

The Barth Report and Germain Hansmaennel present

2008 | Market Leaders and their Challengers in the Top 40 Countries



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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 of beer in litres.

MS: Market share based on the mentioned breweries' domestic sales. The breweries are mentioned in the national ranking either if their market share is superior to 10% with a minimum volume of 1 million hl or if they appear in the top 40 brewery list having more than 5% market share in the respective country.

GNP: Gross National Product in billion US\$.

Sources: Barth-Report 2008/2009, United Nations and World Bank Statistics

■	ABI	AB INBEV
■	SAB	SAB-MILLER
■	HEI	HEINEKEN
■	CAR	CARLSBERG
	MOCO	MOLSON-COORS
	KIR	KIRIN
	ASA	ASAHI

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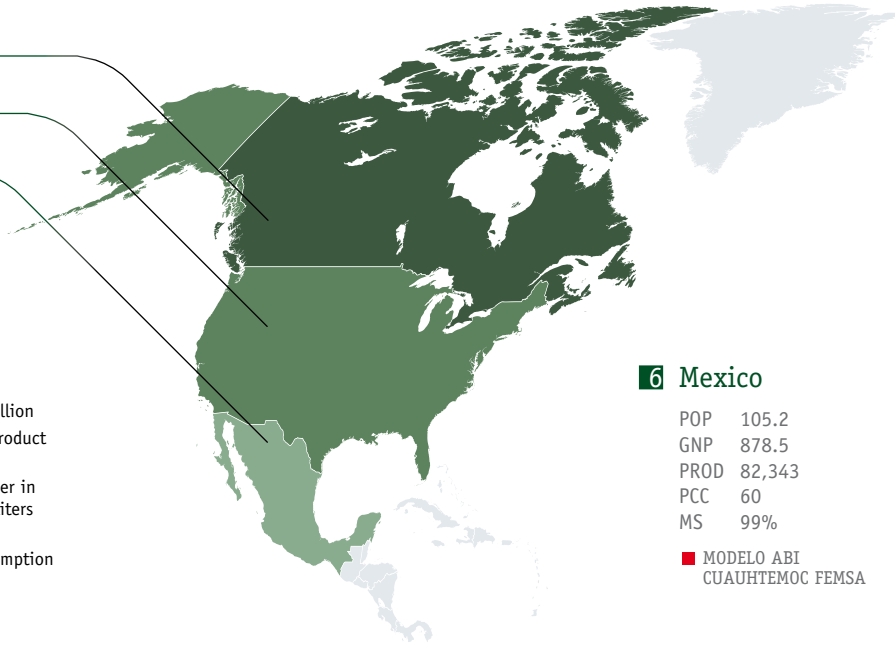
www.symrise.com

North and Central America

Canada **15**

USA **2**

Mexico **6**



2 USA

POP 302.3
GNP 13,847.0
PROD 231,772
PCC 83
MS 79%

■ AB INBEV
■ MILLERCOORS SAB MOCO

Quick Helper

POP: Population in million
GNP: Gross National Product in billion US\$
PROD: Production of beer in million of hectoliters * Estimate
PCC: Per Capita Consumption beer in liters
MS: Market Share

