

The Barth-Haas Group and Germain Hansmaennel present

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## Beer Production

Market Leaders and their Challengers  
in the Top 40 Countries in 2010



**BARTH-HAAS** **GROUP**

#### **BARTH-HAAS GROUP FURTHER ENHANCES HOP EXPERTISE**

The Barth-Haas Group, the world's leading provider of hop-related services, has further expanded its hop expertise. The leading position in the world market gives the Group no cause for complacency. In this situation above all, the Group feels required to further enhance the expertise in hops. That is why the Barth-Haas Group has launched two new initiatives, the Barth-Haas Hops Academy and Barth Innovations Ltd.

Barth Innovations Ltd is the Group's new think-tank. All Group research activities will be concentrated there. In particular, new hop-based products will be developed in close cooperation with the various companies in the Group, but also with universities and research institutions.

The Barth-Haas Hops Academy will be offering courses directed particularly towards technicians and buyers working for breweries. Individual hop-related topics will be dealt with in a wide range of seminars. The focus of these seminars ranges from hop growing to the hop market, and includes harvesting, processing, plant protection, safety, analytics, sensor technology, storage and the potential uses of hops in the brewing process. The feedback after the first courses demonstrates the success of the idea: "It really is a must for everybody involved in hops in the brewery: brewmasters, sourcing executives, quality managers, and those responsible for developing new beers."

**barth!nnovations**  
unlocking the potential of hops

Register now for our seminar on  
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at [www.hopsacademy.com](http://www.hopsacademy.com)

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reddot design award

### RANKING

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

**POPULATION (POP):** Million inhabitants.

**GROSS NATIONAL PRODUCT (GNP):** in billion US-dollars.

**PRODUCTION (PROD):** Production of beer in million hectolitres.

**PER CAPITA CONSUMPTION (PCC):** Beer in litres.

**MARKET SHARE (MS):** Market share based on the breweries' domestic sales. The breweries are mentioned in the national ranking either if their market share is higher than 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.

### FINANCIAL PARTICIPATION

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

### BREWERY GROUPS - ABBREVIATIONS

■ ABI	AB INBEV
■ SABM	SAB-MILLER
■ HEI	HEINEKEN
■ CAR	CARLSBERG
	MOCO MOLSON-COORS
	KIR KIRIN
	STA STARBEV

**SOURCES:** Barth-Report 2010/2011, United Nations and World Bank Statistics

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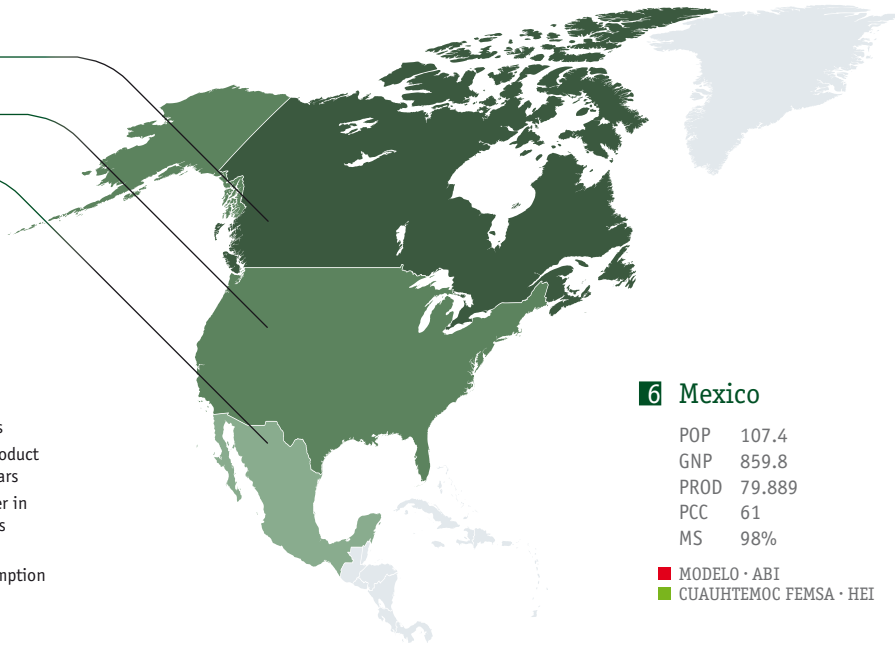
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# North and Central America

Canada **15**

USA **2**

Mexico **6**



**2** USA

POP 306.9  
GNP 14,044.0  
PROD 227.838  
PCC 79  
MS 80%

■ AB INBEV · ABI  
■ MILLERCOORS SABM/moco

## Quick Helper

POP: Million inhabitants  
GNP: Gross National Product in billion US-dollars  
PROD: Production of beer in million hectolitres  
\* Estimate  
PCC: Per Capita Consumption Beer in litres  
MS: Market Share

■ ABI AB INBEV  
■ SABM SAB-MILLER  
■ HEI HEINEKEN  
■ CAR CARLSBERG  
■ MOCO MOLSON-COORS  
■ KIR KIRIN  
■ STA STARBEV

