BUSS 671 Global Marketing Management

Yang Hé Táng Chinese Herbal Drinks

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INTRODUCTION

This project outlines the marketing plan for '**Yang Hé Táng Chinese Herbal Drinks**' (the "company") which produces bottled Chinese herbal drinks. The product line is currently sold only in Hong Kong while production is undertaken by the manufacturing plant in mainland China. It is positioned as a healthy alternative to soft drinks because it is made of natural Chinese herbs with no artificial flavour or additives. Experiencing rapid sales growth in Hong Kong, the company plans to expand its sales network regionally to other Asian countries. The marketing plan will follow an agenda as follows:

- Project objective
- Country selection
- Market segmentation
- Competitive strategy
- Entry strategy
- Marketing mix
- Conclusion

PROJECT OBJECTIVE

Chinese herbs are known to have the 'medication' effect of reducing 'internal bodily hotness' which causes pimples, gum pains, restlessness, etc. The brand of 'Yang Hé Táng Chinese Herbal Drinks' is established in Hong Kong. The company commenced its business as a small-scale shop specializing in Chinese herbal drinks. The well-renovated environment and high level of hygienic standard have helped the shop build up an image of using modern, scientific management in the delivery of a traditional, health product. As the company established its reputation, it leveraged off its competitive advantage and started setting up branches as well as franchised stores. The brand has thus substantiated its market leader position of selling original, genuine Chinese herbal drinks. In early 2002, the company extended the product line to bottled drinks for distribution in major supermarkets. The rapid sales growth prompted the expansion plan to a regional basis to increase sales and diversify revenue source. As an initial step, the project aims to select 3 to 4 high potential countries within the region. The objective of the project is to market the brand in Asia, accumulate a substantial, stable customer base within six months, attain breakeven within one year, and evaluate expansion possibilities into other countries in the region or to other region(s) in the long term.

COUNTRY SELECTION

The first step of global marketing is identifying target countries where the company's product will be marketed. 3 to 4 high potential countries are to be selected for this first phase of the overseas expansion. The country selection process will include selection criteria that span the spectrum from macro to micro concerns. The factors to be considered include:

- Political and legal environment
- Economic factors
- Existing or potential barrier to entry
- Cultural factors
- State of existing beverage industry
- Historical and projected demand

Political and legal environment

Very often, the greatest constraint of entering into a target country rests with the political and legal environment of the host country. Political stability is of particular concern in the Asian region. The recent terrorist activities in Bali of Indonesia or Mindanao of the Philippines alerted prospective investors targeting the region of the need to take extra precautions before entering a market. Even for more stable countries like Singapore and Japan, the economic downturn since late 1996 have caused their governments to be more receptive to foreign investments that help boost local economic conditions, yet less receptive to imports (of consumer products in particular) which will aggravate their balance of payment problem. Lastly, the development and integrity of a legal system in the host country has to be considered also to ensure a smooth and effectual implementation of any contractual arrangement of the marketing activities.

Economic factors

No factor will be more indispensable than the economic condition of the host country. A common first and foremost indicator will be the gross national income per capita. As the product in question is a consumer product (household drink), annual household income may be a more direct proxy for the purchasing power of the target country. As the product will be positioned as a healthy alternative to soft drinks, the population size between age 15 and 64 will better reflect the potential customer base.

Existing or potential barrier to entry

A high potential country can be barred from entry through local restrictions such as exceedingly high import tariffs, inadequate delivery infrastructure, and as often in the case of Japan, denied or restricted access to wholesalers and retailers.

Cultural factors

The culture of the host country can have direct impact on the market demand of the product in question. For example, a country can be very resistant or very receptive to a foreign drink. As far as Chinese herbal drink is concerned, cultural proximity will likely facilitate a switch from soft drinks to a drink made of Chinese herbs. Related to this is the health awareness of the society at large, which can be reflected from the country's annual health expenditure.

State of beverage industry within the country

The market potential of a country will be affected by the number of existing and potential competitors. Assessment of the level of competition within the beverage industry must not be overlooked.

Historical and projected demand

Sales potential of Chinese herbal drinks, positioned as an alternative to soft drinks, can be estimated from the historical and projected soft drinks consumption and their trend. However, it should be noted that a low current demand level may represent a potential source of untapped market potential too.