■ ABI AB INBEV
■ SAB SAB-MILLER
■ HEI HEINEKEN
■ CAR CARLSBERG
■ MOCO MOLSON-COORS
■ KIR KIRIN
■ ASA ASAHI

6 Mexico

POP 105.2
GNP 878.5
PROD 82,343
PCC 60
MS 99%

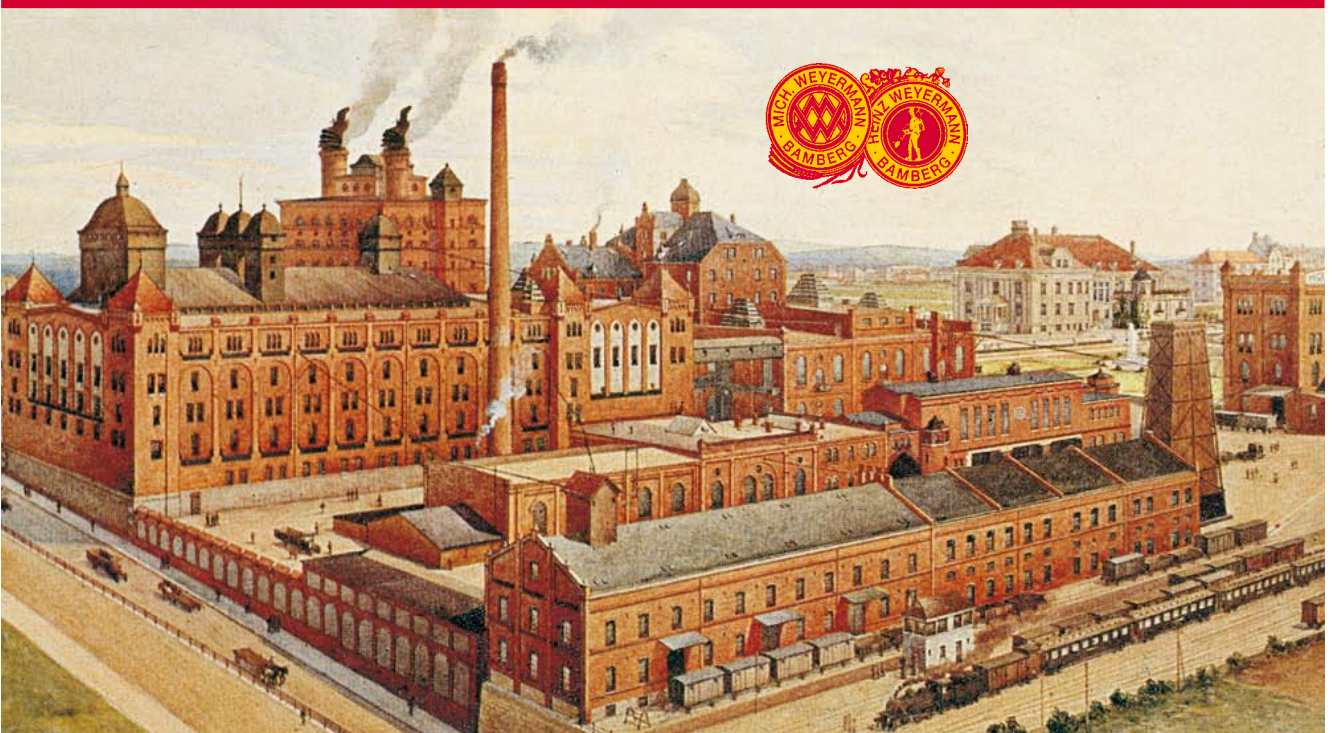
■ MODELO ABI
■ CUAUHEMOC FEMSA

15 Canada

POP 32.6
GNP 1,177.4
PROD 23,662
PCC 70
MS 86%

■ LABATT ABI
■ MOLSON MOCO

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reddot design award
 winner 2005



4 Brazil

POP 191.3
 GNP 1,313.3
 PROD 106,300 *
 PCC 57
 MS 99%

■ AMBEV ABI
 SHINCARIOL
 KAISER FEMSA
 PETROPOLIS

14 Venezuela

POP 27.4
 GNP 231.4
 PROD 24,905
 PCC 101
 MS 80%

POLAR
 REGIONAL

19 Columbia

POP 40.1
 GNP 185.3
 PROD 19,000 *
 PCC 43
 MS 100%

■ BAVARIA SAB

24 Argentina

POP 39.5
 GNP 256.1
 PROD 15,500 *
 PCC 41
 MS 90%

■ QUILMES ABI
 ■ CCU ARG Hei

29 Peru

POP 27.9
 GNP 99.2
 PROD 10,800
 PCC 36
 MS 96%

■ BACKUS&JOHNSTON SAB
 ■ AMBEV PERU ABI

37 Chile

POP 16.5
 GNP 142.0
 PROD 5,870
 PCC 35
 MS 100%

■ CCU Hei
 ■ CIA CHILE ABI

Quick Helper

POP: Population in million
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 ■ SAB SAB-MILLER
 ■ HEI HEINEKEN
 ■ CAR CARLSBERG
 ■ MOCO MOLSON-COORS
 ■ KIR KIRIN
 ■ ASA ASAHI



