

The Barth Report and Germain Hansmaennel present

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## Market Leaders 2006 and their Challengers in the Top 40 Countries



**BARTH-HAAS** GROUP

# Explanation

## Explanation

The **ranking of the countries** is based on production volume. The number on the left of the country indicates its world beer production ranking.

The **ranking of the breweries** is based on their domestic production market shares and not on domestic sales volumes.

### FINANCIAL PARTICIPATION

If the group behind the domestic brewery is written in **capital letters** it means it has a participation over 50%.

If it is written in **small characters** it means it has a participation below 50%.

**POPULATION:** Population in million of inhabitants.

**PRODUCTION:** Production of beer in million of hectolitres.

**PCC:** Per Capita Consumption beer in liters.

**MS:** Market Share based on the mentioned breweries domestic sales.

**GNP:** Gross National Product in billion US\$.

Sources: **Barth Report 2006/2007**,  
United Nations and World Bank Statistics.

Status May 2007

<b>INB</b>	<b>INBEV</b>
<b>A-B</b>	<b>ANHEUSER-BUSCH</b>
<b>SAB</b>	<b>SAB-MILLER</b>
<b>HEI</b>	<b>HEINEKEN</b>
<b>CAR</b>	<b>CARLSBERG</b>
<b>MOCO</b>	<b>MOLSON-COORS</b>
<b>S&amp;N</b>	<b>SCOTTISH&amp;NEWCASTLE</b>
<b>KIR</b>	<b>KIRIN</b>

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Hop is a very complex plant. It offers abundant possibilities to be investigated – not only in beer but also in a physiological context. Our Hop Science Newsletter informs about the newest research activities and new findings to provide the readers with all kind of hop related information. If you would like to receive the Hop Science Newsletter once a month free of charge please write to [christina.schoenberger@johbarth.de](mailto:christina.schoenberger@johbarth.de)



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# North and Central America (NAFTA)

## North and Central America (NAFTA)



### 2 USA

**POP** 296,5  
**GNP** 12969  
**PROD** 231,8  
**PCC** 77  
**MS** 78%

- 1) ANHEUSER-BUSCH
- 2) MILLER SAB
- 3) COORS MOCO

### 15 CANADA

**POP** 32,9  
**GNP** 1051,8  
**PROD** 23,6  
**PCC** 69  
**MS** 84%

- 1) MOLSON MOCO
- 2) LABATT INB

### 6 MEXICO

**POP** 105,3  
**GNP** 753,4  
**PROD** 78,2  
**PCC** 56  
**MS** 100%

- 1) MODELO A-B
- 2) CUAUHTEMOC FEMSA



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# South America

## South America



### 5 BRAZIL

**POP** 186,4  
**GNP** 644,1  
**PROD** 93,6\*  
**PCC** 50  
**MS** 95%

- 1) AMBEV INB
- 2) SHINCARIOL
- 3) KAISER FEMSA

### 25 ARGENTINA

**POP** 38,7  
**GNP** 173  
**PROD** 14\*  
**PCC** 38  
**MS** 92%

- 1) QUILMES INB
- 2) CCU ARG. Hei

### 14 VENEZUELA

**POP** 26,5  
**GNP** 127,8  
**PROD** 24\*  
**PCC** 88  
**MS** 84%

- 1) POLAR
- 2) REGIONAL
- 3) CACN INB

### 30 PERU

**POP** 27,9  
**GNP** 73,1  
**PROD** 9,3\*  
**PCC** 24  
**MS** 100%

- 1) BACKUS  
JOHNSTON SAB
- 2) AMBEV PER. INB

### 18 COLUMBIA

**POP** 45,6  
**GNP** 173  
**PROD** 18\*  
**PCC** 38  
**MS** 100%

- 1) BAVARIA SAB

### 38 CHILE

**POP** 16,3  
**GNP** 45,6  
**PROD** 5,5  
**PCC** 32  
**MS** 99%

- 1) CCU Hei
- 2) CIA CHILE INB

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 Tumbler  
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# Western, Central and Eastern Europe

## Western, Central and Eastern Europe

### 3 GERMANY

**POP** 82,5  
**GNP** 2852,3  
**PROD** 107,2  
**PCC** 116  
**MS** 33%

- 1) RADEBERGER GP
- 2) INBEV GER. INB
- 3) BITBURGER GP

### 4 RUSSIA

**POP** 143,1  
**GNP** 639  
**PROD** 99,9  
**PCC** 67  
**MS** 69%

- 1) BBH CAR S&N
- 2) SUN INTERBREW INB
- 3) HEINEKEN RUS.

