

BARTH-HAAS GROUP



The situation on the global beer market and hop market

Barley Malt Conference 2012

Equipment Facilities and Raw Material Base for Malting and Brewing Production

Moscow - 6/8 September 2012



Agenda

1. The situation on the global beer market

- 1.1. Development on the beer market
- 1.2. The biggest beer production countries
- 1.3. The largest brewing groups

2. The situation on the global hop market

- 2.1. Extremes of the hop market
- 2.2. Current key data 2012
- 2.3. Global leaders of hop cultivation

3. Flavor hops

A new category of hops

The situation on the global beer market and hop market

Contributor: Heinrich Meier

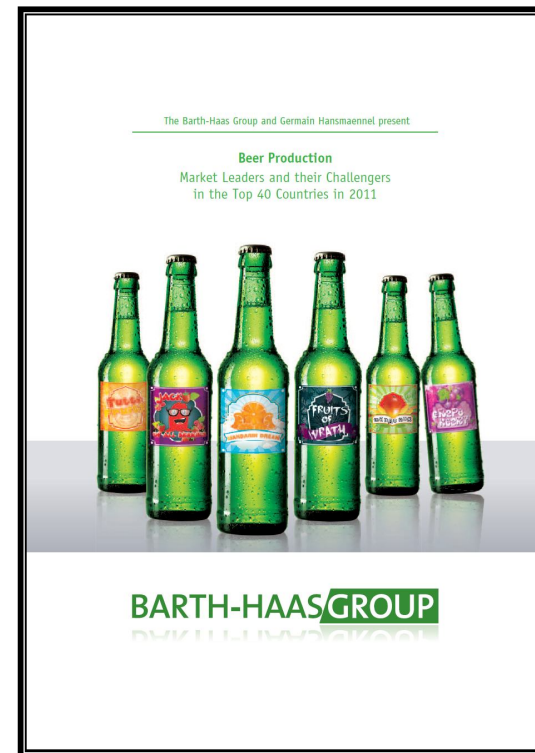
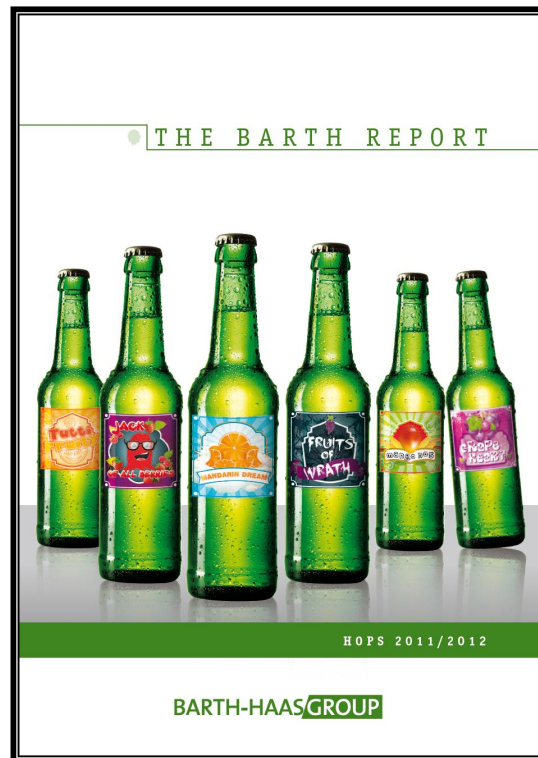
Editor Barth-Report

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The Barth Report - Beer Production Market Leaders Report