Scoring table

Given the above analysis that encompasses both the macro and micro variables affecting the sales potential in a country, relevant statistical data is collected and tabulated at **Appendix 1 and 2**. An index approach is then adopted to help rank the order of preference among the 9 Asian countries, as depicted in **Table 1** below. A rank score from 1 to 9 is given to the countries with respect to each of the 8 dimensions. All dimensions are given equal weighting as we believe that they are all relevant in the potential market evaluation process. The total score of a country represents the simple summation of rank scores across the 8 dimensions.

Table 1: Scoring of the 9 candidate countries in Asia

Country	Political / Legal	GNP / cap	Populat	Entry Barrier	Local Compete	Demand	Culture Proximity	Hlth Exp	Total
China	3	3	9	5	3	9	9	5	46
India	2	1	8	1	9	6	1	6	34
Indonesia	1	2	7	3	8	3	2	1	27
Japan	8	9	6	7	1	8	7	9	55
S Korea	7	7	3	8	2	7	6	7	47
Malaysia	5	6	2	4	7	2	5	2	33
Philippines	4	4	5	2	6	5	3	4	33
Singapore	9	8	1	9	4	1	8	3	43
Thailand	6	5	4	6	5	4	4	8	42

Selected countries

Based on the score table above, the countries selected for the first phase of the regional expansion are, in order of preference, Japan, South Korea and mainland China. To further focus marketing efforts at the initial stage, distribution will first be made in the more highly populated cities of the target countries as follows (estimated population in million):

- Japan (127 mn): Tokyo (8.1 mn), Yokohama (3.4 mn), Osaka (2.6 mn)
- South Korea (48 mn): Seoul (10.2 mn)
- Mainland China (1,228 mn): Shanghai (13 mn), Beijing (12 mn), Tianjin (9 mn), Qingdao (7 mn), Guangzhou (6.7 mn), Hangzhou (6.1 mn), Jinan (5.5 mn), Ningbo (5.3 mn), Nanjing (5.3 mn)

Expected market demand

While the sales potential in the target markets depends on the market penetration mode and effort, a gap analysis is used to estimate our market share and expected sales volume as depicted in **Table 2**. The forecasted consumption of soft drinks in Japan, South Korea and China, in million of litres, are show in the table. The forecasted consumption is based on information provided by Euromonitor 2002. As we are targeting selected cities only in each of the three countries, there is a distribution gap that represents forecasted market demand that we are not reaching due to our limited geographical coverage. Given the group of target customers that we can reach, many will continue to consume soft drinks; this group is represented by the competitive gap. With the target customers that we can reach and decide to consume soft drink alternatives, some will consume other types of drinks that are not part of our product offerings like water, juice or other types of tea; this group is represented by the product line gap. The group of target customers that remain after the deduction of the distribution gap, competitive gap, and product line gap is an estimation of our demand. For 2003, we estimate that the demand for our product is 46 million litres that represents about 0.54% of the total soft drink market in Japan, South Korea and China.

Table 2: Gap analysis showing the estimated market share in target countries

	Japan	South Korea	China	Total
2003 Forecasted Soft Drink Consumption (mn litres) [1]	2,192 (100%)	950 (100%)	5,390 (100%)	8,532 (100%)
Less:				
Distribution Gap	1,315 (60%)	665 (70%)	4,851 (90%)	6,831 (80%)
Competitive Gap	767 (35%)	238 (25%)	270 (5%)	1,275 (15%)
Product Line Gap	99 (4.5%)	38 (4%)	243 (4.5%)	380 (4.5%)
Expected Demand (Market Share)	11 mn litres (0.5%)	9 mn litres (1%)	26 mn litres (0.5%)	46 mn litres (0.54%)

1. Based on Euromonitor 2002.

MARKET SEGMENTATION

The target markets are segmented across the selected countries based on the following consumer profiles:

- Age group ranging from young kids (8+) to the elderly (60+)
- Frequent consumption of soft drinks or other specialty drinks
- Inclination to a more healthy lifestyle orientation

As the target customer profiles will be similar across the three target countries, many of the marketing aspects (for example, the focus on being a health drink, its packing, etc.) can be standardized. Other marketing elements like distribution channel and pricing must be localized to adapt to local conditions.

COMPETITIVE STRATEGY

The soft drink market is extremely competitive. However, a market niche can be developed for the company's product given a health-conscious mindset of the target customers. The

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product will be positioned as a high quality product with a high benefit to ease-of-use ratio to maintain a captive group of brand loyal consumers. With a corresponding premium pricing strategy, the product's competitive advantage will therefore be built upon the image of quality product with the focused marketing message of health drink for daily consumption or a healthy alternative to soft drinks.