### 8 U.K.

**POP** 60,1  
**GNP** 1263,7  
**PROD** 54,1  
**PCC** 96  
**MS** 64%

- 1) SCOTTISH & NEWC.
- 2) CBL MOCO
- 3) INBEV U.K.

### 9 SPAIN

**POP** 43,3  
**GNP** 1100,1  
**PROD** 33,6  
**PCC** 82  
**MS** 83%

- 1) HEINEKEN SP
- 2) MAHOU
- 3) DAMM

### 10 POLAND

**POP** 38,1  
**GNP** 271,4  
**PROD** 32,5  
**PCC** 83  
**MS** 84%

- 1) PIVOWARSKA SAB
- 2) ZYWIEC
- 3) OKOCIM CAR

### 12 UKRAINA

**POP** 47  
**GNP** 71,3  
**PROD** 26,7  
**PCC** 52  
**MS** 80%

- 1) SUN INTERBREW INB
- 2) OBOLON
- 3) BBH CAR S&N

### 13 NETHERLANDS

**POP** 16,3  
**GNP** 598,3  
**PROD** 26,5  
**PCC** 78  
**MS** 75%

- 1) HEINEKEN
- 2) BAVARIA
- 3) GROLSCH

### 17 CZECH REP

**POP** 10,2  
**GNP** 109,2  
**PROD** 19,8  
**PCC** 157  
**MS** 70%

- 1) PLZENSKY PRAZDROJ SAB
- 2) STAROPRAMEN INB
- 3) BUDWEISER

### 19 BELGIUM

**POP** 10,4  
**GNP** 373,7  
**PROD** 18,4  
**PCC** 90  
**MS** 71%

- 1) INBEV
- 2) ALKEN MAES

### 21 ROMANIA

**POP** 21,6  
**GNP** 82,9  
**PROD** 17,5  
**PCC** 81  
**MS** 65%

- 1) BRAU UNION RO HEI
- 2) SAB RO
- 3) INTERBREW RO

### 24 FRANCE

**POP** 60,7  
**GNP** 2177,6  
**PROD** 16  
**PCC** 33  
**MS** 73%

- 1) KRONENBOURG
- 2) HEINEKEN FR.