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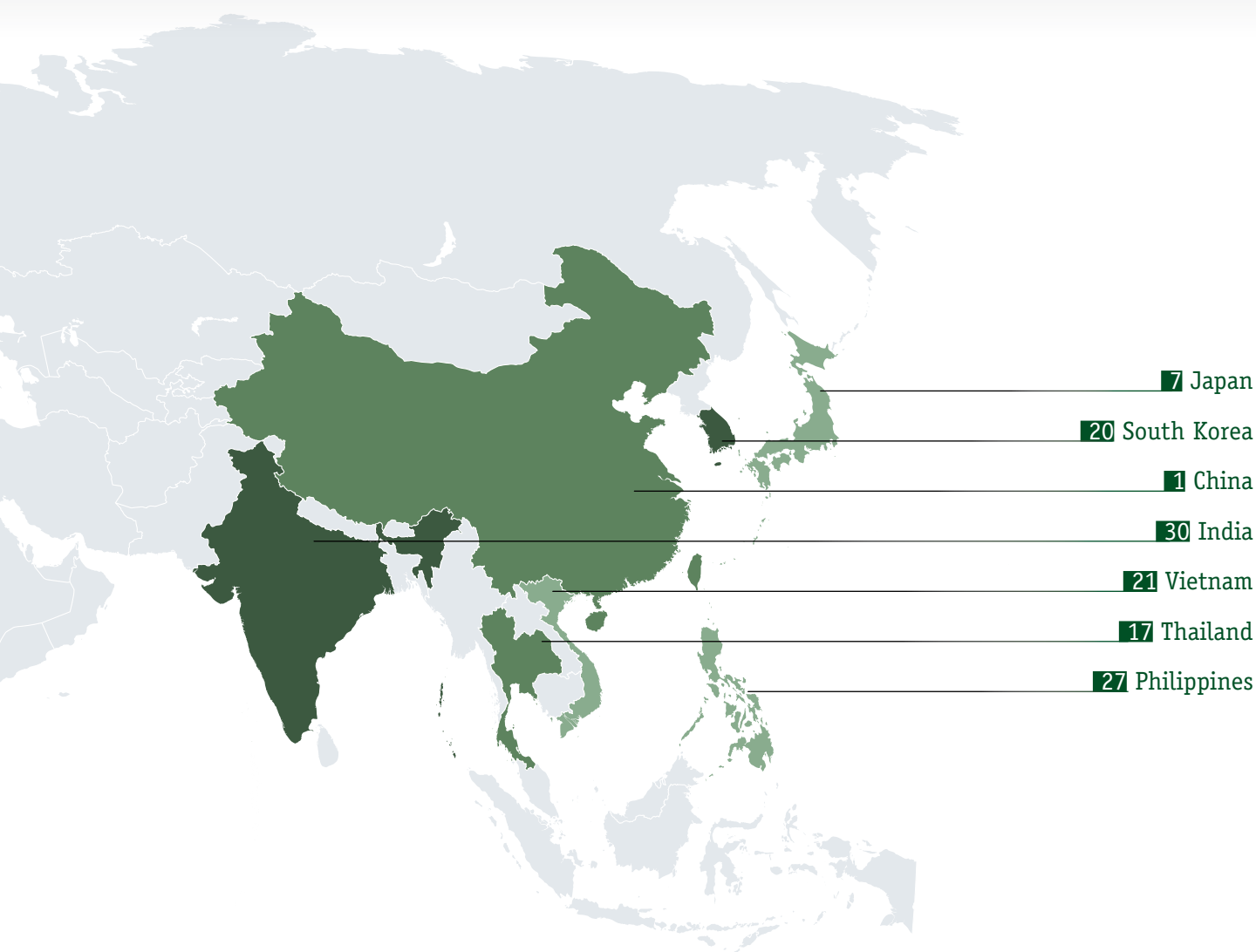
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Helga Reiß, Tel. +49/82 61/9 99-3 32





7 Japan

20 South Korea

1 China

30 India

21 Vietnam

17 Thailand

27 Philippines

1 China

POP 1,339.0
GNP 3,250.8
PROD 410,301
PCC 32
MS 50%

■ CRE SNOW SAB
■ TSINGTAO Asahi
■ YANJING
■ AB INBEV

7 Japan

POP 127.7
GNP 4,497.0
PROD 61,111
PCC 52
MS 99%

KIRIN
ASAHI
SUNTORY
SAPPORO

17 Thailand

POP 63.9
GNP 240.2
PROD 20,725
PCC 31
MS 92%

SINGHA CORP
BEER THAI CHANG

20 South Korea

POP 48.5
GNP 957.0
PROD 18,615
PCC 37
MS 100%

HITE
ORIENTAL BR.