ENTRY STRATEGY

Direct exporting will be adopted as the entry strategy into the three target countries - Japan, South Korea and the mainland China. As an initial stage of overseas expansion, direct investment could be too costly and risky. Local production possibility will only be sought when future demand justifies the investment.

The products will be produced and bottled in the existing plant and then shipped to the targeted cities. They will then be sold in convenience stores, grocery stores, supermarkets, and other retail outlets (also vending machines in Japan). While some large-scale retail outlets in the mainland may be approached directly, wholesalers have to be secured in Japan and South Korea to solicit their networks of retailers. The latter will necessarily mean higher cost but will likely be an essential arrangement given the restrictive distribution channel in the two countries.

Depending on the contractual arrangement with the distribution channel members, the company's involvement in the planning of appropriate local promotional events and advertisements with regard to the launch of the product will be desirable.

THE MARKETING MIX

Product strategy

The product's characteristic of being a Chinese herbal drink with no artificial flavour and additive will be emphasized in all marketing messages. It is to be positioned in the target market as a healthy alternative to soft drinks for daily consumption.

It has been explained earlier that the product's brand is first established in Hong Kong and hence naturally, expressed in Chinese. As Chinese characters are not unfamiliar to the three target countries, it is envisaged that the Chinese brand should be retained to echo the theme of 'Chinese-ness' of the product. Furthermore, the 3 Chinese red characters (? ? ?) will be registered as trademark and logo to further consolidate the brand image. However, to pave way for a full swing global marketing, Chinese romanization based on Putonghua rather than Cantonese will be used for the three Chinese characters, that is, Yang Hé Táng.

A product line consisting of 5 different drinks currently selling in Hong Kong will be sold in the target countries:

- Canton love-pes vine (? ? ?)
- Common self heal fruit-spike (? ? ?)
- Hawthorn fruit with honey (? ?)
- Chrysanthemum with honey (? ? ?)
- American ginseng with honey (? ?)

Although being promoted to have mild medication effect, these Chinese herbal drinks do not possess bitter taste as those of the stronger herbal medicine. They are all basically sweet drink with only slight differentiation in flavour (and medication effect) and hence will likely considered as good substitute to soft drinks. While Chinese herbal drinks are traditionally served hot, these drinks have the double benefit of serving as both cold and hot drinks, reducing the seasonal effect on sales.

The drinks will be packed in plastic bottles of three sizes: 375 ml, 700 ml and the family size of 1.5 litres. The product attributes - brand name, flavor availability, packaging design – will be standardized for cost savings and fast diffusion. Product descriptions, ingredients, and health benefits will be printed on the bottle in Chinese and English, with stick-on labels for information such as ingredients and warnings printed in local language.

Pricing strategy

Congruent to the product's competitive advantage of being a quality product, it will be positioned as a healthy alternative to soft drinks. Accordingly, premium pricing will be adopted whereby the price of the product will be set at slightly, say 5-10%, above the average price of local soft drinks. Further considerations may be given to the higher (or lower) local purchasing power of the target markets for a greater extent of differential pricing across the countries with a view to extracting the maximum consumer surplus. However, caution must also be taken to recognize the fact that soft drinks market is very competitive and there are a number of market and price leaders like Coke and Pepsi. The lack of power to set product price must not be underestimated. Price must not be escalated merely because of the longer distribution channel in overseas sales than in domestic sales.

Soft drinks usually have a high gross margin. Yet more often than not, much has to be spent on advertising and promotions to build up the brand status and market share. Given an ex-factory gross margin of about 45%[*], 10% will to be spent on additional administrative and marketing expenses, about 2-3% on shipment and insurance, 3-5% on tariff, a net margin of 40% remains for sharing between channel members and the company.

[*] based on the annual report of a listed company in Hong Kong, 'Tingyi' which sells iced tea

Related to the pricing issue will be the foreign exchange risks involved. As Japan, South Korea and the mainland China are relatively more stable politically than other countries in the region, sales revenue can be left unhedged in the meantime, although the company must keep track of the situation to sustain the policy.

Communications strategy

All communications strategy will stress the theme of the product being a healthy drink for daily consumption being made of all natural ingredients. Target customers are to be convinced to consume the product in place of soft drinks for the sake of better health.