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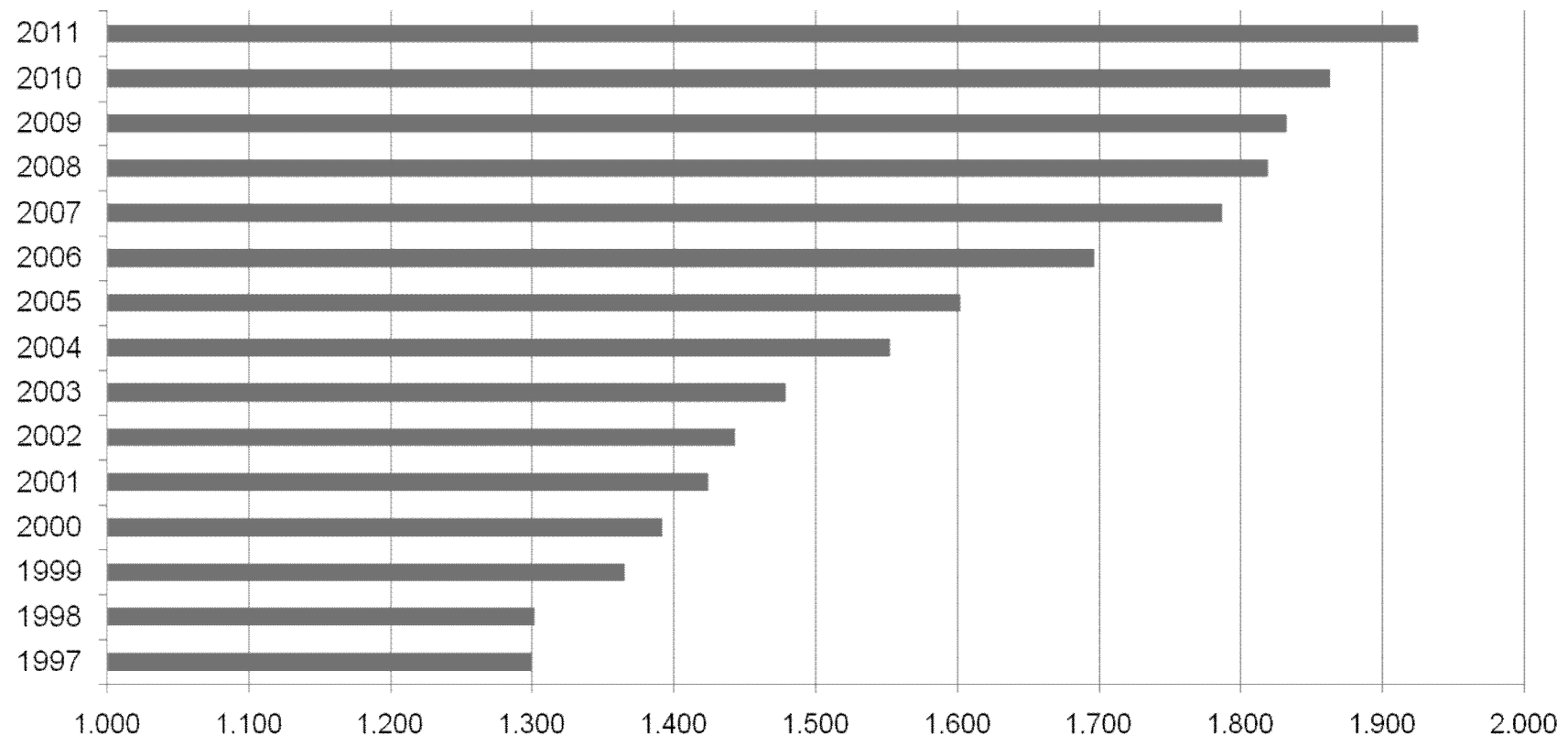
Members:



1. The situation on the global beer market

1.1. Development on the beer market

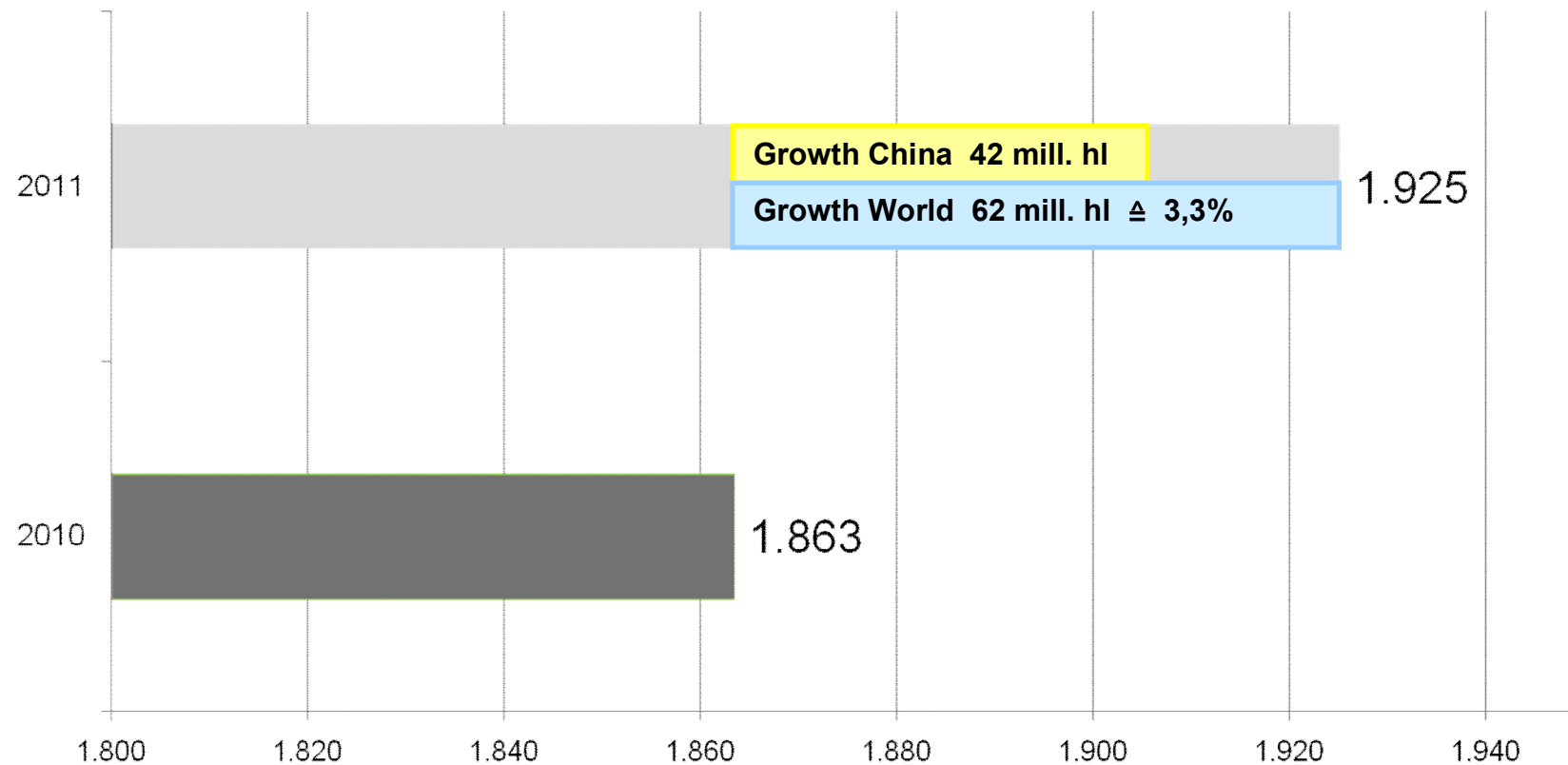
World beer production 1997 to 2011 - million hl



