



Global and China Beer Industry Report, 2012-2014

Jan. 2013

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include China Customs, and National Bureau of Statistics of China etc.

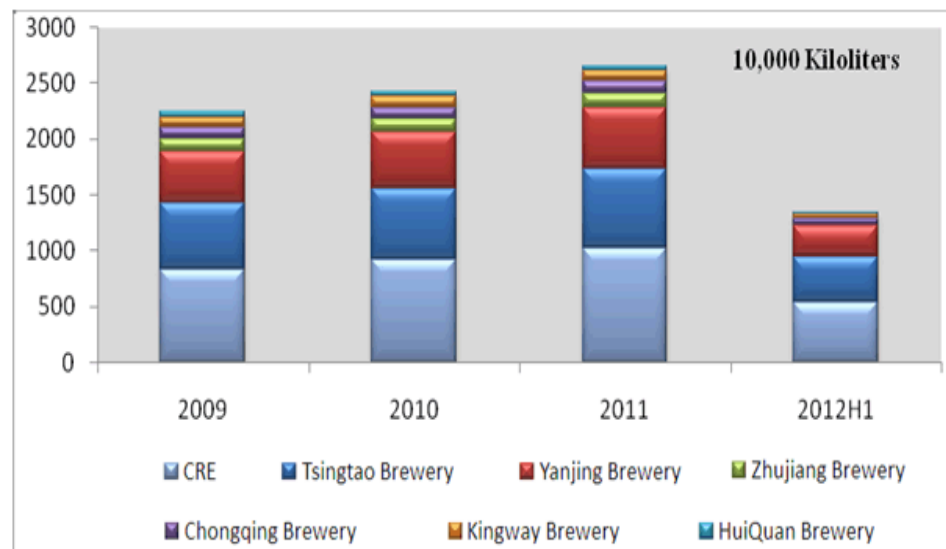
Abstract

In recent years, the global beer production and sales have maintained continuous growth. Total production in 2011 reached 192.7 million kiloliters, a year-on-year rise of 3.82%; China, the United States, Brazil, Russia and Germany as the world's top five largest beer-producing countries together accounted for 54% of the global beer production. Following the acceleration of cross-border mergers and acquisitions in the beer industry (e.g. Anheuser-Busch InBev wholly owns China's Harbin Brewery; SABMiller holds a 49% stake in China Resources Snow Breweries; Carlsberg acquires a 29.71% stake in China's Chongqing Brewery, etc.), international beer companies have witnessed an increasing concentration ratio; currently, Anheuser-Busch InBev, SABMiller, Heineken and Carlsberg occupy a total of 46% market share.

As the world's largest beer producer and consumer, in 2011 China realized beer production and sales volume of 48.989 million kiloliters and 48.557 million kiloliters, respectively, of which, the former accounted for 25.42% worldwide. At present, China's beer market is mainly distributed in East, Central, South and Northeast regions, whose aggregate output held 76.5% of the national total in 2011.

In 2011, China Resources Enterprise, Limited (CRE), Tsingtao Brewery Co.,Ltd. and Yanjing Beer Group Corporation as the leading beer brewers in China accounted for a total of 48.1% market share nationwide; wherein, CRE ranked first in beer sales volume by reaching 10.235 million kiloliters.

China's Beer Sales Volume (by Company), 2009-2012



Source: CRE, Tsingtao Brewery, Yanjing Brewery, Zhujiang Brewery, Chongqing Brewery, Kingway Brewery, HuiQuan Brewery, ResearchInChina *Global and China Beer Industry Report, 2012-2014*

In addition to actively intensifying brand propaganda, major Chinese beer brewers have also expanded capacity by way of new construction, mergers & acquisitions or construction expansion. Tsingtao Brewery, for instance, realized new capacity of 2.1 million kiloliters in 2011 by means of acquiring Hangzhou Xin'an River Brewery Co., Ltd. and Shaoguan Vigour Brewery Co., Ltd., expanding Suqian Brewery, etc.; in 2012, the new construction project of Guangdong Jieyang Brewery, expansion projects of Yangzhou Brewery and Weiwu Brewery were completed and put into production; moreover, Tsingtao Brewery's first overseas base "Tsingtao Brewery (Thailand) Co., Ltd." plans to be completed and put into operation at the end of 2013.

Global and China Beer Industry Report, 2012-2014 of ResearchInChina mainly covers the followings:

- Supply and demand, regional distribution, competitive landscape, development trend, etc. of global beer industry;
- supply and demand, regional distribution, import and export, competitive landscape, development trend, etc. of China beer industry.
- Operation, beer business analysis and development, etc. of 15 international and Chinese beer enterprises.

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