21 Vietnam

POP 85.1
GNP 68.5
PROD 18,499
PCC 19
MS 58%

■ SAIGON BR.
■ HANOI BR. Car
■ APB Hei

27 Philippines

POP 87.9
GNP 156.9
PROD 13,300
PCC 16
MS 93%

SAN MIGUEL Kir

30 India

POP 1,125.7
GNP 1,136.0
PROD 9,950
PCC 1
MS 75%

■ UNITED BR. Hei
■ SAB INDIA

Quick Helper

POP: Population in million
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* Estimate
PCC: Per Capita Consumption beer in liters
MS: Market Share

■ ABI AB INBEV
■ SAB SAB-MILLER
■ HEI HEINEKEN
■ CAR CARLSBERG
■ MOCCO MOLSON-COORS
■ KIR KIRIN
■ ASA ASAHI

Western, Central and Eastern Europe

3 Russia

POP 141.1
GNP 1,250.0
PROD 114,000
PCC 81
MS 83%

■ BBH CAR
■ SUN INBEV ABI
■ HEINEKEN RUS
■ EFES RUS

5 Germany

POP 82.3
GNP 3,322.0
PROD 102,860
PCC 111
MS 38%

■ RADEBERGER GR
■ AB INBEV GER
■ BITBURGER GP
■ OETTINGER

8 U. K.

POP 60.1
GNP 2,772.5
PROD 49,469
PCC 88
MS 77%

■ SCOTTISH & NEW HEI
■ CBL MOCO
■ AB INBEV UK
■ CARLSBERG UK

9 Poland

POP 38.1
GNP 400.0
PROD 35,600
PCC 93
MS 90%

■ PIVOWARSKA SAB
■ ZYWIEC HEI
■ OKOCIM CAR

10 Spain

POP 44.8
GNP 1,438.9
PROD 33,400
PCC 84
MS 84%

■ MAHOU - SAN MIGUEL
■ HEINEKEN SP
■ DAMM

11 Ukraine

POP 46.4
GNP 138.5
PROD 32,030
PCC 62
MS 94%

■ SUN INBEV ABI
■ OBOLON
■ BBH CAR

12 Netherlands

POP 6.3
GNP 768.0
PROD 26,500 *
PCC 77