1. The situation on the global beer market

1.1. Development on the beer market

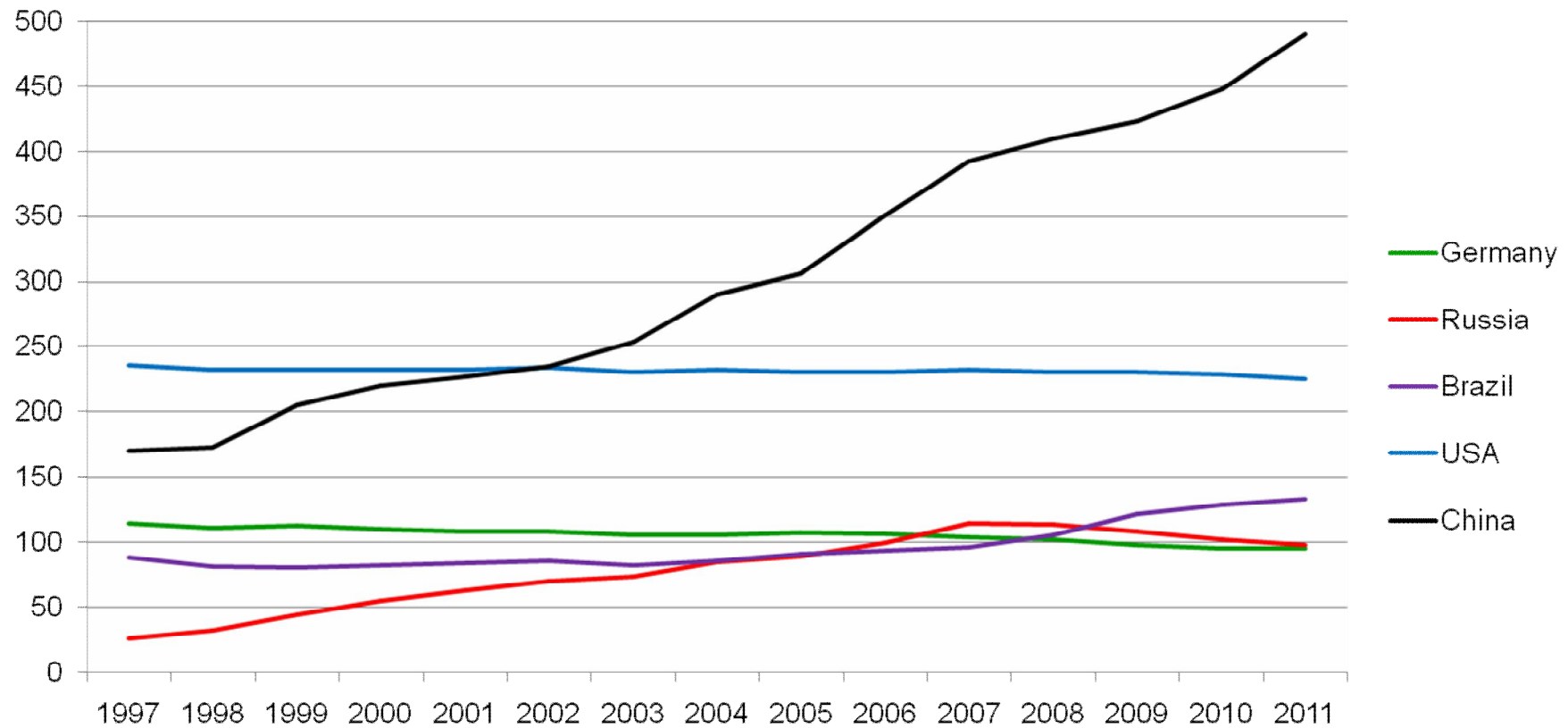
World beer production 2010 to 2011 - million hl



1. The situation on the global beer market

1.2. The biggest beer production countries

The five most important beer production countries 2011



1. The situation on the global beer market

1.2. The biggest beer production countries 2011

Rank	Country	Production million hl	Market share %		Rank	Country	Production million hl	Market share %
1	China	490	25%		21	South Korea	18	
2	USA	225	12%		22	Czech Republic	18	
3	Brasilia	133	7%		23	Belgium	18	
4	Russia	98	5%		24	Australia	17	
5	Germany	96	5%		25	France	17	
1 to 5		1,042	54%		26	Argentina	17	
6	Mexico	82			27	Romania	17	
7	Japan	56			28	Philippines	16	
8	U.K.	46			29	Italy	13	
9	Poland	38			30	Peru	12	
10	Spain	34			1 to 30		1,695	88%
1 to 10		1,297	67%		31	Turkey	10	
11	South Africa	31			32	Austria	9	
12	Ukraine	31			33	Portugal	8	
13	Vietnam	28			34	Angola	8	
14	Netherlands	24			35	Ireland	8	
15	Venezuela	24			36	Denmark	6	
16	Columbia	21			37	Hungary	6	
17	Thailand	21			38	Cameroon	6	
18	Nigeria	20			39	Serbia	6	
19	Canada	20			40	Ecuador	6	
20	India	19			1 to 40		1,768	92%
1 to 20		1,532	80%		Balance	132 Countries	157	8%