### 27 ITALY

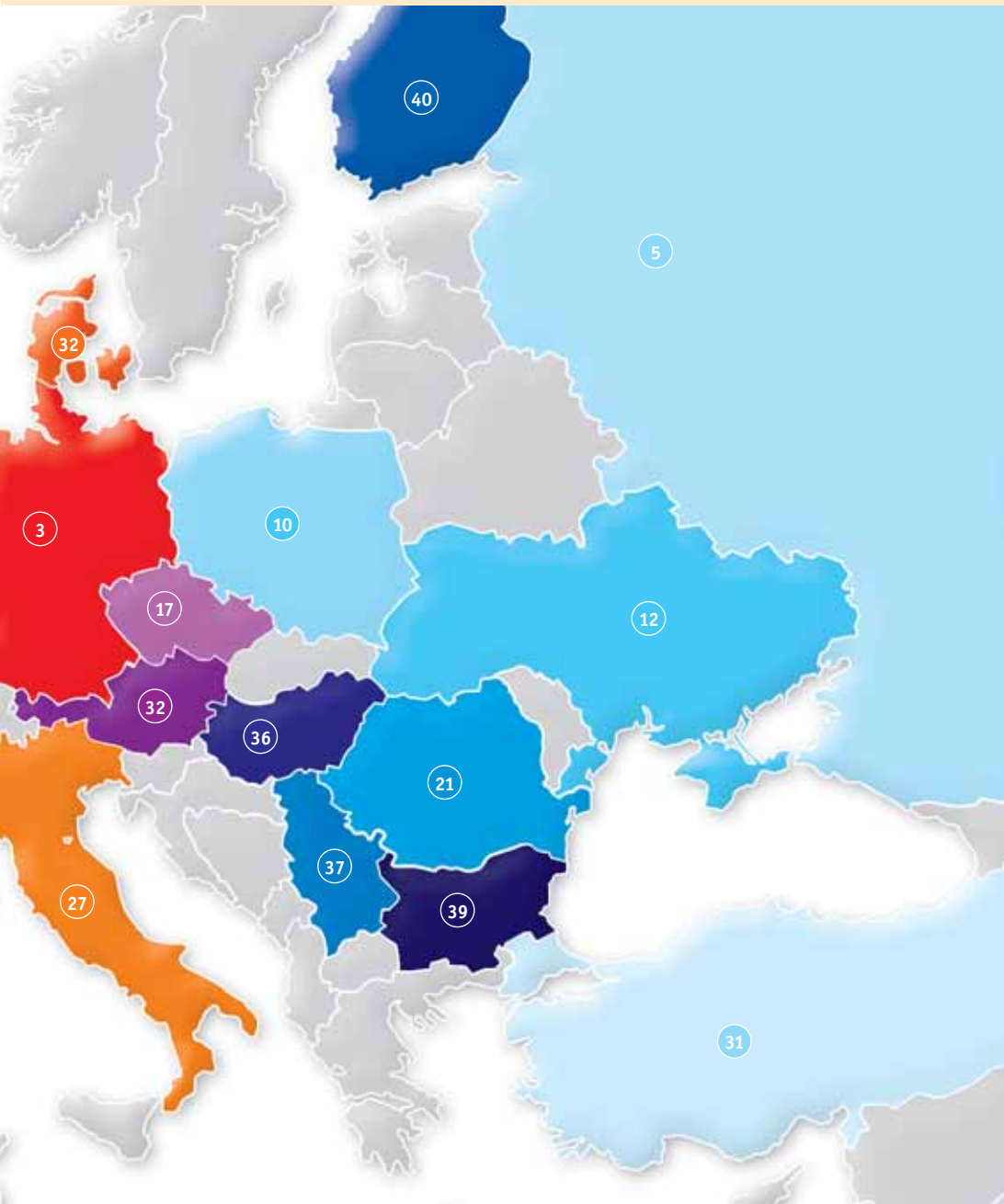
**POP** 58,1  
**GNP** 1724,9  
**PROD** 12,1  
**PCC** 30  
**MS** 61%

