



InBev Belgium: AB InBev in Belgium

2012



AB InBev worldwide, in Benelux & France

Cost-Connect-Win

Best Beer Company in a Better World

AB InBev worldwide

- AB InBev is the nr 1 beer company in the world
- One of the top 5 companies amongst the FMCG worldwide
- Position N°1 or N°2 in 19 markets
- Global, Western-Europe, BeNeFraLux headquarters & GITEC: Leuven
- 4 out of the 10 best-selling beer brands around the world
- Activities in 23 countries
- Our beer is sold in more than 100 countries
- +/- 116.000 employees in the world



AB InBev in Belgium

- AB InBev is market leader in Belgium (market share 56,3 %)
- Global headquarters in Leuven
- 2.800 employees in Belgium
- 4 breweries: Leuven, Jupille, Hoegaarden, Belle-Vue
- 5 top brands: Jupiler, Stella Artois, Leffe, Hoegaarden and Belle-Vue
- Top 3 of Belgian brands:



AB InBev portfolio - 200+ brands

Important presence of Belgian beers around the world



Worldwide brands
3 strong global brands



Multi-country brands
Distributed in many countries around the world (e.g. Hoegaarden and Leffe available in > 60 countries)



“Local champions”



AB InBev in Benelux and France

- 7 AB InBev breweries



Louvain



Sint-Pieters-
Leeuw



Hoegaarden



Jupille



Diekirch



Arcen



Dommelen

- 2011 volume: +/- 10 million hl
- Split on- and off-trade: 46 % / 54 %
- Client base: 2/3 horeca – 1/3 retail
- +/- 3.500 employees
- Market leader in Belgium and Luxembourg; N°2 in The Netherlands and N°3 in France

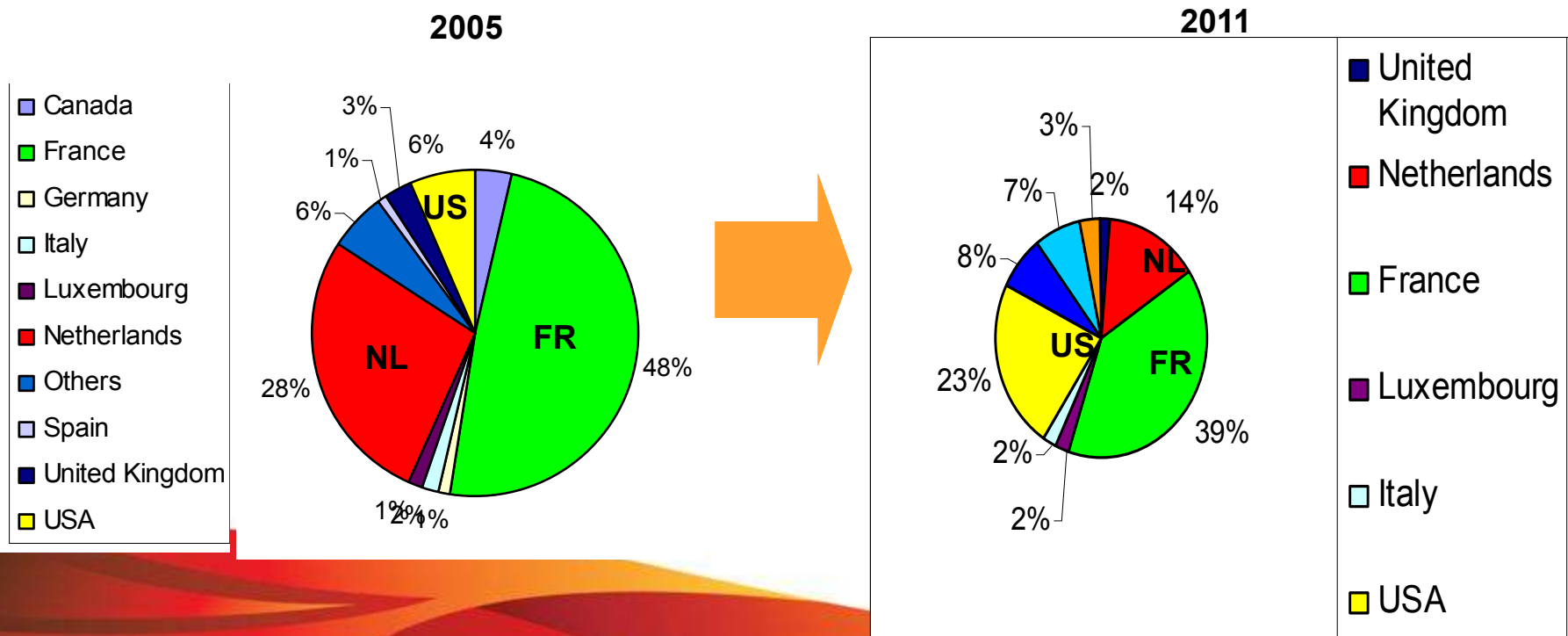


AB InBev in Benelux and France



Export from Belgium

- Our most important export destination from BELGIUM: **Netherlands, France & Luxemburg**
=> Organisation base of BeNeFraLux = same brands = synergies
- Export from Belgium to **American market**
- => From 6 % in 2005 to second place with 23 % in 2011 (*Stella Artois +24 %; Leffe +50 %*)
=> Markets in North America characterized by high expectations in terms of quality and supplying reliability



From the largest micro-brewery
in the world. Belgium.