1. The situation on the global beer market

1.3. The largest brewing groups

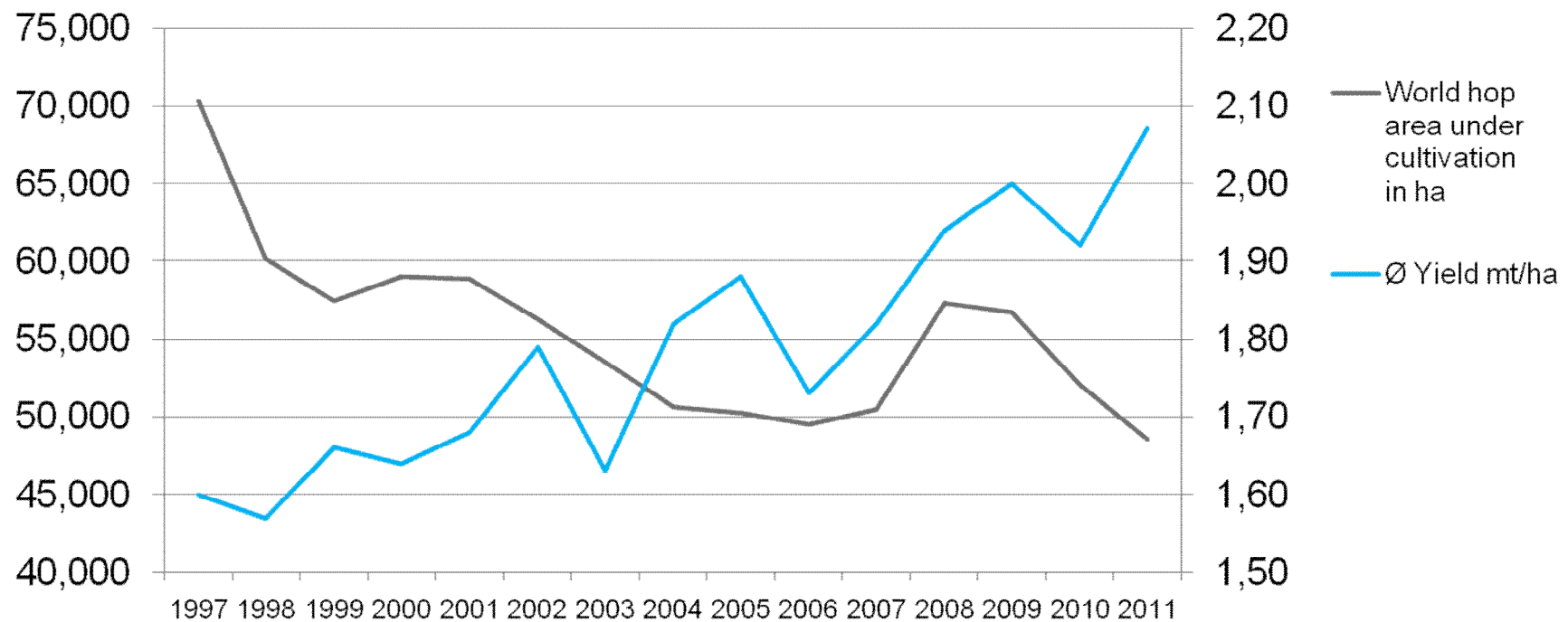
Rank	Brewery Group	Produktion vol. mill. hl	Market share %		Rank	Brewery Group	Produktion vol. mill. hl	Market share %
1	AB InBev	358.8	18.6%		21	Asia Pacific Breweries	13.3	
2	SABMiller	178.5	9.3%		22	StarBev	13.3	
3	Heineken	164.6	8.5%		23	Radeberger Gruppe	13.2	
4	Carlsberg	118.7	6.2%		24	Pearl River	12.9	
5	China Resource Brew.	103.3	5.4%		25	Singha Corporation	12.8	
1 to 5		923.9	48.0%		26	Gr. Mahou - San Miguel	12.6	
6	Tsingtao Brewery Group	72.8	3.8%		27	Saigon Beverage Corp.	11.8	
7	Grupo Modelo	55.1	2.9%		28	Hite	9.8	
8	Yanjing	55.0	2.9%		29	Oettinger	9.5	
9	Molson-Coors	48.4	2.5%		30	United Brewery	9.4	
10	BGI / Groupe Castel	24.7	1.3%		1 to 30		1,491.4	77.5%
1 to 10		1,179.9	61.3%		31	Oriental Brewery	9.3	
11	Efes Group	23.0			32	CCU	9.2	
12	Diageo (Guinness)	22.4			33	Shenzhen Kingway	9.0	
13	Asahi	21.2			34	Obolon	8.8	
14	Kirin	20.3			35	Damm	8.5	
15	Gold Star	19.5			36	Forster's Group	7.7	
16	Grupo Schincariol	19.1			37	Suntory	7.5	
17	Chongqing Beer	18.1			38	Bitburger Braugruppe	7.5	
18	Polar	18.0			39	Lion	6.7	
19	San Miguel Corp.	17.2			40	Sapporo	6.5	
20	Petropolis	14.1			1 to 40		1,572.1	81.7%
1 to 20		1,372.8	71.3%		World beer production 2011		1,925.2	100%