**6** Mexico

POP 107.4  
GNP 859.8  
PROD 79.889  
PCC 61  
MS 98%

■ MODELO · ABI  
■ CUAUHTEMOC FEMSA · HEI

**15** Canada

POP 33.6  
GNP 1,325.4  
PROD 22.200 \*  
PCC 66  
MS 83%

■ MOLSON · MOCO  
■ LABATT · ABI

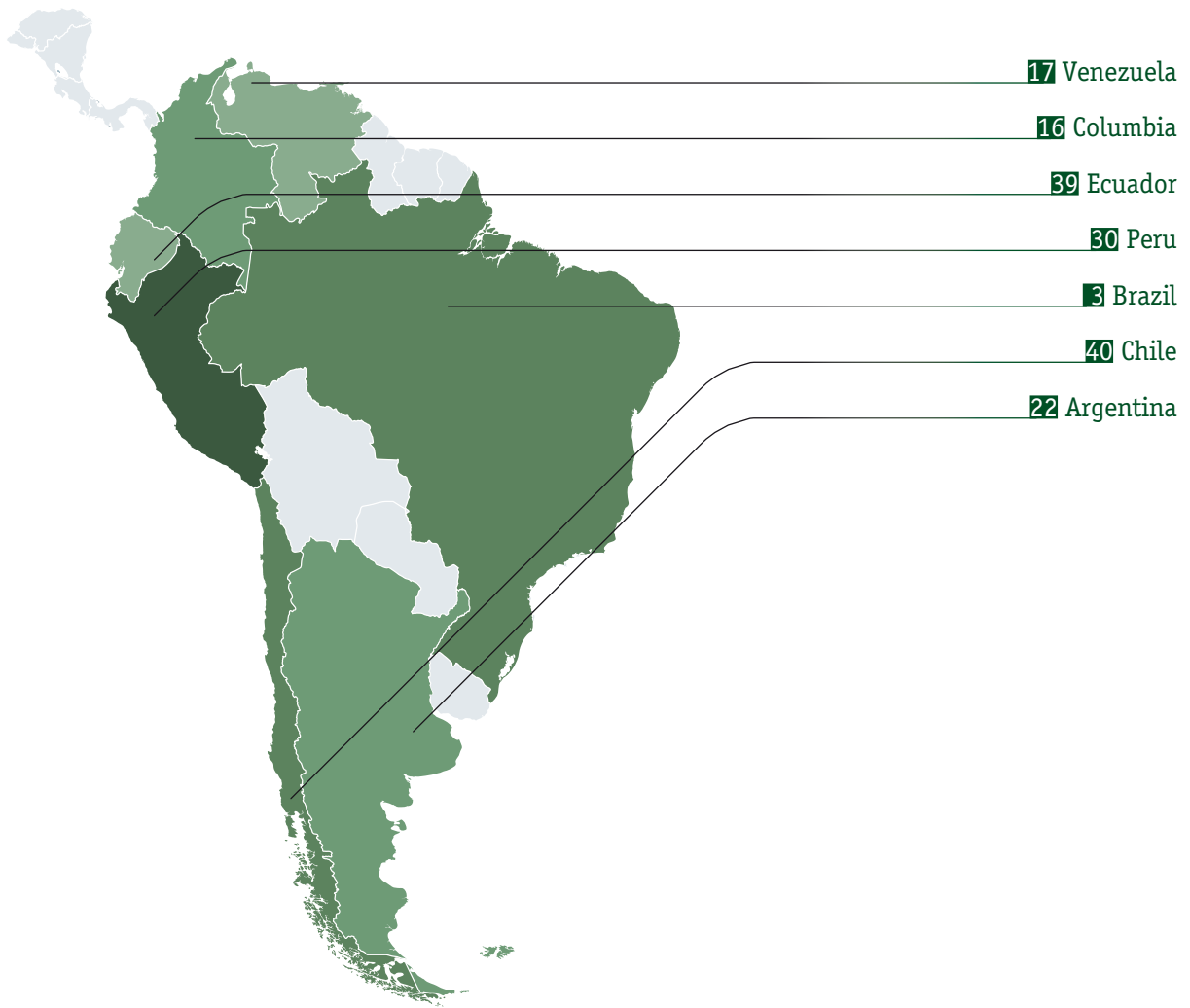
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## 3 Brazil

POP 193.8  
GNP 1,485.0  
PROD 114.000 \*  
PCC 58  
MS 99%

■ AMBEV · ABI  
■ SHINCARIOL  
■ PETROPOLIS  
■ KAISER FEMSA · HEI

## 16 Columbia

POP 45.6  
GNP 222.6  
PROD 20.500  
PCC 41  
MS 98%

■ BAVARIA SABM

## 17 Venezuela

POP 28.3  
GNP 332.4  
PROD 20.000 \*  
PCC 80  
MS 100%

■ POLAR  
■ REGIONAL-BRAHMA

## 22 Argentina

POP 40.2  
GNP 303.1  
PROD 17.500 \*  
PCC 45  
MS 90%

■ QUILMES · ABI  
■ CCU ARG · hei

## 30 Peru

POP 29.1  
GNP 120.0  
PROD 11.000  
PCC 44  
MS 96%

■ BACKUS&JOHNSTON · SABM  
■ AMBEV PERU · ABI

## 39 Ecuador

POP 16.8  
GNP 55.7  
PROD 5.700  
PCC 36  
MS 96%

■ CERVECAS NAC. · SABM

## 40 Chile

POP 13.9  
GNP 147.2  
PROD 5.680  
PCC 33  
MS 100%

■ CCU · hei  
■ CIA CHILE · ABI

## Quick Helper

POP: Million inhabitants  
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PROD: Production of beer in million hectolitres  
\* Estimate  
PCC: Per Capita Consumption Beer in litres  
MS: Market Share

