



Asian Market





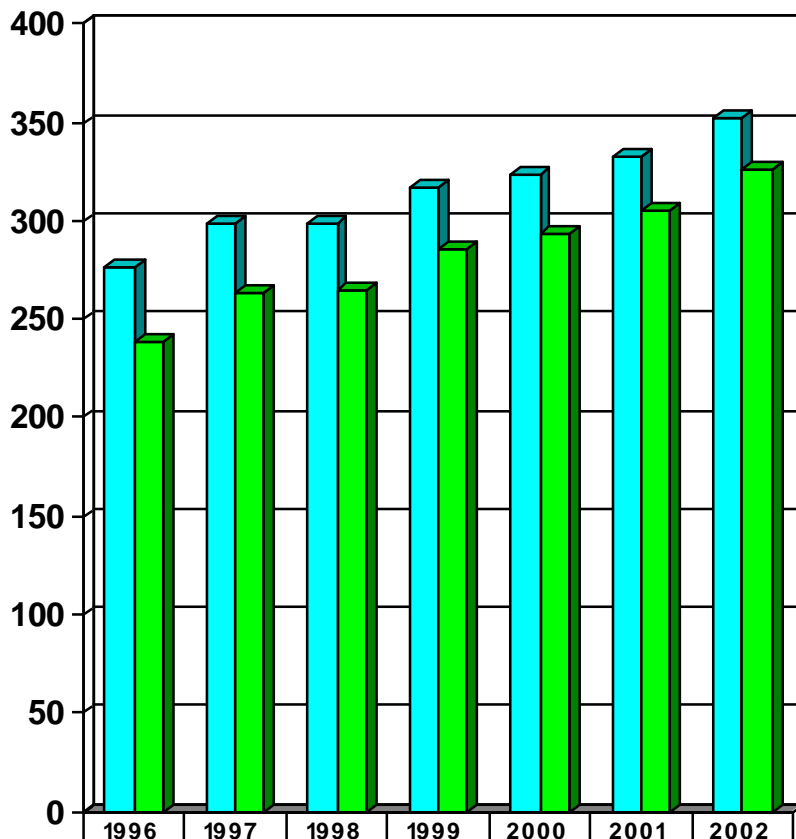
Beverage





Asia Pacific Beer Market: Liquid Volume

million hectoliters



- ☺ Growth Rate
 - 1996-1998 Total 3.9% per year
 - 1996-1998 Packaged 5.2% per year
 - 1998-2002 Total 4.1% per year
 - 1998-2002 Packaged 5.4% per year

☺ Packaged beer will continue to increase its share of the total volume, growing from 90% in 1999 to 93% in 2002