2. The situation on the global hop market

2.1. Extremes of the hop market

The hop market has swung from one extreme to the other

- Not since 1955 has planted acreage worldwide been as low as in 2011 but, then again, never before has the average yield been so high as it was in 2011.

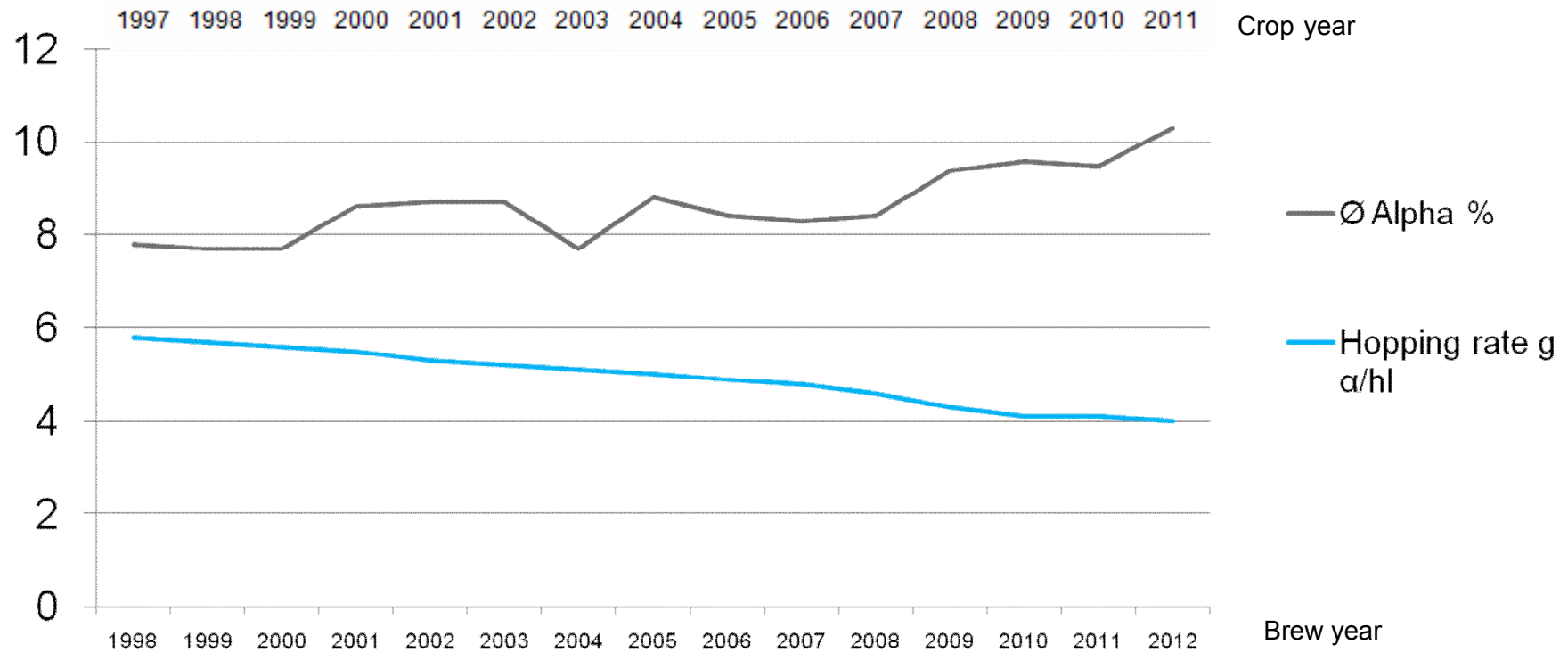


2. The situation on the global hop market

2.1. Extremes of the hop market

The hop market has swung from one extreme to the other

- Moreover, never before has the alpha yield been as high as in 2011, but the hopping rate in beers has never been as low as in year 2012.