■ ABI AB INBEV  
■ SABM SAB-MILLER  
■ HEI HEINEKEN  
■ CAR CARLSBERG  
■ MOCO MOLSON-COORS  
■ KIR KIRIN  
■ STA STARBEV



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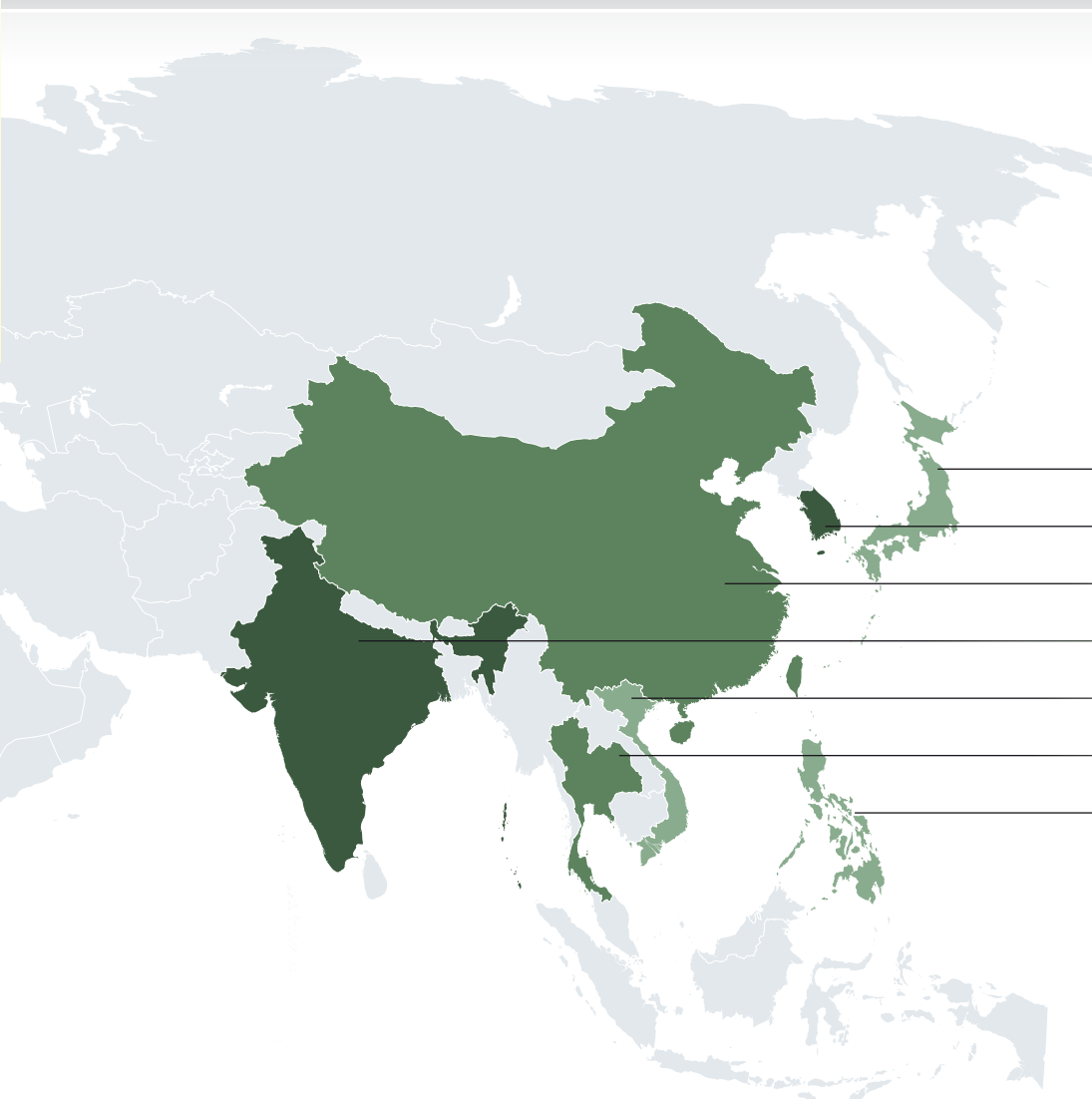
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GETRÄNKEFACHGROSSHANDEL

Helga Reß, Phone +49/82 61/9 99-3 32





**7** Japan

**19** South Korea

**1** China

**27** India

**13** Vietnam

**18** Thailand

**26** Philippines

## 1 China

POP 1,334.4  
GNP 4,733.5  
PROD 448.304  
PCC 35  
MS 50%

■ CRE SNOW · sabm  
■ TSINGTAO · asahi  
■ YANJING  
■ AB INBEV CHINA · ABI

## 7 Japan

POP 127.6  
GNP 5,250.8  
PROD 59.630  
PCC 49  
MS 96%

■ KIRIN · kir  
■ ASAHI  
■ SUNTORY  
■ SAPPORO

## 13 Vietnam

POP 87.2  
GNP 90.2  
PROD 26.500 \*  
PCC 29  
MS 79%

■ SAIGON BR.  
■ HANOI BR. · car  
■ APB · hei

## 18 Thailand

POP 67.8  
GNP 253.5  
PROD 19.980  
PCC 28  
MS 93%

■ SINGHA CORP  
■ THAIBEV CHANG

## 19 South Korea

POP 48.7  
GNP 835.9  
PROD 18.173  
PCC 38  
MS 100%

■ HITE  
■ ORIENTAL BR.