As the three target countries are close neighbouring countries with very high cultural proximity and the potential customers will be quite homogeneous in terms of their attitude towards Chinese products, advertising campaigns can be standardized to a very large extent. Advertisements can be produced with regional 'second-line' celebrities such as the new, young, healthy TV stars from Japan and Korea. Mass advertising through newspapers, specialized magazines, bill boards in popular areas such as bus and train stations is favoured, although TV advertising may also be considered in the mainland for its relatively lower cost and more dispersed target cities. Localization of advertisement will be done minimally, for example, using local languages for the descriptions on printed advertisements.

Other sales promotion methods such as trial drinks in large-scale department stores will not only help boost sales but also facilitate explanation and illustration of product uses through personal selling. Price discounts can also be offered during initial launch, but recommended only for a limited period to match with the overall premium pricing strategy.

Distribution strategy

As mentioned earlier, at this initial stage of overseas expansion, direct investment in local production facilities might not be warranted. Therefore, the drinks will be produced in the existing production plants in the mainland until future demand justifies local production.
The drinks will be exported to the distributors in the host countries. Physical distribution to supermarkets, grocery stores and convenience stores will be handled through wholesalers' networks. This will enable the company to focus on its core competence of marketing high quality health oriented Chinese herbal drinks and to avoid huge initial investments in capital equipment, time and efforts. Utilizing wholesalers' existing networks is considered to be the most effective and efficient access method.

SUMMARY

The project deals with the multi-faceted considerations required in global marketing. Being an initial step, the expansion has been focused on the major cities of a few high potential Asian countries only, namely Japan, South Korea and the mainland China. Market entry will be made through direct exporting, followed by distribution via local wholesalers' network. Targeted at a wide age range of customers, the company will market the drinks with a health focus, aiming to be an alternative to soft drinks. Premium pricing will be adopted in terms of the perceived quality and pricing. Advertising and promotion are designed in accordance with the product characteristics and competitive strategy formulated.

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Appendix I Country Statistics

(Source: World Development Bank, *World Development Indicators*)

Table 1: Population ages 15-64, total (in million)

Country	1997	1998	1999	2000	2001
China	832.08	842.00	852.05	862.21	872.59
India	584.29	597.63	611.27	625.22	638.70
Indonesia	126.72	129.60	132.55	135.56	138.01
Japan	86.87	86.72	86.57	86.42	86.04
Korea, Rep.	32.76	33.20	33.64	34.08	34.17
Malaysia	13.15	13.55	13.96	14.37	14.70
Philippines	41.23	42.31	43.41	44.54	45.80
Singapore	2.65	2.71	2.78	2.85	2.91
Thailand	40.05	40.49	40.92	41.37	42.14

Table 2: GNI per capital (in current US$)

Country	1997	1998	1999	2000	2001
China	710	740	780	840	890
India	420	420	440	450	460
Indonesia	1,110	660	580	570	680
Japan	39,190	33,720	33,350	35,620	35,990
Korea, Rep.	11,390	8,470	8,480	8,960	9,400
Malaysia	4,600	3,630	3,370	3,370	3,640
Philippines	1,240	1,090	1,050	1,040	1,050
Singapore	27,440	24,580	24,190	24,740	..
Thailand	2,780	2110	2000	2010	1970

Table 3: Household final consumption expenditure, etc. (current US$ billions)

Country	1997	1998	1999	2000	2001
China	406.89	431.03	470.02	507.25	551.38
India	283.79	280.27	293.50	298.78	325.78
Indonesia	133.08	64.70	103.52	103.07	97.39
Japan	2,373.33	2,192.01	2,533.10	..	..
Korea, Rep.	270.22	172.47	227.77	270.89	255.58
Malaysia	45.42	30.05	32.83	38.22	39.65
Philippines	59.60	47.57	51.80	47.25	48.83
Singapore	36.28	31.39	32.18	36.70	..
Thailand	83.35	58.99	68.90	73.20	70.47

Kathy Chung / Thomas Wu
02463211G / 02715615G

Appendix I Country Statistics (cont'd.)

Table 4: Food, beverages and tobacco (% of value added in manufacturing)

Country	1997	1998	1999	2000	2001
China	16.06	16.19	..	..	..
India	12.17	11.46	10.95	..	..
Indonesia	..	..	..	..	..
Japan	10.30	11.12	10.95	..	..
Korea, Rep.	8.66	8.93	8.45	..	..
Malaysia	8.39	8.55	8.68	..	..
Philippines	32.98	..	..	..	..
Singapore	3.50	3.48	3.51	..	..
Thailand	..	..	..	..	..