MS 90%

■ HEINEKEN NL
■ BAVARIA
■ GROLSCH SAB
■ INBEV NL

16 Romania

POP 21.5
GNP 160.1
PROD 20,774
PCC 92
MS 69%

■ SAB RO
■ BRAU UNION RO HEI
■ INBEV RO ABI

18 Czech Rep.

POP 10.3
GNP 165.8
PROD 19,806
PCC 159
MS 79%

■ PLZENSKY PRAZDROJ SAB
■ STAROPRAMEN ABI
■ HEINEKEN CZ

22 Belgium

POP 10.6
GNP 453.6
PROD 17,796
PCC 86
MS 68%

■ INBEV
■ ALKEN-MAES HEI

26 France

POP 61.6
GNP 2,560.2
PROD 14,430
PCC 31
MS 67%

■ KRONENBOURG CAR
■ HEINEKEN FR HEI

28 Italy

POP 59.1
GNP 2,104.6
PROD 13,212
PCC 31
MS 52%

■ HEINEKEN ITA
■ PERONI SAB

31 Turkey

POP 73.8
GNP 504.8
PROD 9,900
PCC 12
MS 99%

■ EFES
■ TURK TUBORG

32 Austria

POP 8.3
GNP 373.9
PROD 8,937
PCC 108
MS 63%

■ BRAU UNION HEI
■ STIEGL

33 Ireland

POP 4.3
GNP 223.7
PROD 8,846
PCC 106
MS 99%

■ GUINNESS DIAGEO
■ MURPHY HEI

34 Portugal

POP 10.6
GNP 214.1
PROD 8,208
PCC 61
MS 98%

■ UNICER CAR
■ CENTRALCER HEI

35 Denmark

POP 5.4
GNP 315.1
PROD 7,870
PCC 81
MS 97%

■ CARLSBERG
■ ROYAL UNIBREW

36 Hungary

POP 10.0
GNP 128.4
PROD 7,049
PCC 79
MS 90%

■ BRAU UNION HEI
■ DREHER SORGYAR SAB
■ BORSODI SORGYAR ABI

37 Serbia

POP 7.4
GNP 39.5
PROD 6,366
PCC 61
MS 87%

■ APATIN ABI
■ CARLSBERG SERB.
■ EFFES

39 Bulgaria

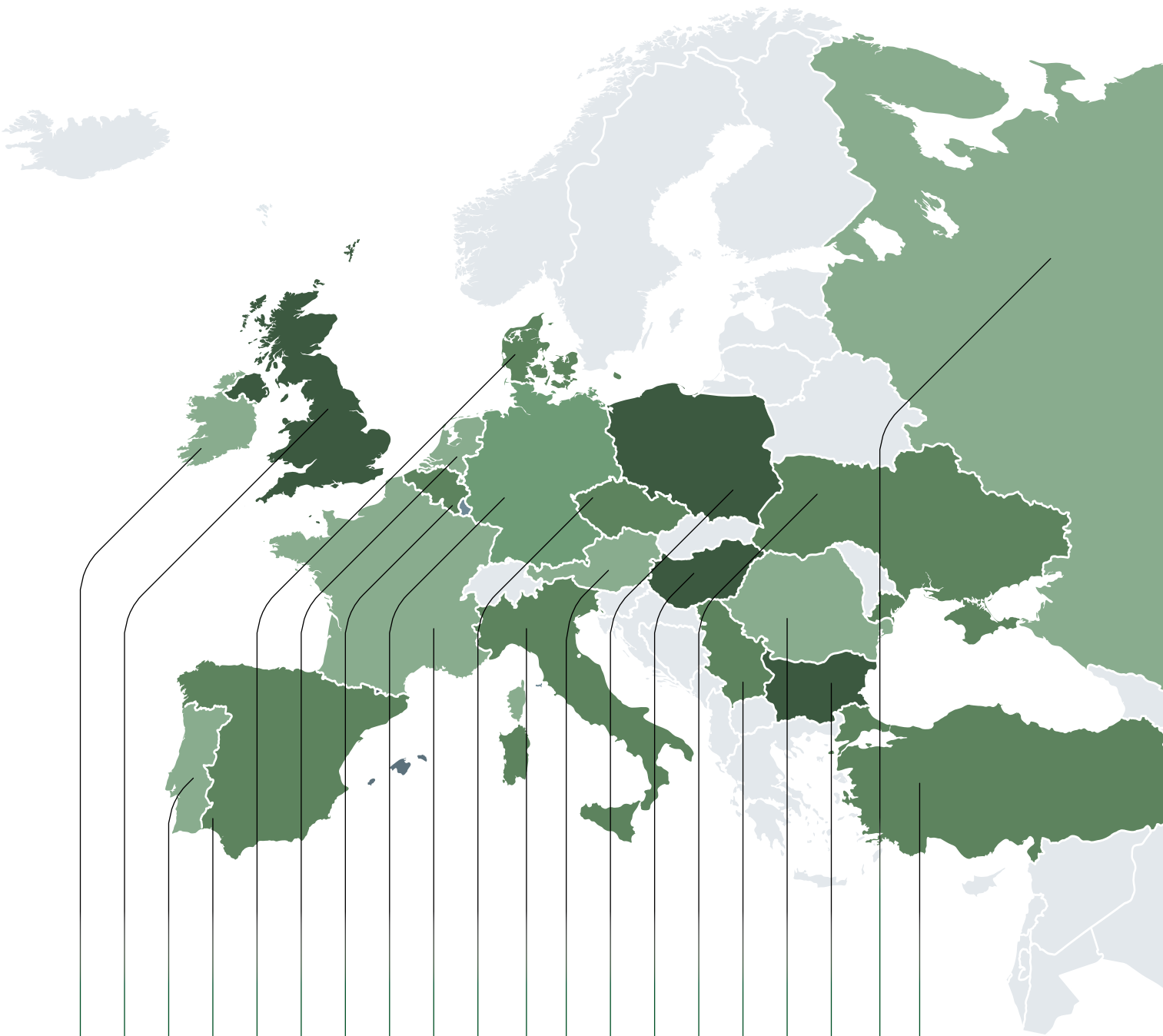
POP 7.6
GNP 39.6
PROD 5,770
PCC 74
MS 56%