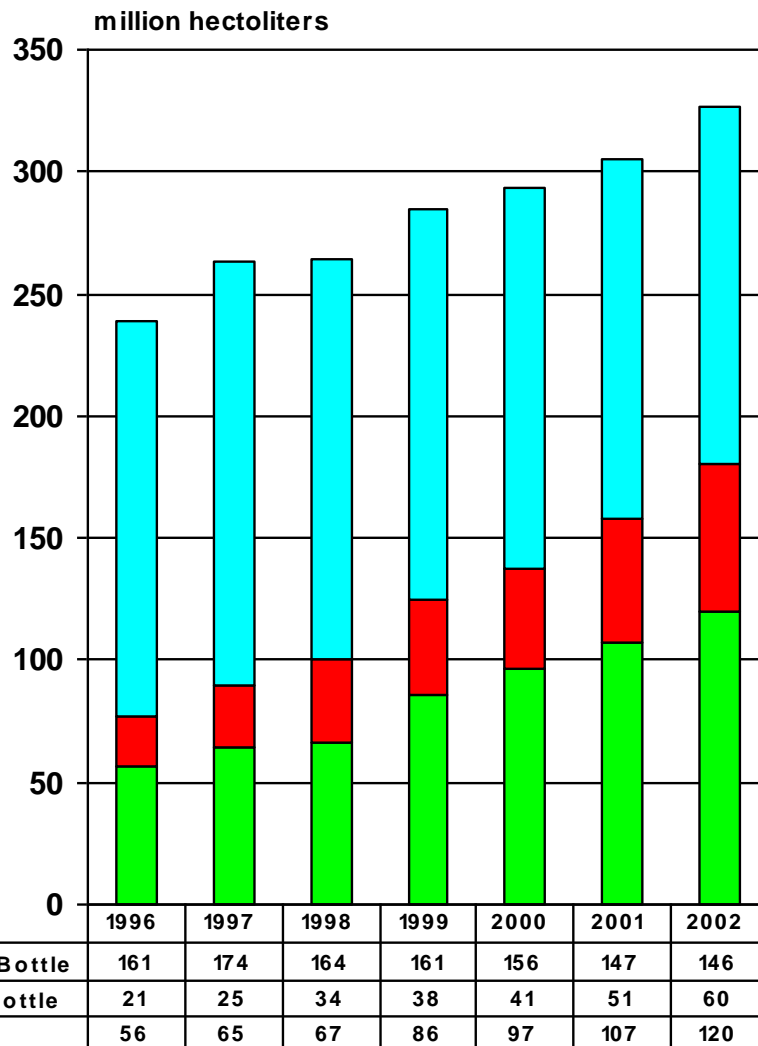
Source: Global Total Beer HL





Asia Pacific

Beer Market: Primary Container Trends



☺ Cans and NR Glass Bottles are each projected to increase their share of the packaged beer liquid volume. Cans will move from 30% in 1999 to 37% in 2002. NR Glass Bottles will grow from 13% in 1999 to 19% in 2002.

☺ Returnable Glass Bottles is the “largest” beer primary container (56% in 1999) , but is losing share (to 45% by 2002) to both Cans and NR Glass Bottles

Source: Global Total Beer HL

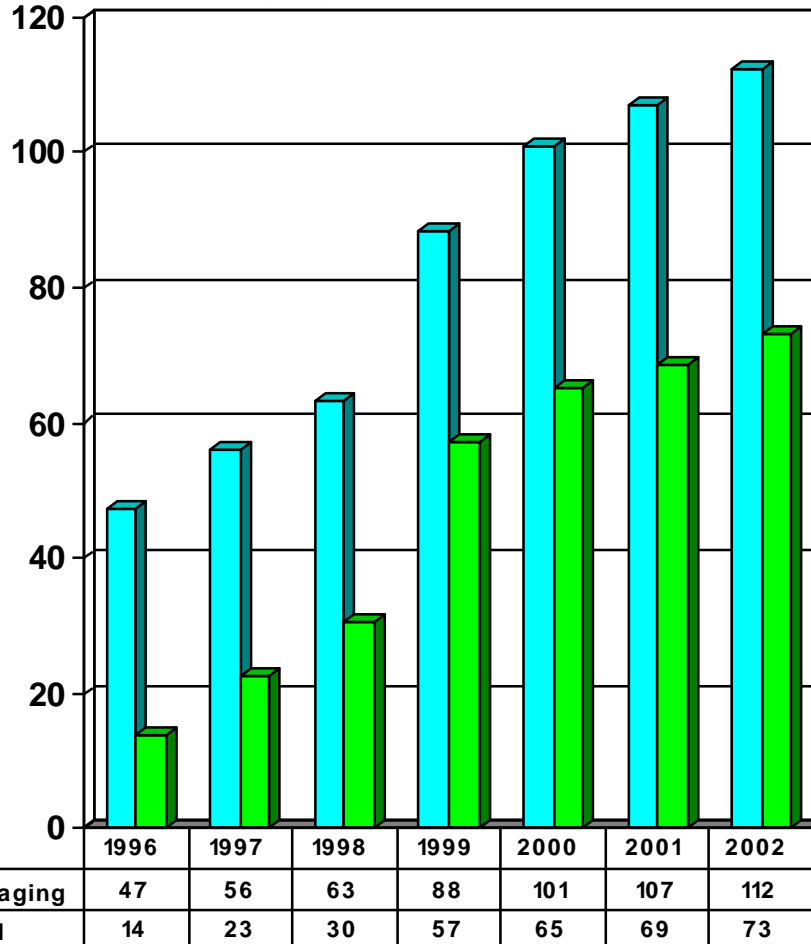




Asia Pacific

Beer Multiple Packaging

Gross Short Tons (000's)