Table 5: Health expenditure, total (% of GDP)

Country	1997	1998	1999	2000	2001
China	4.55	4.82	5.09	..	..
India	5.41	..	..	..	..
Indonesia	1.7	1.62	..	..	..
Japan	7.22	7.2	..	..	..
Korea, Rep.	5.02	5.14	5.42	..	..
Malaysia	2.3	2.48	..	..	..
Philippines	3.59	3.59	3.64	..	..
Singapore	3.17	3.21	..	..	..
Thailand	5.68	5.97	..	..	..

Table 6: Import duties (% of imports)

Country	1997	1998	1999	2000	2001
China	2.82	2.76	..	..	..
India	21.44	20.51	19.99	20.05	..
Indonesia	2.23	0.72	1.74	..	..
Japan	..	..	..	..	..
Korea, Rep.	4.30	..	..	..	..
Malaysia	3.40	..	..	..	..
Philippines	8.85	6.30	7.56	7.08	..
Singapore	0.24	0.28	0.29	0.28	..
Thailand	6.00	4.37	4.10	3.77	..

Appendix I Country Statistics (cont'd.)

Table 7: Food imports (% of merchandise imports)

Country	1997	1998	1999	2000	2001
China	5.03	4.77	4.03	4.00	..
India	5.62	8.93	7.23	..	..
Indonesia	8.82	10.52	15.70	9.95	..
Japan	14.66	15.85	15.15	12.79	..
Korea, Rep.	5.87	6.36	5.73	4.87	..
Malaysia	5.47	5.72	5.50	4.38	..
Philippines	7.61	8.81	8.27	7.69	..
Singapore	4.33	4.38	4.01	3.24	..
Thailand	4.85	5.62	5.00	4.37	..

Table 8: Real effective exchange rate index (1995 = 100)

Country	1997	1998	1999	2000	2001
China	112.17	112.35	106.95	107.63	110.37
India	..	..	..	..	..
Indonesia	..	..	..	..	..
Japan	80.22	78.95	89.28	95.56	85.31
Korea, Rep.	..	..	..	..	..
Malaysia	103.31	82.09	84.48	86.62	91.28
Philippines	108.77	88.71	96.38	89.85	85.29
Singapore	105.55	101.74	95.30	95.47	96.06
Thailand	..	..	..	..	..

Appendix II Historical and Projected Soft Drink Consumption

Historical soft drink consumption (Source: Euromonitor 2002)

	1997	1998	1999	2000	2001
China					
Total Consumption (mn litres)	3,188.27	3,574.77	3,892.76	4,244.46	4,621.08
Annual Growth		12.12%	8.90%	9.03%	8.87%
Consumption Per Capita (litre)	2.58	2.86	3.08	3.33	3.61
Annual Growth		10.85%	7.69%	8.12%	8.41%
India					
Total Consumption (mn litres)	950.81	1,035.65	1,090.75	1,137.60	1,180.30
Annual Growth		8.92%	5.32%	4.30%	3.75%
Consumption Per Capita (litre)	0.98	1.05	1.09	1.13	1.16
Annual Growth		7.14%	3.81%	3.67%	2.65%
Indonesia					
Total Consumption (mn litres)	489.20	379.53	433.16	569.81	706.76
Annual Growth		-22.42%	14.13%	31.55%	24.03%
Consumption Per Capita (litre)	2.43	1.86	2.09	2.71	3.33
Annual Growth		-23.46%	12.37%	29.67%	22.88%
Japan					
Total Consumption (mn litres)	2,122.80	2,121.10	2,146.20	2,139.00	2,137.90
Annual Growth		-0.08%	1.18%	-0.34%	-0.05%
Consumption Per Capita (litre)	16.83	16.77	16.94	16.85	16.84
Annual Growth		-0.36%	1.01%	-0.53%	-0.06%
Korea, Rep. Of					
Total Consumption (mn litres)	846.20	823.00	847.00	879.30	901.23
Annual Growth		-2.74%	2.92%	3.81%	2.49%
Consumption Per Capita (litre)	18.40	17.73	18.08	18.59	18.94
Annual Growth		-3.64%	1.97%	2.82%	1.88%
Malaysia					
Total Consumption (mn litres)	211.80	197.60	198.45	189.54	177.82
Annual Growth		-6.70%	0.43%	-4.49%	-6.18%
Consumption Per Capita (litre)	10.09	9.23	9.09	8.50	7.87
Annual Growth		-8.52%	-1.52%	-6.49%	-7.41%
Philippines					
Total Consumption (mn litres)	1,439.55	1,691.09	1,946.95	1,994.73	2,103.63
Annual Growth		17.47%	15.13%	2.45%	5.46%
Consumption Per Capita (litre)	20.12	23.12	26.06	26.14	27.20
Annual Growth		14.91%	12.72%	0.31%	4.06%
Singapore					
Total Consumption (mn litres)	66.02	63.58	61.26	57.61	54.53
Annual Growth		-3.70%	-3.65%	-5.96%	-5.35%
Consumption Per Capita (litre)	21.48	20.29	19.20	17.75	16.57
Annual Growth		-5.54%	-5.37%	-7.55%	-6.65%
Thailand					
Total Consumption (mn litres)	742.93	686.51	718.10	661.27	699.03
Annual Growth		-7.59%	4.60%	-7.91%	5.71%
Consumption Per Capita (litre)	12.44	11.38	11.80	10.76	11.32
Annual Growth		-8.52%	3.69%	-8.81%	5.20%