■ ZAGORKA HEI
■ KAMENITZA ABI
■ CARLSBERG BUL

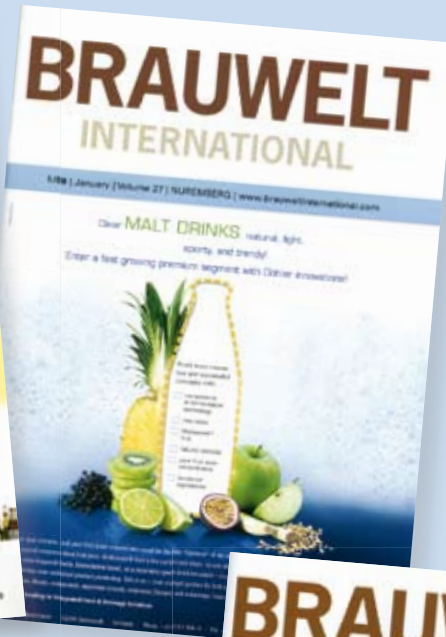
Quick Helper

POP: Population in million
GNP: Gross National Product in billion US\$
PROD: Production of beer in million of hectoliters
* Estimate
PCC: Per Capita Consumption beer in liters
MS: Market Share

■ ABI AB INBEV
■ SAB SAB-MILLER
■ HEI HEINEKEN
■ CAR CARLSBERG
■ MOCO MOLSON-COORS
■ KIR KIRIN
■ ASA ASAHI



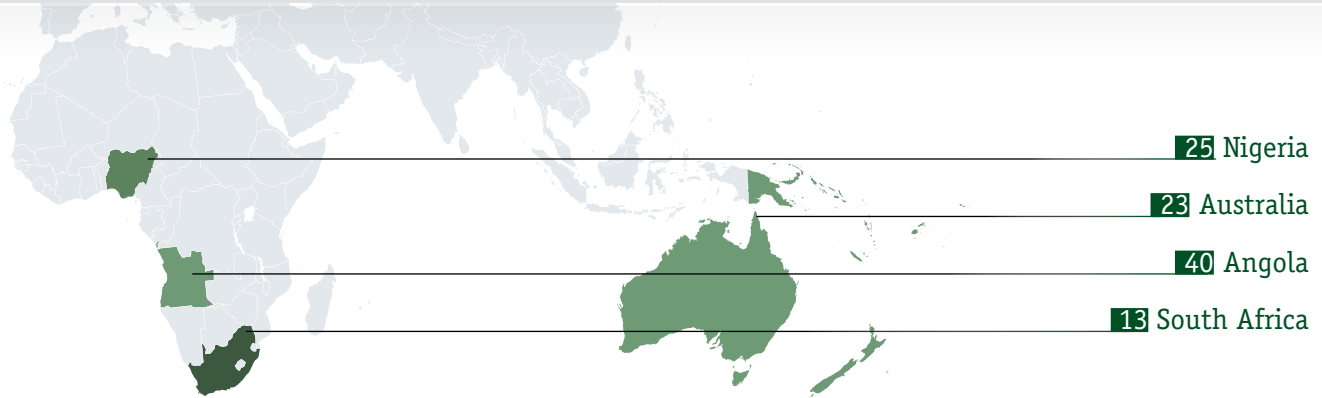
- Turkey 31
- Russia 3
- Bulgaria 39
- Romania 16
- Serbia 37
- Ukraine 11
- Hungary 36
- Poland 9
- Austria 32
- Italy 28
- Czech Rep. 18
- France 26
- Germany 5
- Belgium 22
- Netherlands 12
- Denmark 35
- Spain 10
- Portugal 34
- U. K. 8
- Ireland 33



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13 South Africa

POP 47.9
GNP 273.6
PROD 25,900
PCC 59
MS 95%

■ SAB

25 Nigeria

POP 148.1
GNP 114.4
PROD 15,400
PCC 9
MS 94%

■ NIGERIAN BR. HEI
■ GUINNESS NIG. DIAGEO

40 Angola

POP 17.5
GNP 53.0
PROD 5,325
PCC 25
MS 95%

■ SABA-CASTEL Sab
■ N.GOLA SAB

23 Australia

POP 21.0
GNP 848.8
PROD 17,080
PCC 85
MS 82%

■ FOSTERS
■ LION NATHAN KIR

Quick Helper

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■ HEI HEINEKEN
■ CAR CARLSBERG
■ MOCO MOLSON-COORS
■ KIR KIRIN
■ ASA ASAHI

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More about hops

Hop Science Newsletter

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

The Barth-Haas Grants

The Barth-Haas Group wants to support research activities that focus on the use of hops and hop products in all kinds of brewing applications. Therefore the Group confers grants for students of brewing science worldwide. Learn more about the Grants on www.barthhaasgroup.com.