## 26 Philippines

POP 91.9  
GNP 170.3  
PROD 15.700  
PCC 17  
MS 93%

■ SAN MIGUEL · kir

## 27 India

POP 1,155.1  
GNP 1,181.2  
PROD 15.600  
PCC 1  
MS 74%

■ UNITED BR. · hei  
■ SAB INDIA · SABM

## Quick Helper

POP: Million inhabitants  
GNP: Gross National Product in billion US-dollars  
PROD: Production of beer in million hectolitres  
\* Estimate  
PCC: Per Capita Consumption Beer in litres  
MS: Market Share

■ ABI AB INBEV  
■ SABM SAB-MILLER  
■ HEI HEINEKEN  
■ CAR CARLSBERG  
■ MOCO MOLSON-COORS  
■ KIR KIRIN  
■ STA STARBEV

# Western, Central and Eastern Europe

## 4 Russia

POP 141.8  
GNP 1,207.1  
PROD 102.930  
PCC 73  
MS 76%

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

## 5 Germany

POP 81.9  
GNP 3,385.4  
PROD 95.683  
PCC 107  
MS 38%

■ RADEBERGER GR  
■ INBEV GER · ABI  
■ OETTINGER  
■ BITBURGER GP

## 8 UK

POP 61.8  
GNP 2,222.5  
PROD 44.997  
PCC 81  
MS 75%

■ HEINEKEN UK · HEI  
■ CBL · MOCO  
■ INBEV UK · ABI  
■ CARLSBERG UK · CAR

## 9 Poland

POP 38.1  
GNP 415.7  
PROD 33.900  
PCC 85  
MS 90%

■ KOMP. PIWOWARSKA · SABM  
■ ZYWIEC · HEI  
■ OKOCIM · CAR

## 10 Spain

POP 46.2  
GNP 1,426.9  
PROD 33.375  
PCC 80  
MS 82%

■ MAHOU · SAN MIGUEL  
■ HEINEKEN SP · HEI  
■ DAMM

## 11 Ukraine

POP 46.0  
GNP 115.2  
PROD 31.000  
PCC 57  
MS 94%

■ SUN INBEV · ABI  
■ BBH · CAR  
■ OBOLON

## 14 Netherlands

POP 16.5  
GNP 807.8  
PROD 23.936  
PCC 74  
MS 82%

■ HEINEKEN NL · HEI  
■ BAVARIA  
■ GROLSCH · SABM  
■ INBEV NL · ABI

## 20 Belgium

POP 10.8  
GNP 470.3  
PROD 18.123 \*  
PCC 82  
MS 68%

■ INBEV · ABI  
■ ALKEN-MAES · HEI

## 24 Czech Rep.

POP 10.5  
GNP 180.4  
PROD 17.100  
PCC 144  
MS 77%

■ PLZENSKY PRAZDROJ · SABM  
■ STAROPRAMEN STA  
■ HEINEKEN CZ · HEI

## 25 Romania

POP 21.4  
GNP 157.3  
PROD 15.700  
PCC 80  
MS 79%

■ SAB RO · SABM  
■ BRAU UNION RO · HEI  
■ BERGENBIER STA

## 28 France

POP 61.6  
GNP 2,684.0  
PROD 14.290  
PCC 30  
MS 61%

■ KRONENBOURG · CAR  
■ HEINEKEN FR · HEI

## 29 Italy

POP 60.2  
GNP 2,081.8  
PROD 12.370  
PCC 28  
MS 52%

■ HEINEKEN ITA · HEI  
■ PERONI · SABM

## 31 Turkey

POP 74.8  
GNP 619.1  
PROD 9.670 \*  
PCC 13  
MS 99%

■ EFES  
■ TURK TUBORG

## 32 Austria

POP 8.3  
GNP 375.1  
PROD 8.670  
PCC 106  
MS 58%

■ BRAU UNION HEI  
■ STIEGL

## 33 Portugal

POP 10.6  
GNP 217.5  
PROD 8.312  
PCC 57  
MS 94%

■ UNICER · CAR  
■ CENTRALCER · HEI

## 34 Ireland

POP 4.5  
GNP 194.3  
PROD 8.249  
PCC 99  
MS 56%

■ GUINNESS DIAGEO  
■ MURPHY · HEI

## Quick Helper

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PROD: Production of beer in million hectolitres  
\* Estimate  
PCC: Per Capita Consumption Beer in litres  
MS: Market Share