- 1) HEINEKEN IT
- 2) PERONI SAB

### 29 IRELAND

**POP** 4,1  
**GNP** 1366,6  
**PROD** 9,4  
**PCC** 130  
**MS** 88%

- 1) GUINNESS DIAGEO
- 2) MURPHY HEI



### 34 DENMARK

**POP** 5,4  
**GNP** 256,8  
**PROD** 8,2  
**PCC** 84  
**MS** 85%

- 1) CARLSBERG
- 2) ROYAL UNIBREW

### 36 HUNGARY

**POP** 10,1  
**GNP** 101,1  
**PROD** 6,9  
**PCC** 75  
**MS** 80%

- 1) BORSODI SORGYAR INB
- 2) BRAU UNION HEI
- 3) DREHER SORGYAR SAB

### 37 SERBIA

**POP** 7,5  
**GNP** 21,7  
**PROD** 5,9  
**PCC** 53  
**MS** 66%

- 1) APATIN INB
- 2) BIP

### 39 BULGARIA

**POP** 7,7  
**GNP** 21,3  
**PROD** 5,2  
**PCC** 69  
**MS** 83%

- 1) ZAGORKA Hei
- 2) KANENITZA INB
- 3) CARLSBERG BUL

### 40 FINLAND

**POP** 5,2  
**GNP** 196,4  
**PROD** 4,5  
**PCC** 87  
**MS** 89%

- 1) SINEBRYCHOFF CAR
- 2) HARTWALL S&N

### 31 TURKEY

**POP** 72,7  
**GNP** 342,2  
**PROD** 9,1  
**PCC** 11  
**MS** 99%

- 1) EFES
- 2) TURK TUBORG CAR

### 32 AUSTRIA

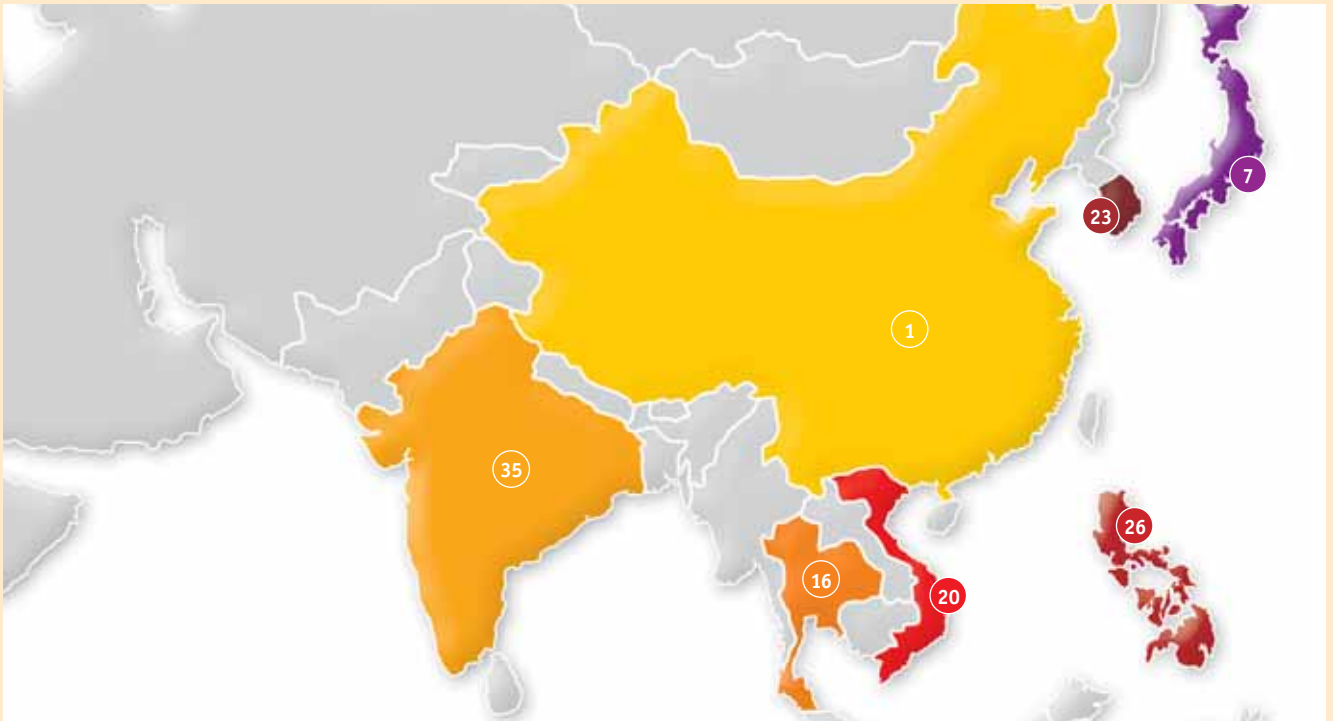
**POP** 8,2  
**GNP** 308,6  
**PROD** 8,8  
**PCC** 108  
**MS** 63%