Forecasted soft drink consumption (Source: Euromonitor 2002)

			2002	2003	2004	2005	2006
China							
Total Consumption (mn litres)			5,006.17	5,389.89	5,795.15	6,209.16	6,619.90
Forecasted Annual Growth			8.33%	7.66%	7.52%	7.14%	6.62%
Consumption Per Capita (litre)			3.87	4.13	4.40	4.69	4.98
Forecasted Annual Growth			7.20%	6.72%	6.54%	6.59%	6.18%
India							
Total Consumption (mn litres)			1,225.11	1,272.68	1,323.73	1,376.50	1,434.23
Forecasted Annual Growth			3.80%	3.88%	4.01%	3.99%	4.19%
Consumption Per Capita (litre)			1.18	1.21	1.23	1.27	1.31
Forecasted Annual Growth			1.72%	2.54%	1.65%	3.25%	3.15%
Indonesia							
Total Consumption (mn litres)			830.58	955.81	1,095.32	1,264.33	1,467.86
Forecasted Annual Growth			17.52%	15.08%	14.60%	15.43%	16.10%
Consumption Per Capita (litre)			3.84	4.35	4.90	5.60	6.45
Forecasted Annual Growth			15.32%	13.28%	12.64%	14.29%	15.18%
Japan							
Total Consumption (mn litres)			2,174.35	2,192.28	2,202.51	2,210.33	2,215.54
Forecasted Annual Growth			1.70%	0.82%	0.47%	0.36%	0.24%
Consumption Per Capita (litre)			17.11	17.25	17.32	17.38	17.43
Forecasted Annual Growth			1.60%	0.82%	0.41%	0.35%	0.29%
Korea, Rep. Of							
Total Consumption (mn litres)			934.26	949.98	968.10	985.57	1,003.44
Forecasted Annual Growth			3.66%	1.68%	1.91%	1.80%	1.81%
Consumption Per Capita (litre)			19.40	19.49	19.63	19.86	20.10
Forecasted Annual Growth			2.43%	0.46%	0.72%	1.17%	1.21%
Malaysia							
Total Consumption (mn litres)			187.01	195.65	203.39	212.33	221.70
Forecasted Annual Growth			5.17%	4.62%	3.96%	4.40%	4.41%
Consumption Per Capita (litre)			8.07	8.24	8.36	8.63	8.90
Forecasted Annual Growth			2.54%	2.11%	1.46%	3.23%	3.13%
Philippines							
Total Consumption (mn litres)			2,170.88	2,240.51	2,312.67	2,410.38	2,513.72
Forecasted Annual Growth			3.20%	3.21%	3.22%	4.22%	4.29%
Consumption Per Capita (litre)			27.36	27.54	27.74	28.57	29.45
Forecasted Annual Growth			0.59%	0.66%	0.73%	2.99%	3.08%
Singapore							
Total Consumption (mn litres)			51.76	49.15	47.07	45.18	43.36
Forecasted Annual Growth			-5.08%	-5.04%	-4.23%	-4.02%	-4.03%
Consumption Per Capita (litre)			15.49	14.43	13.55	12.82	12.20
Forecasted Annual Growth			-6.52%	-6.84%	-6.10%	-5.39%	-4.84%
Thailand							
Total Consumption (mn litres)			697.05	715.46	715.21	740.86	764.69
Forecasted Annual Growth			-0.28%	2.64%	-0.03%	3.59%	3.22%
Consumption Per Capita (litre)			11.20	11.40	11.30	11.66	12.00
Forecasted Annual Growth			-1.06%	1.79%	-0.88%	3.19%	2.92%