😊 Paperboard is projected to maintain its share (65%) of the Asia Pacific beer secondary packaging market from 1999 to 2002

😊 Shrink film is the second largest beer secondary packaging substrate, but it has lost its dominant share position, falling from 55% in 1996 to 25% in 1999. This trend is expected to continue with share falling to 19% in 2002.

Source: Global Total

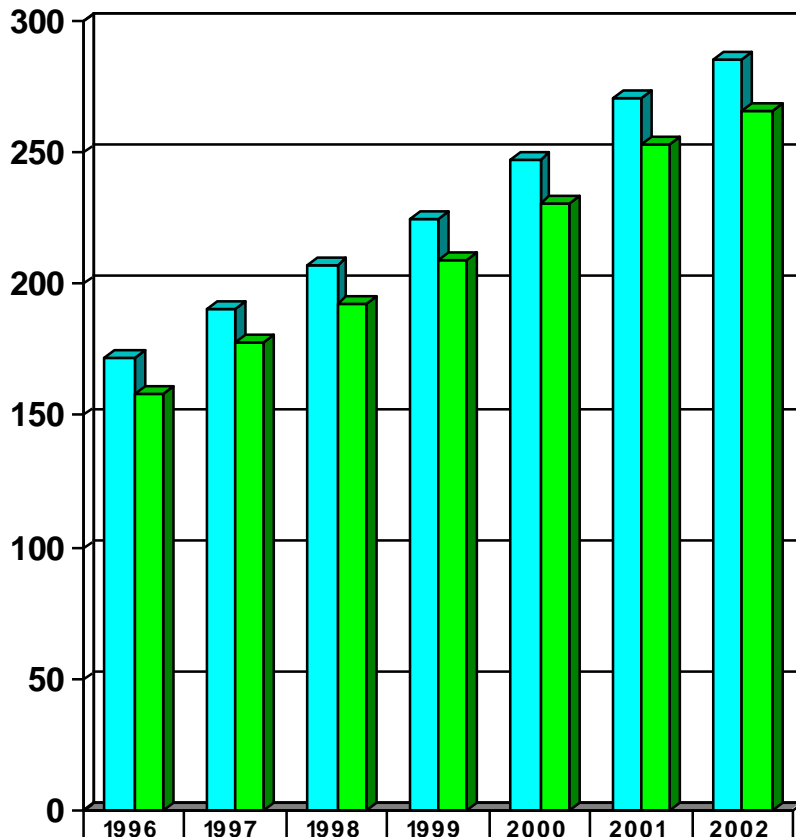




Asia Pacific

Soft Drink Market: Liquid Volume

million hectoliters



Total Volume	172	191	207	225	248	271	285
Packaged Volume	159	177	192	209	230	253	266

- ☺ Growth Rate
 - 1996-1998 Total 9.8% per year
 - Packaged 10.1% per year
 - 1998-2002 Total 8.4% per year
 - Packaged 8.5% per year

☺ Packaged soft drink represents approximately 93% of total soft drink liquid volume