## 36 Denmark

POP 5.5  
GNP 315.4  
PROD 6.335  
PCC 64  
MS 70%

■ CARLSBERG · CAR  
■ ROYAL UNIBREW

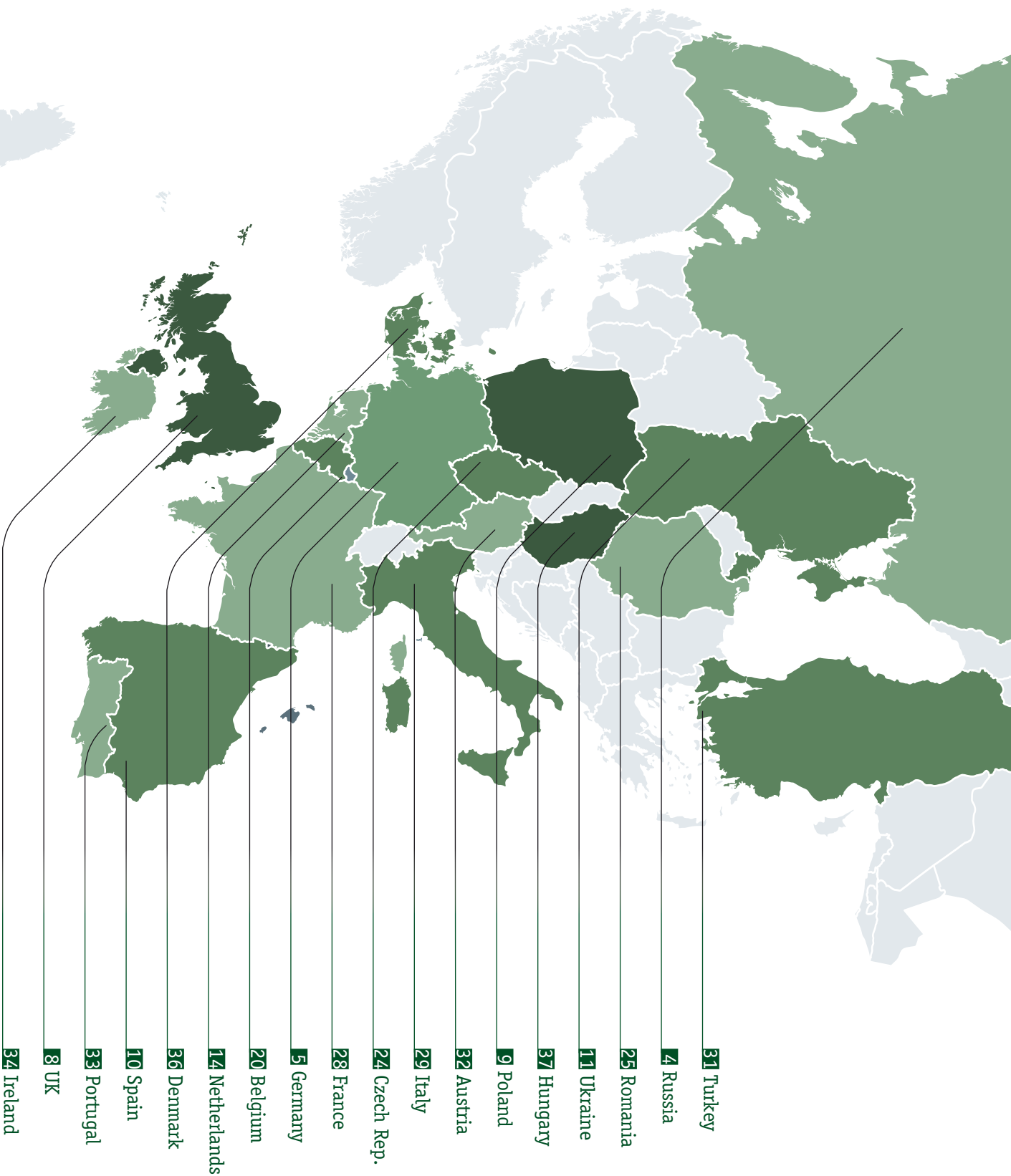
## 37 Hungary

POP 10.0  
GNP 118.4  
PROD 6.000 \*  
PCC 63  
MS 90%

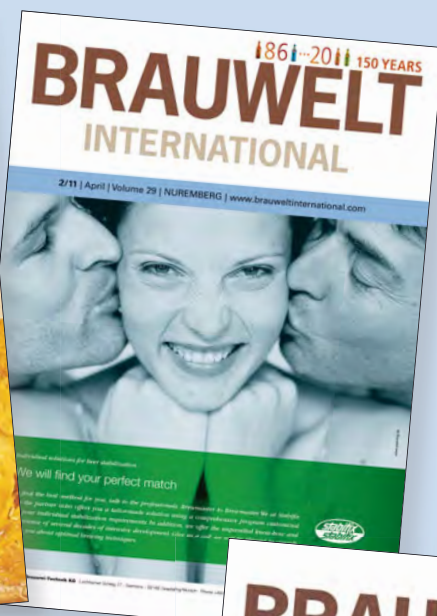
■ BRAU UNION HEI  
■ DREHER SORGYAR · SABM  
■ BORSODI SORGYAR · STA

■ ABI AB INBEV  
■ SABM SAB-MILLER  
■ HEI HEINEKEN  
■ CAR CARLSBERG  
■ MOCO MOLSON-COORS  
■ KIR KIRIN  
■ STA STARBEV