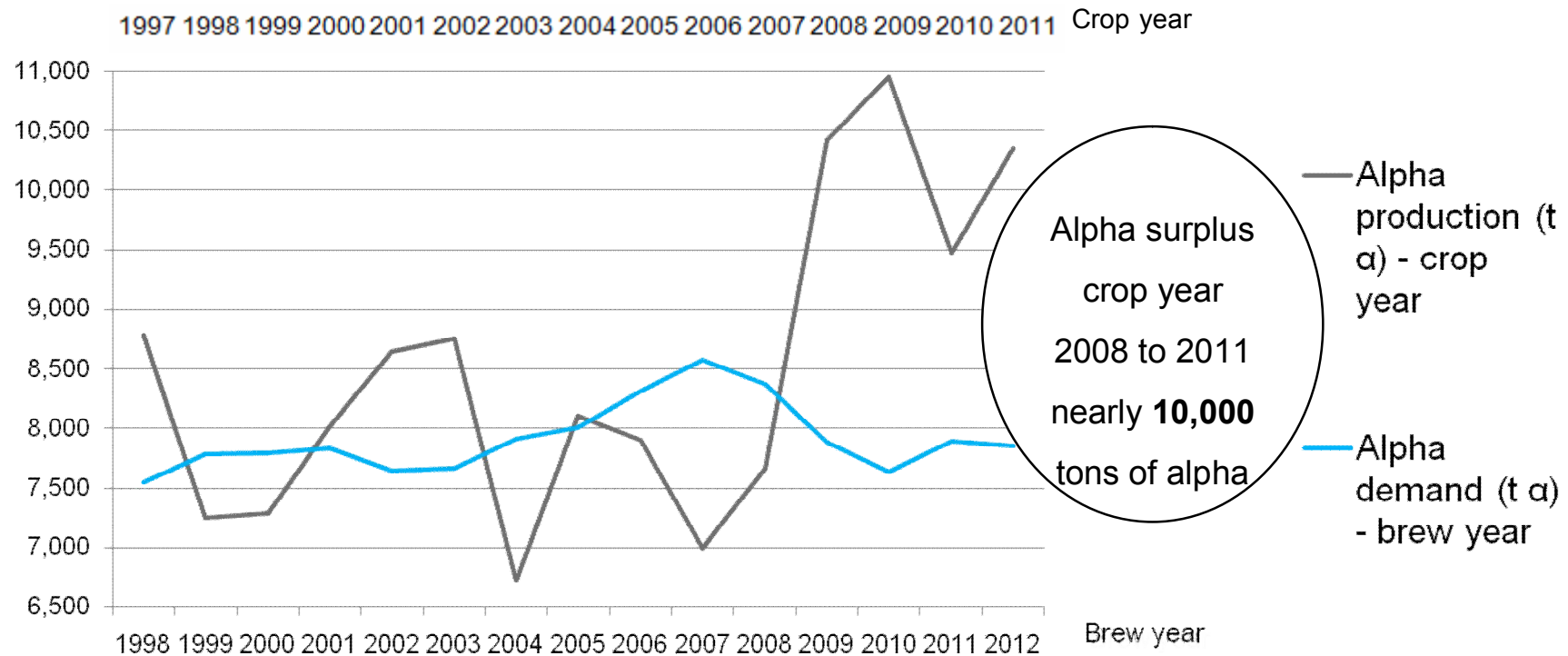


2. The situation on the global hop market

2.1. Extremes of the hop market

The hop market has swung from one extreme to the other

- Never before has the accumulated alpha surplus been so large as recorded in 2011 for brew year 2012, but the hop cultivation will be still more than the brewing industry needs.