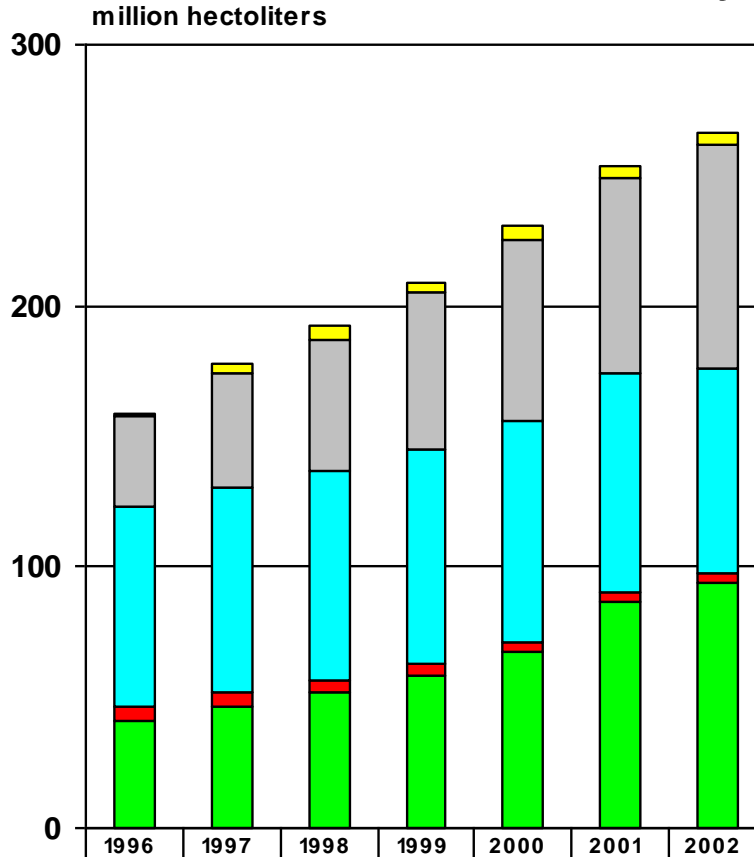
Source: Global Total Soft Drink HL





Asia Pacific

Soft Drink Market: Primary Container Trends



- ☺ By 2002, both Cans and NR PET Bottles are projected to have overtaken Returnable Glass Bottles, the former market leader
- ☺ Cans are projected to grow in share from 28% in 1999 to 35% in 2002.
- ☺ NR PET Bottles will grow from 29% in 1999 to 32% in 2002.
- ☺ Returnable Glass Bottles are projected to fall from 39% in 1999 to 29% in 2002

Ret. PET Bottle	1	3	5	4	5	4	5
NR PET Bottle	34	44	51	60	69	75	86
Ret. Glass Bottle	77	78	80	82	85	84	78
NR Glass Bottle	5	5	5	5	4	4	4
Cans	41	47	52	59	67	86	94

Source: Global Total Soft Drink HL

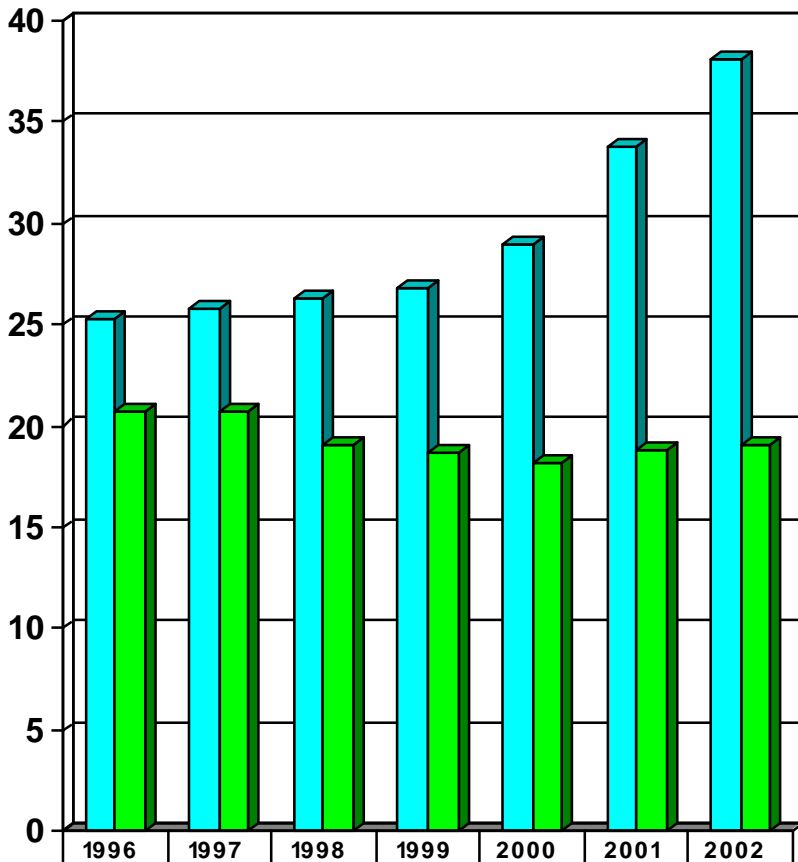




Asia Pacific

Soft Drink Multiple Packaging

Gross Short Tons (000's)