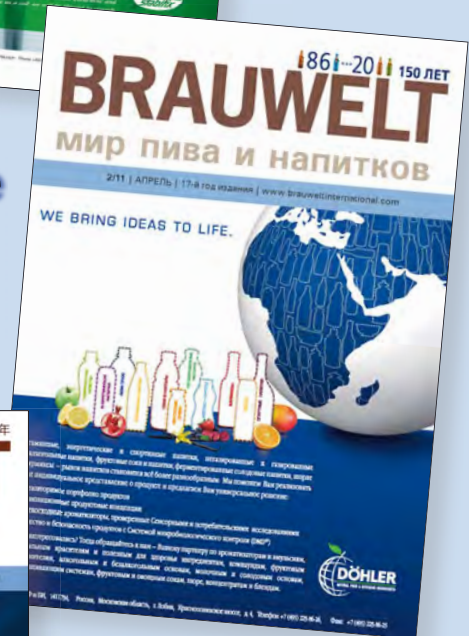




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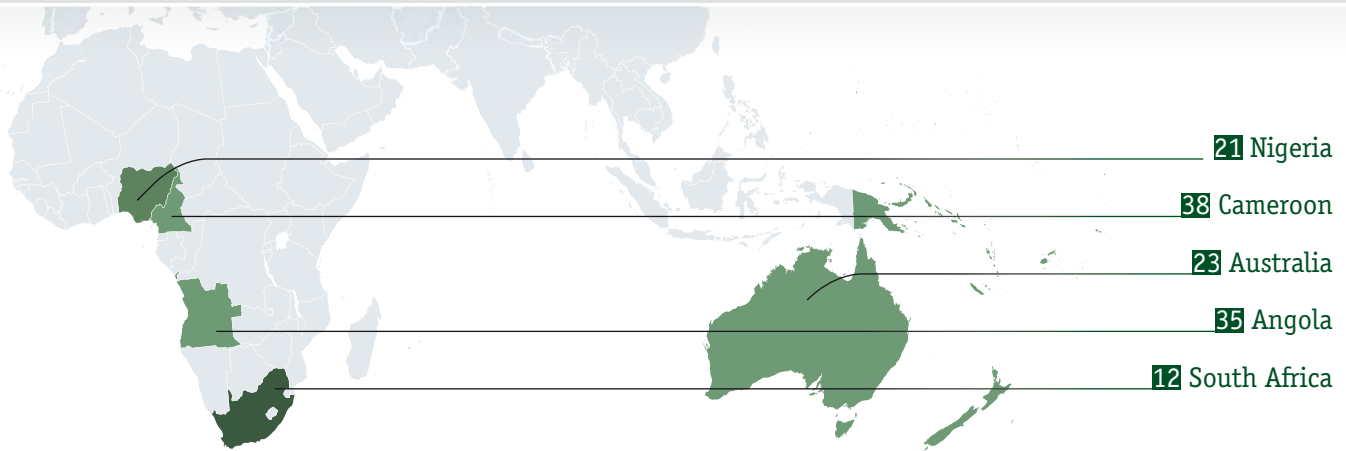


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21 Nigeria

38 Cameroon

23 Australia

35 Angola

12 South Africa

## 12 South Africa

POP 49.5  
GNP 277.6  
PROD 29.600  
PCC 59  
MS 99%

■ SAB · SABM  
■ SEDIBENG BR. · HEI

## 21 Nigeria

POP 154.7  
GNP 163.3  
PROD 17.600  
PCC 9  
MS 90%

■ NIGERIAN BR. · HEI  
■ GUINNESS NIG. · DIAGEO

## 35 Angola

POP 18.4  
GNP 5.7  
PROD 7.362  
PCC 48  
MS 88%

■ CUCA BR. · sabm

## 38 Cameroon

POP 19.5  
GNP 222.6  
PROD 5.890  
PCC 35  
MS 99%

■ SABC-CASTEL · sabm  
■ DIAGEO

## 23 Australia

POP 21.8  
GNP 911.6  
PROD 17.420  
PCC 82  
MS 82%

■ FOSTERS  
■ LION NATHAN · KIR

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## The Barth-Haas grants – your hops research opportunity

Since 2007 the Barth-Haas Group has awarded five grants of 2.000 EUR each year to support research ideas that focus on hops and hop products in brewing. Our grants have become so successful that hop research is now experiencing a revival. The 22 ideas funded so far reveal just the tip of the iceberg concerning the unknown properties of hops.