The Barth-Haas Grants 2009 were given to the following awardees and each will receive a grant of 2,000 euros:

University/Institute	Research/Supervisor	Form of project	Titel
Heriot-Watt University, Edinburgh, UK	Prof. Paul Hughes	Master Thesis	Instrumental bitterness detection based on a sensory partitioning mechanisms
Universita Politecnica de Madrid	Alfonso Herrera	Master Thesis	Development of sun struck flavour in light-stable beers
TU München/ BRI Nutfield	Dr. Krottenthaler/ C. Walker	Research Project	Degradation products of the iso-alpha acids: Factors affecting their formation, development of a routine analysis and their influence on the sensory properties of beer
TU München	Dr. Illberg/ Claudia Ronquillo	Master Thesis	Hop/hop products and gushing
TU Berlin	Prof. Frank-Juergen Methner	Research Project	The anti-radical behaviour of hop constituents and their contribution to the beer staling

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50 % reduction in flushing
volume and backwashing

100 % pure filter cellulose

No change of colour,
flavour, or taste

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BEGEROW

Market leaders 2008 and their challengers in the top 40 countries

	beer production 2000	beer production 2007	beer production 2008
1 CHINA	220,000	393,137	410,301
2 USA	232,500	232,839	231,772
3 RUSSIA	54,900	115,000	114,000
4 BRAZIL	82,600	96,000 *	106,300 *
5 GERMANY	110,429	103,970	102,860
6 MEXICO	57,812	81,000	82,343
7 JAPAN	70,998	62,804	61,111
8 U.K.	55,279	51,341	49,469
9 POLAND	24,000	35,500	35,600
10 SPAIN	26,400	34,350	33,400
11 UKRAINE	10,270	31,561	32,030
12 NETHERLANDS	25,072	27,259	26,500 *
13 SOUTH AFRICA	24,500	26,530	25,900
14 VENEZUELA	18,590	26,249	24,905
15 CANADA	23,074	23,920	23,662
16 ROMANIA	12,097	19,422	20,774
17 THAILAND	11,543	21,700	20,725
18 CZECH REP.	17,916	19,897	19,806
19 COLUMBIA	13,500	19,000 *	19,000 *
20 SOUTH KOREA	18,568	17,886	18,615
21 VIETNAM	7,430	18,000	18,499
22 BELGIUM	14,733	18,565	17,796
23 AUSTRALIA	17,150	16,770	17,080
24 ARGENTINA	12,000	14,500 *	15,500 *
25 NIGERIA	6,300	13,500	15,400
26 FRANCE	18,926	15,096	14,430
27 PHILIPPINES	12,200	13,600 *	13,300
28 ITALY	12,575	13,520	13,212
29 PERU	5,627	9,236	10,800
30 INDIA	5,500	9,000	9,950
31 TURKEY	6,903	9,205	9,900
32 AUSTRIA	8,750	9,044	8,937
33 IRELAND	8,710	9,270	8,846
34 PORTUGAL	6,451	8,191	8,208
35 DENMARK	7,460	8,042	7,870
36 HUNGARY	7,300	7,550	7,049
37 SERBIA	---	6,067	6,366
38 CHILE	4,193	5,680	5,870
39 BULGARIA	4,115	5,686	5,770
40 ANGOLA	1,232	3,958	5,325

Quick Helper

Production of beer
in 1,000 hectoliters

* Estimate

Total	1,277,603	1,653,845	1,679,181
World beer production 2008			1,815,616
Market share top 40 countries 2008			92.5 %

The 40 largest brewing groups

Merger and Acquisition Highlights of the 40 largest brewing groups worldwide as of 31 December 2008

The mainly debt financed take-over of Anheuser-Busch by InBev was, of course, the event of the year creating by far the world's largest brewer with some 388 million hl annual beer production (excluding the volumes of Modelo, Mexico). The new company is called AB InBev. It produces roughly every 4th beer in the world and has joined ranks with the world's largest consumer goods companies.