She is a thing of beauty

Beer market in BeNeFraLux



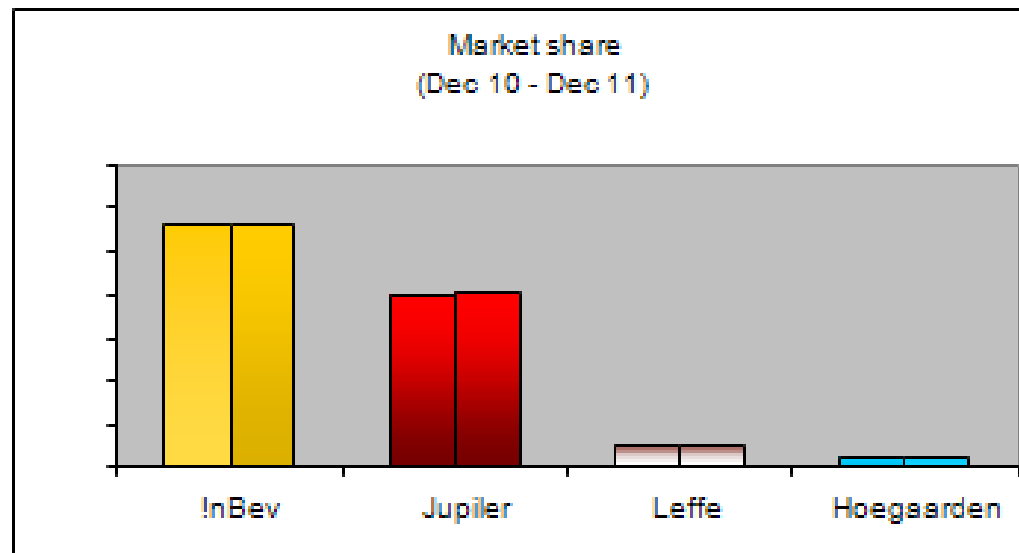
	BE	NL	FR	LUX	BNFL
Number inhabitants (mio)	10.6	16.5	65.4	0.5	93.0
Per capita per country (in ltr)	80	73	27	82	39
Beer volume per country (mio hl)	8.6	10.5	17.3	0.4	36.8
Industry evolution 11 vs 10	1.6%	-1.1%	-0.3%	-2.2%	-0.1%
AB InBev marketshare 2011 (weighted)	56.3%	17.1%	11.3%	46.7%	23.6%
Split On/Off Trade (industry)	46/54	27/73	26/74	49/51	32/68
Split On/Off Trade (AB InBev)	44/56	43/57	46/54	46/55	46/54



Market and market share evolution in 2011



- Market +1,6 % vs 2010
- InBev Belgium's market share: 56,3%
- Jupiler and Leffe's market share continue to grow
- Hoegaarden's market share remains roughly stable





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Strategic Model: Cost-Connect-Win



The consumer is the boss



CONNECT: INVESTMENTS

SALES & MARKETING

Starting point: **LISTEN to CONSUMERS:**

Consumer study

- focus groups
- consumer panels

CLIENTS :

- * Measure client satisfaction
- * Round tables with retail and 'horeca' partners
- * "Feet on the Street" in pubs and retail
- * Regular management visits
- * Top-to-top discussions



ABInBev

CONNECT: INVESTMENTS

SALES & MARKETING



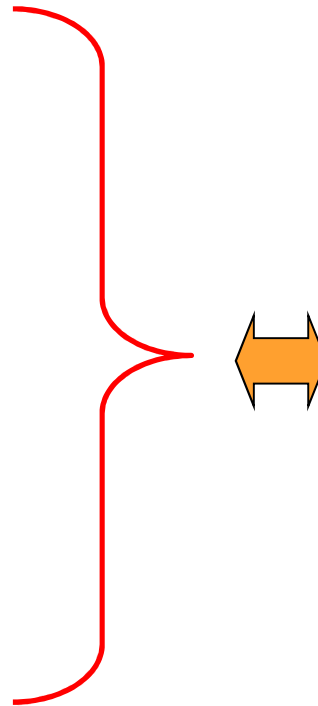
What do we learn from our clients and our consumers?

CONSUMERS – expectations:

- New taste experience
- Convenience (pack types)
- New drinking moments
- Brand experience

CLIENTS – expectations:

- Professional support
- Strong promotions
- Category management
- Strong brands / “traffic builders”



**All this leads to
INNOVATION in the
broad sense**



Tradition & innovation, basis of growth and development on a mature market

14 innovations in 5 years



Important contribution to the strengthening of AB InBev brands and to market positioning in Belgium





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Cost-Connect-Win

Best Beer Company in a Better World

Our dream: To be the Best Beer Company in a Better World



Best Beer Company
in a **Better** World

3 pillars Better World:

- Promotion of **responsible drinking**
- Promotion of sustainable **environment** practices
- Positive impact on the **community**



Better World in our breweries



Best Beer Company
in a Better World

- Thermal Power Plant Leuven (20 mio € investment)



- 3 x less emissions
- Reduction energy use by 5 – 10%
- Water savings of 15%

- Bottle Washer Jupille (3 mio € investment)



- Optimal use and re-use of water
- 5% less energy
- Water savings of 18%



Better World initiatives

- World Environment Day
- Global Be(er) Responsible Day
- Family Talk
- BOB-campaign
- Respect16
- Poverello...



Best Beer Company
in a Better World