The previously funded research projects looked into

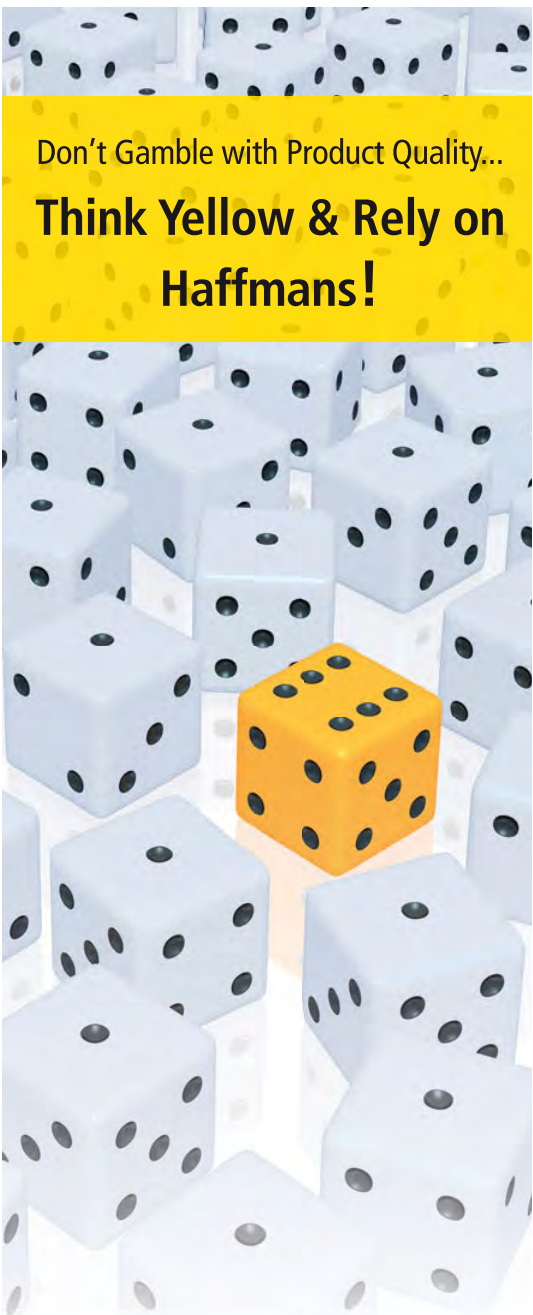
- hop derived anti-foams
- dry hopping techniques
- hop aroma utilisation during brewing
- the role of hops in flavour stability
- instrumental bitterness detection
- hops and gushing
- hop derived flavour active compounds

While these research projects have answered many questions, as is often the case in the world of science, they have also generated many more interesting questions at the same time. To meet with the increasing number of applications we have decided this year to support eight research ideas with our grants. **The 2011 winners are listed on page 14.**

## More about hops

Our **Hop Science Newsletter** informs subscribers about the latest research activities and new findings to provide readers with all kinds 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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## World beer production ranking

Country	Beer production 2000	Beer production 2009	Beer production 2010
1 CHINA	220.000	423.638	448.304
2 USA	232.500	230.937	227.838
3 BRAZIL	82.600	107.000	114.000 *
4 RUSSIA	54.900	108.500	102.930
5 GERMANY	110.429	98.078	95.683
6 MEXICO	57.812	82.325	79.889
7 JAPAN	70.998	59.820	59.630
8 UK	55.279	45.141	44.997
9 POLAND	24.000	32.200	33.900
10 SPAIN	26.400	33.800	33.375
11 UKRAINE	10.270	30.500	31.000
12 SOUTH AFRICA	24.500	28.800	29.600
13 VIETNAM	7.430	23.000	26.500 *
14 NETHERLANDS	25.072	25.376	23.936
15 CANADA	23.074	22.394	22.200 *
16 COLUMBIA	13.500	20.140	20.500
17 VENEZUELA	18.590	23.141	20.000 *
18 THAILAND	11.543	19.450	19.980
19 SOUTH KOREA	18.568	17.995	18.173
20 BELGIUM	14.733	18.009	18.123 *
21 NIGERIA	6.300	16.000	17.600
22 ARGENTINA	12.000	17.000	17.500 *
23 AUSTRALIA	17.150	17.320	17.420
24 CZECH REP.	17.916	18.600	17.100
25 ROMANIA	12.097	17.600	15.700
26 PHILIPPINES	12.200	14.600	15.700
27 INDIA	5.500	15.500	15.600
28 FRANCE	18.926	14.314	14.290
29 ITALY	12.575	12.780	12.370
30 PERU	5.627	10.900	11.000
31 TURKEY	6.903	9.500	9.670 *
32 AUSTRIA	8.750	8.728	8.670
33 PORTUGAL	6.451	7.832	8.312
34 IRELAND	8.710	8.041	8.249
35 ANGOLA	1.232	6.869	7.362
36 DENMARK	7.460	6.046	6.335
37 HUNGARY	7.300	6.194	6.000 *
38 CAMEROON	3.674	6.200	5.890
39 ECUADOR	2.454	5.300	5.700
40 CHILE	4.193	5.923	5.680

### Quick Helper

Production of beer  
in million hectolitres

\* Estimate

Total	1,279.616	1,675.491	1,696.706
World beer production 2010			1,846.393
Market share top 40 countries 2010			91.9 %



# Barth-Haas grants: the winners 2011

	University/Institute	Research Supervisor/Student	Form of project	Title
1	TU München Weihenstephan, Germany	Dr. Martin Gastl	Master Thesis	Composition of Hop Proteins
2	TU Berlin, Germany	Roland Pahl	Research Project	What happens to Hop Aroma in PET bottles
3	Heriot-Watt University, Edinburgh, UK	Prof. Paul Hughes	Research Project	Microscopic characterisation of the lupulin glands of <i>Humulus lupulus</i> L.
4	Research Center Hüll, Germany	Anton Lutz	Research Project	Are HSI values hop variety specific
5	Oregon State University, USA	Prof. Tom Shellhammer	Research Project	Sensory Assessment of Dry Hop Aroma Utilizing Different Techniques and Hop Products
6	Universität Halle, Germany	Prof. M. Glomb	Master Thesis	Investigation of hop compounds during the ageing of beer
7	Oregon State University, USA	Prof. Tom Shellhammer	Research Project	Consumer preference for citrus, herbal, floral, and tropical fruity aroma in beer
8	TU München Weihenstephan, Germany	Dr. Martin Zarnkow	Research Project	Hops as a Regulator for the Red Coloration of Beer



For 115 years Doemens in Munich-Graefelfing has proven to be a capable and professional partner to the brewing and the beverage industry.