The dissection of Scottish&Newcastle by the Heineken-Carlsberg "consortium" was a further milestone in the "beer monopoly" bringing the BBH-Group into the Carlsberg fold.

Another mega-merger went almost unnoticed in the hectic year 2008: SABMiller and Molson-Coors pooled their US activities under a newly formed Joint Venture by the name of MillerCoors with SABMiller holding 58 % of the new entity and Molson-Coors the remaining 42 %.

The disappearance of a number of breweries from the Top 40 List (Anheuser-Busch, BBH, S&N) made space in the league table for some newcomers: Saigon Beverage Corporation (SABECO), Vietnam, and United Brewery, India.

We have also decided to list China Resources Breweries Ltd., China, separately this year, of which SABMiller holds a 49 % share and which was included in SABMiller in our report for 2007, as SABMiller's operational control seems limited.



For 114 years Doemens in Munich-Gräfelfing has been a capable and professional partner to the brewing and beverage-industry.

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- Doemens Technicum provides a wide variety of specialists to help in any field beverage-industrie has to cope with.
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www.doemens.org or www.worldbrewingacademy.com

The 40 largest brewing groups

The 40 largest brewing groups worldwide as of 31.12.2008

Brewery and Rank	Country	Production vol. 2008 in mill. hl	Percentage of world beer production
1 AB InBev ¹⁾	Belgium	388.1	21.4 %
2 SABMiller ²⁾	United Kingdom	174.4	9.6 %
3 Heineken	Netherlands	161.5	8.9 %
4 Carlsberg	Denmark	109.3	6.0 %
5 China Resource Brewery Ltd.	China	73.0	4.0 %
6 Tsingtao Brewery Group	China	54.3	3.0 %
7 Grupo Modelo	Mexico	51.5	2.8 %
8 Molson-Coors	USA/Canada	51.1	2.8 %
9 Yanjing	China	42.2	2.3 %
10 Femsa	Mexico	41.1	2.3 %
11 Asahi	Japan	23.1	1.3 %
12 Kirin	Japan	22.7	1.3 %
13 Efes Group	Turkey	22.6	1.2 %
14 BGI/ Groupe Castel	France	19.8	1.1 %
15 Polar	Venezuela	19.0	1.0 %
16 Diageo (Guinness) ³⁾	Ireland	19.0	1.0 %
17 Gold Star	China	18.5	1.0 %
18 Chongqing Beer	China	17.7	1.0 %
19 Grupo Schincariol	Brazil	17.0	0.9 %
20 San Miguel Corporation	Philippines	17.0	0.9 %
21 Radeberger Gruppe	Germany	13.5	0.7 %
22 Grupo Mahou - San Miguel	Spain	12.2	0.7 %
23 Pearl River	China	11.9	0.7 %
24 Obolon	Ukraine	11.3	0.6 %
25 Hite	South Korea	11.1	0.6 %
26 Singha Corporation	Thailand	11.0	0.6 %
27 Foster's Group	Australia	9.0	0.5 %
28 Petropolis	Brazil	9.0	0.5 %
29 CCU	Chile	8.9	0.5 %
30 Lion Nathan ⁴⁾	Australia/New Zealand	8.5	0.5 %
31 Oettinger	Germany	8.5	0.5 %
32 Beer Thai (Chang)	Thailand	8.3	0.5 %
33 Saigon Beverage Corp. (SABECO)	Vietnam	8.1	0.4 %
34 Damm	Spain	7.7	0.4 %
35 Suntory	Japan	7.6	0.4 %
36 Bitburger Braugruppe	Germany	7.4	0.4 %
37 Sapporo	Japan	7.2	0.4 %
38 United Brewery	India	6.4	0.4 %
39 Shenzhen Kingway	China	6.3	0.3 %
40 Shanghai Suntory	China	6.2	0.3 %
Total		1,523.0	83.9 %
World beer production 2008		1,815.6	100.0 %

Quick Helper

The data were taken from the brewer's own annual reports. In other cases, the production volume had to be estimated after different sources had reported differing or no figures.

¹⁾ Without Modelo

²⁾ Without China Resource Brewery Ltd.

³⁾ Last year's figure, no new data available

⁴⁾ In May 2009 majority take over by Kirin

Hops are our World

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