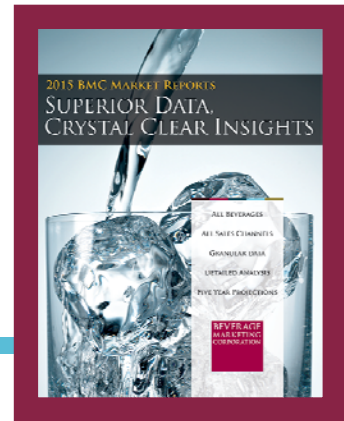


THE GLOBAL BEER MARKET

2015 EDITION (Published January 2016. Data through 2014. Market projections through 2019.) More than 450 pages, with extensive text analysis, graphs, charts and tables.



As beer industry globalization continues apace, this global beer industry research from Beverage Marketing Corporation charts the latest developments, with data on volume by country, continent, brewer and brand. It provides highly detailed profiles of the leading brewers and discusses the impact of the mergers and acquisitions reshaping the industry. It also offers Beverage Marketing's five-year market projections through 2019.

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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

The Global Beer Market report provides market analysis on various aspects of international beer through reliable data and discussions of what the numbers really mean. Questions answered in BMC's global beer industry report include:

- How did the world's diverse regional and national beer markets perform in 2014?
- Which countries lead the world in beer production, overall consumption and per capita consumption? How have country by country global beer market share rankings changed recently?
- What are the top brands by volume?
- As consolidation has reshaped the global brewing industry, which companies have emerged as the leaders and what are their strategies?
- Which regions are expected to grow the fastest to 2019?

THIS REPORT FEATURES

The Global Beer Market delves into the increasingly consolidated international market, providing a comprehensive look at the brewers and their brands, marketing strategies, joint ventures, contract brewing relationships, among other topics, throughout the six major regions of the world. BMC's global beer report offers a wealth of data include volume and per capita consumption by country and region. The report analyzes the drivers likely to propel consumption growth through 2019. Backed by Beverage Marketing's reliable data, users of this detailed global beer market research study get a thorough understanding of all facets of the global beer market including:

- Production volume (in hectoliters), share and growth for more than 150 countries as well as consumption volume, share, growth and per capita intake for numerous selected countries.
- Discussion of the top international brewers - their histories, recent performance, strategies and brands - with production data on 50 companies as well as the world's 20 most popular beer brands. Coverage includes profiles of Anheuser-Busch InBev, Asahi, Carlsberg, Heineken, Kirin, Molson Coors, SABMiller and Tsingtao, among others.
- Analysis of the beer markets in the six major geographical areas (Europe, North America, Asia & Middle East, South America, Africa and Australia & Oceania), including the regions' production and consumption
- Exclusive five-year projections for the international beer marketplace, including production estimates for the entire world as well as its major regions through 2019

The Global Beer Market

January 2016



RESEARCH • DATA • CONSULTING

NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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Countries in every part of the world produce and consume beer. A small number of nations are especially productive, but countries with significant levels of output brew and drink beer all around the globe.

- Five of the six major geographical regions of the world had countries ranking among the 20 most productive nations in 2014. Africa, Asia/Middle East, Europe, North America and South America each had one or more prominent brewing nations.
- Australia/Oceania long had a player among the top 20, but Australia has fallen off the bottom of the list as intensified output from Asian countries like Thailand and Viet Nam, Eastern European markets such as Poland and Ukraine, and African and South American nations altered the global brewing landscape. In 2014, Australia was the 25th largest brewing nation, behind 24th-place Belgium-Luxembourg. Viet Nam, Nigeria and Thailand ranked among the top 20 in 2014.
- The countries that make sizeable quantities of beer generally consume proportionally large amounts as well. For example, with the exception of one country, the 10 largest beer-producing countries also ranked as the 10 biggest consuming countries. (Top-10 producer Viet Nam still ranked as the 11th biggest consumer.)

Beer's apparently universal appeal obscures some definite regional differences. While brewers make and market beer on every continent, history, culture and economic development contribute decisively to the popularity of beer and the magnitude of national and regional beer markets.

- For many years, the most economically advanced industrialized countries dominated the international beer industry. Europe long accounted for almost one-third of global beer production and out produced all other regions.
- The increasingly dynamic Asian/Middle Eastern market, which previously surpassed North America in beer production, displaced Europe as the leading beer-brewing region in 2009 with nothing to suggest that it won't continue to enlarge its share of global beer volume for the indefinite future.
- Those countries with long traditions of beer production and consumption – which tend to be clustered in Europe – consume beer at a much higher rate than the rest of the world. That has not changed even with Asia's ascendance in output. For example, nine of the 10 countries with the highest per capita beer consumption in 2014 were located in Europe.
- Moreover, the countries with the highest rate of beer consumption imbibe a far greater amount of beer than the global average. Residents of the country with the highest per capita consumption – the Czech Republic – drank five and a half times as much beer annually as the 2014 international average. Although China stands first in both beer production and overall consumption, Czech consumers also drank nearly four times as much beer as did the Chinese, who realized an average intake level higher than the global standard for the first time in 2005.
- Simultaneously, some of the fastest growth in consumption is occurring in developing markets, while the most developed markets are seeing little, if any, growth.

**GLOBAL BEER MARKET
SHARE OF PRODUCTION BY CONTINENT (r)
2009 – 2014**

Continents	2009	2010	2011	2012	2013	2014
Asia/Middle East	31.0%	32.0%	33.0%	34.0%	35.0%	36.0%
Europe	28.0%	27.0%	26.0%	25.0%	24.0%	23.0%
North America	18.0%	17.0%	16.0%	15.0%	14.0%	13.0%
South America	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
Africa	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%
Australia/Oceania	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

(r) Revised

Source: Beverage Marketing Corporation; Productschap voor Gedistilleerde Dranken/ Commodity Board for the Distilled Spirits Industry (Netherlands); Joh. Barth & Sohn GmbH & Co.; S.S. Steiner



Source: Beverage Marketing Corporation