### Doemens Academy

educates brewmasters, foodstufftechnologists and is a reliable partner to all young people starting their career in the beverage industry.

### Doemens Savour Academy

is the world leading institute in training beer sommeliers as well as mineral water sommeliers. Doemens associated beer sommelier courses are also available in Italy, Brasil and in the US.

### Doemens Technicum

provides a wide variety of specialists to help in any field beverage-industry has to cope with.

### World Brewing Academy

offers English language courses in brewing-technology with classes in Chicago/USA and Munich/Germany.

For further information please contact us:  
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# The 40 largest brewing groups

## The 40 largest brewing groups worldwide as of 31. 12. 2010

Brewery	Country	Production vol. 2010 in mill. hl	Percentage of world beer production
1 AB InBev <sup>1)</sup>	Belgium	358.7	19.4 %
2 SABMiller <sup>2)</sup>	United Kingdom	172.3	9.3 %
3 Heineken	Netherlands	145.9	7.9 %
4 Carlsberg	Denmark	114.0	6.2 %
5 China Resource Brewery Ltd.	China	93.3	5.1 %
6 Tsingtao Brewery Group	China	64.0	3.5 %
7 Grupo Modelo	Mexico	51.9	2.8 %
8 Yanjing	China	50.3	2.7 %
9 Molson-Coors	USA/Canada	48.7	2.6 %
10 Kirin	Japan	30.3	1.6 %
11 Efes Group	Turkey	24.2	1.3 %
12 BGI / Groupe Castel	France	23.5	1.3 %
13 Diageo (Guinness)	Ireland	22.0	1.2 %
14 Asahi	Japan	21.8	1.2 %
15 Polar	Venezuela	20.7	1.1 %
16 Grupo Schincariol	Brazil	20.0	1.1 %
17 San Miguel Corporation	Philippines	19.9	1.1 %
18 Gold Star	China	19.3	1.0 %
19 Chongqing Beer	China	17.8	1.0 %
20 Radeberger Gruppe	Germany	13.1	0.7 %
21 StarBev	Czech Republic	13.0	0.7 %
22 Grupo Mahou - San Miguel	Spain	12.5	0.7 %
23 Pearl River	China	12.1	0.7 %
24 Singha Corporation	Thailand	11.9	0.6 %
25 Petropolis	Brazil	11.0	0.6 %
26 Hite	South Korea	10.4	0.6 %
27 Saigon Beverage Corp. (SABECO)	Vietnam	10.1	0.5 %
28 Obolon	Ukraine	9.9	0.5 %
29 CCU	Chile	9.3	0.5 %
30 Shenzhen Kingway	China	9.2	0.5 %
31 United Brewery	India	8.8	0.5 %
32 Damm	Spain	8.5	0.5 %
33 Foster´s Group	Australia	8.5	0.5 %
34 Oettinger	Germany	8.2	0.4 %
35 Oriental Brewery	South Korea	7.8	0.4 %
36 Suntory	Japan	7.5	0.4 %
37 Bitburger Braugruppe	Germany	7.4	0.4 %
38 Beer Thai (Chang)	Thailand	7.2	0.4 %
39 Sapporo	Japan	7.0	0.4 %
40 Habeco	Vietnam	6.0	0.3 %
<b>Total</b>		<b>1,518.0</b>	<b>82.2 %</b>
<b>World beer production 2010</b>		<b>1,846.4</b>	<b>100.0%</b>

### Merger and acquisition highlights among the 40 largest brewing groups worldwide

2010 was a comparatively uneventful year as far as mergers and acquisitions in the brewing sector are concerned. The biggest deal was made by Heineken acquiring the beer unit of FEMSA in Mexico and Brazil, which gave it a foothold in Latin-America and allows it to tap into these very profitable beer markets. Kirin consolidated its holdings in Lion Nathan, Australia, and acquired the remaining shares to become sole owner of the breweries in Australia and New Zealand.

With FEMSA and Lion Nathan disappearing from the league table, two new entries are now in the top 40 list: Oriental Breweries in Korea (divested by ABI in 2009) and Hanoi Beverage Company (HABECO) of Hanoi, Vietnam, in which Carlsberg holds a minority share.

Now that debt levels have largely been brought under control by the industry's consolidators more deals are expected to emerge while strategic options are being debated, e.g. geographic spread vs. synergies in one market, „beer only“ or tie-ups with other beverage categories (spirits, non-alcoholic), etc.

### 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.

<sup>1)</sup> Without Modelo

<sup>2)</sup> Without China

Resource Brewery Ltd.



## Tradition meets Innovation

The Barth-Haas Group is the global market leader in all products and services derived from hops. As a successful family-run company, we have been developing innovative hop-based products to meet brewers' needs for over 100 years. We are setting new standards in hop-based applications. Our customers benefit from our reliable partnership, extensive technical know-how and comprehensive service. We are the Barth-Haas Group and Hops are our World!

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