- 1) BRAU UNION HEI
- 2) STIEGL

### 33 PORTUGAL

**POP** 10,5  
**GNP** 170,7  
**PROD** 8,4  
**PCC** 63  
**MS** 99%

- 1) UNICER CAR
- 2) CENTRALCER S&N



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**1 CHINA**

**POP** 1303,9  
**GNP** 2263,8  
**PROD** 351,5  
**PCC** 25  
**MS** 50%

- 1) CRE SNOW Sab
- 2) TSINGTAO
- 3) YAN JING
- 4) INBEV

**16 THAILAND**

**POP** 64,2  
**GNP** 196,9  
**PROD** 20,2  
**PCC** 28  
**MS** 92%

- 1) BEER THAI (CHANG)
- 2) SINGHA CORP

**23 SOUTH KOREA**

**POP** 43,3  
**GNP** 764,6  
**PROD** 16,4  
**PCC** 34  
**MS** 100%

- 1) HITE
- 2) ORIENTAL BREW. INB

**35 INDIA**

**POP** 1095,6  
**GNP** 793  
**PROD** 8  
**PCC** 1  
**MS** 80%

- 1) UNITED BR. S&N
- 2) SAB IND

**7 JAPAN**

**POP** 127,9  
**GNP** 4985,2  
**PROD** 63  
**PCC** 49  
**MS** 91%

- 1) ASAHI
- 2) KIRIN
- 3) SAPPORO

**20 VIETNAM**

**POP** 83  
**GNP** 51,6  
**PROD** 18  
**PCC** 15  
**MS** n.a.

- 1) SAIGON BR.
- 2) HANOI BR.

**26 PHILIPPINES**

**POP** 83,1  
**GNP** 108,3  
**PROD** 13,2  
**PCC** 16  
**MS** 98%

- 1) SAN MIGUEL Kir
- 2) ASIA BR.

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# Africa/Oceania

## Africa/Oceania

### 11 SOUTH AFRICA

**POP** 45,1  
**GNP** 224,1  
**PROD** 27\*  
**PCC** 57  
**MS** 100%

1) SAB

### 22 AUSTRALIA

**POP** 20,3  
**GNP** 654,6  
**PROD** 17,2  
**PCC** 82  
**MS** 82

1) FOSTERS  
2) LION NATHAN Kir

### 28 NIGERIA

**POP** 131,5  
**GNP** 74,1  
**PROD** 11,5  
**PCC** 9  
**MS** 94%

1) NIGERIAN BR. HEI  
2) GUINNESS NIG

## The Top 40 Beer Producing Countries 2006 (in mio hl)

World Beer Production: 1,699 mio hl – Market Share Top 40 Countries: 93%

<b>1 China</b>	351.515	<b>21 Romania</b>	17.487
<b>2 USA</b>	231.822	<b>22 Australia</b>	17.200
<b>3 Germany</b>	107.174	<b>23 South-Korea</b>	16.436
4 Russia	99.900	<b>24 France</b>	16.030
5 Brazil	93.600*	<b>25 Argentina</b>	14.000*
6 Mexico	78.162	<b>26 Philippines</b>	13.210
7 Japan	62.980	<b>27 Italy</b>	12.055
8 United Kingdom	54.133	<b>28 Nigeria</b>	11.500
9 Spain	33.600	<b>29 Ireland</b>	9.377
10 Poland	32.500	<b>30 Peru</b>	9.300*
11 South Africa	27.000*	<b>31 Turkey</b>	9.140
12 Ukraina	26.730	<b>32 Austria</b>	8.818
13 Netherlands	26.479	<b>33 Portugal</b>	8.359
14 Venezuela	24.000*	<b>34 Denmark</b>	8.175
15 Canada	23.636	<b>35 India</b>	8.000
16 Thailand	20.209	<b>36 Hungary</b>	6.930
17 Czech Republic	19.800	<b>37 Serbia</b>	5.878
18 Columbia	18.400*	<b>38 Chile</b>	5.484
19 Belgium	18.383	<b>39 Bulgaria</b>	5.228
20 Vietnam	18.000	<b>40 Finland</b>	4.548

\*Estimated

# Hop Innovations for Natural Quality



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