Total Packaging	25	26	26	27	29	34	38
Paperboard	21	21	19	19	18	19	19

- ☺ Soft Drink paperboard tonnage is projected to be flat
- ☺ Paperboard is projected to lose share, falling from 70% of Asia Pacific soft drink secondary packaging to 50% in 2002.
- ☺ Crrugated is projected to increase its share of the secondary packaging market from 26% in 1999 to 38% in 2002
- ☺ Shrink film is projected to increase its share of the secondary packaging market from 4% in 1999 to 11% in 2002

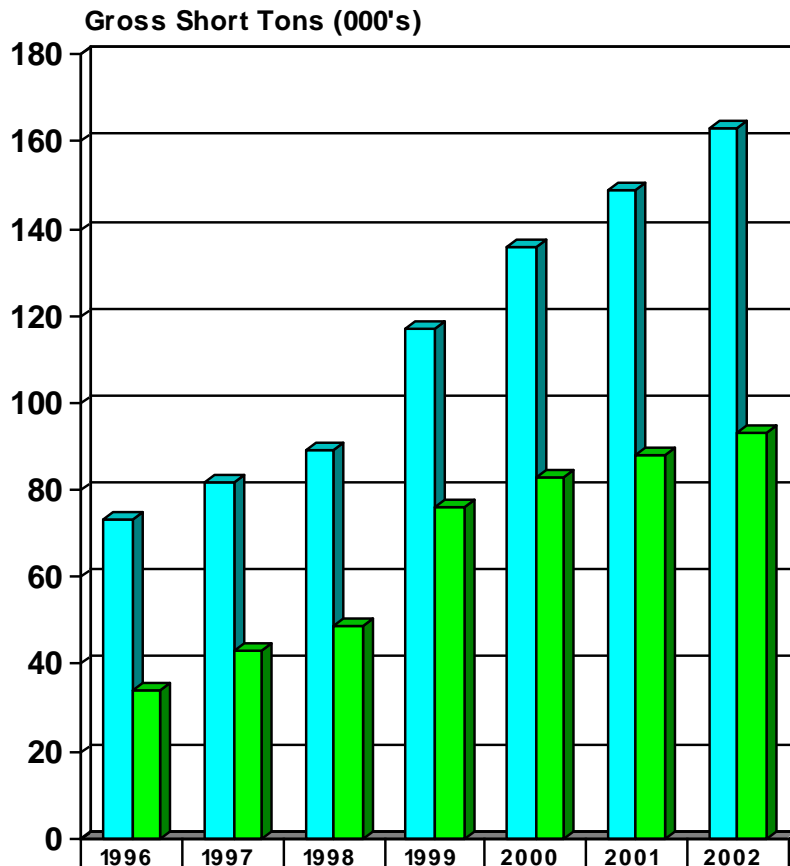
Source: Global Total





Asia Pacific Beverage Packaging Market

Paperboard Trends



■ Total Packaging	73	82	89	117	136	149	163
■ Paperboard	34	43	49	76	83	88	93

☺ Paperboard is projected to lose share in Asia Pacific, falling from 65% in 1999 to 57% in 2002. Paperboard will maintain its share (65%) of beer market packaging, but is projected to fall from 70% of the soft drink packaging market in 1999 to 50% in 2002.

☺ Corrugated will increase its share of soft drink multiple packaging from 26% to 38%, while shrink film is projected to increase its share of soft drink multiple packaging from 4% to 11%.

Source: Paperboard Tons- Total