2. The situation on the global hop market

2.2. Current key data 2012

Estimation crop year 2012

Acreage change

Germany	- 1,100 ha
Poland	- 200 ha to - 300 ha
Slovenia	- 200 ha to - 300 ha
Czech Republic	- 200 ha
China	- 100 ha
USA	+ 400 ha

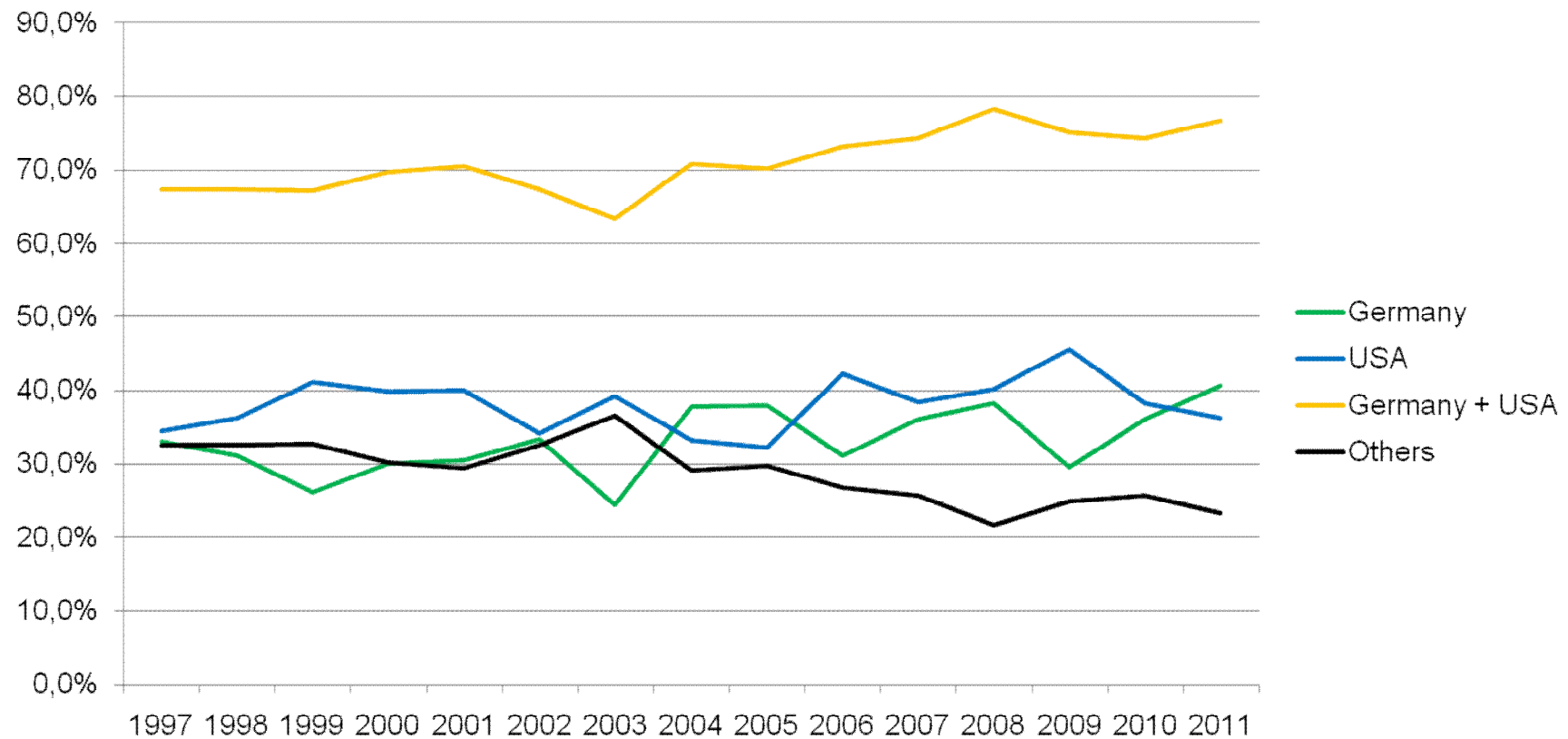
World total

Acreage	46,000 ha to 47,000 ha
Production	90,000 mt to 92,000 mt
Alpha	8,600 mt

2. The situation on the global hop market

2.3. Global leaders of hop cultivation

Global leaders – hop alpha production



3. Flavor hops

A new category of hops

FLAVORHOPS

- A new category of hops
- Varieties with particularly fruity notes
- They bear names such as Citra, Palisade, Simcoe, Summer, Topaz or Mandarina Bavaria
 - Flavor hops could be an aroma variety or a bitter/high alpha variety
- With Flavor hops brewers could create unusual and differentiated beers

The situation on the global beer market and hop market



**THANK YOU FOR
YOUR ATTENTION**