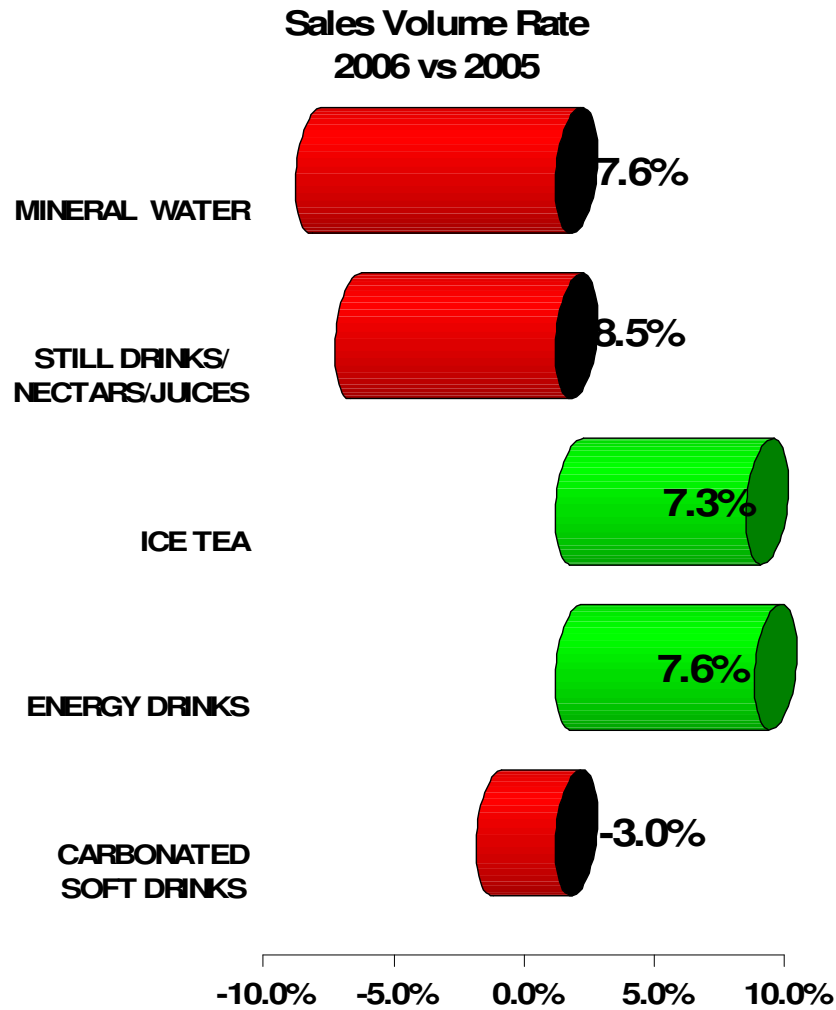
Sales Value



- MINERAL WATER
- STILL DRINKS/NECTARS/JUICES
- ICE TEA
- ENERGY DRINKS
- CARBONATED SOFT DRINKS

- MINERAL WATER
- STILL DRINKS/NECTARS/JUICES
- ICE TEA
- ENERGY DRINKS
- CARBONATED SOFT DRINKS

Non-Alcoholic Drinks - categories development



SUMMARY

- ▶ **Although HORECA market has decreased by -6.5% as number of locations in 2006 compared to 2005, the total beverages market value has increased by 5,6%. In the same time the market decreased in volume (HL) by -7,1%.**
- ▶ **Alcoholic beverages have driven the market increase (+6% in value). Among them, Brandy is the category to increase the most in value sales (44.5%), followed by Gin (+26.8%) and Liqueur (+15.4%).**
- ▶ **Non-Alcoholic beverages have increased by +4% in value; almost all categories have grown in value, except for Still Drinks/ Nectars/ Juices.**



Thank you for your attention!



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