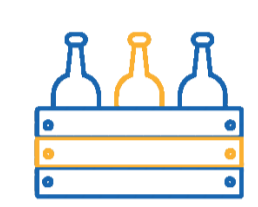


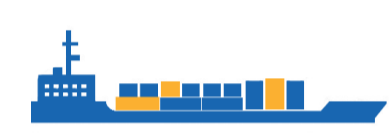
Facts at a glance



There are now around **7,500** breweries in the EU, double the number in 2010 and with over 1500 breweries opening since 2013



Over the 20 years between 1993 to 2012, the trading ties of EU28 countries extend to **123** countries outside of the EU.



Between 1993 and 2012, a total of **830 million** hectoliters of beer, with an equivalent value of about **80 billion** US dollars, was traded around the world excluding intra-EU trade. Trading between the world and EU28 accounted for **40%** thereof representing around **330 million** hectoliters, or **30 billion** US dollars



Annual traded quantity around the world has more than **tripled** in 20 years, from 17 million hectoliters in 1993 to close to 70 million hectoliters in 2012, with an average annual growth of **8%**.

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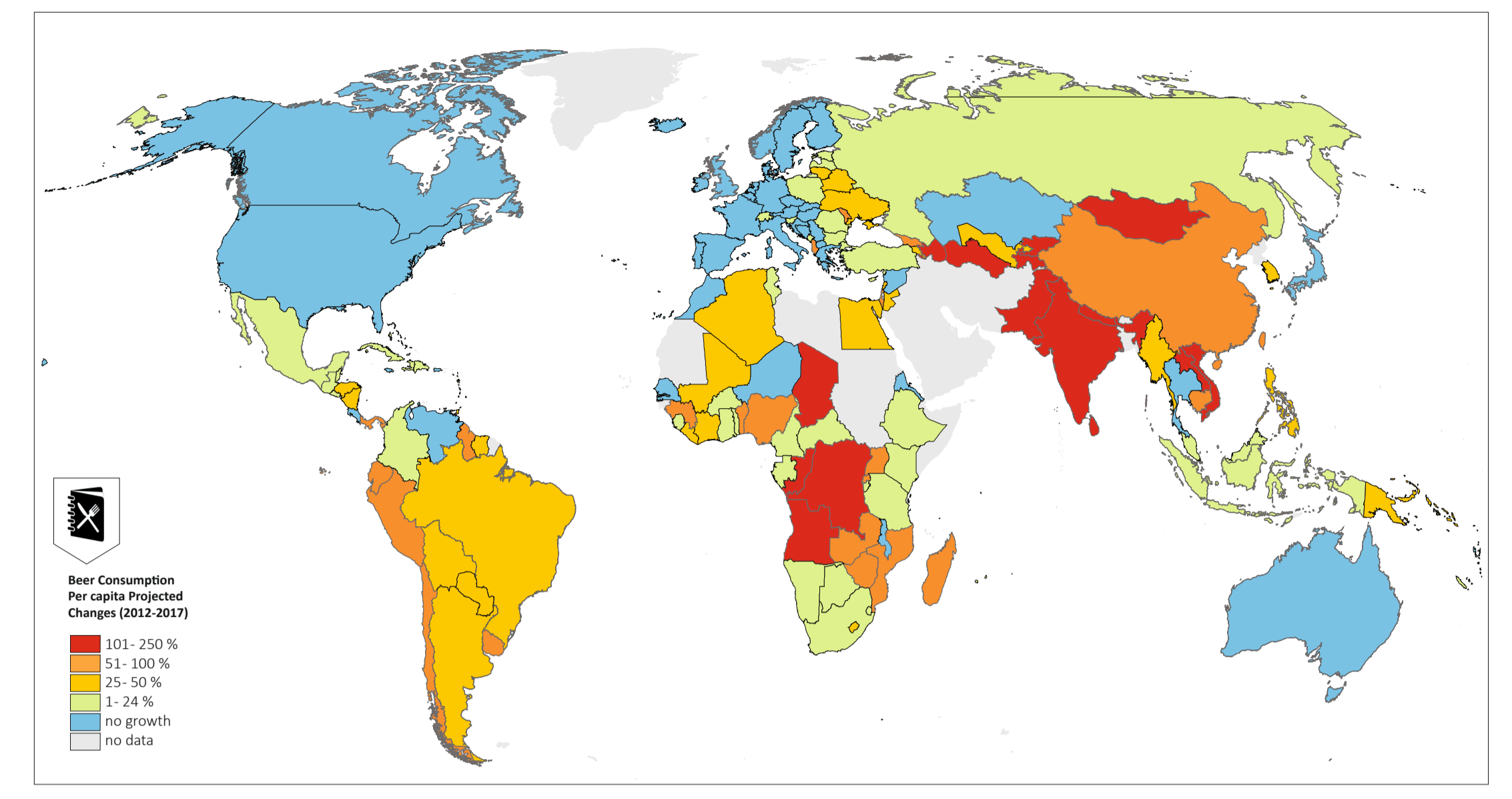
Beer Connects Europe with the World

Global Significance of Trade and Investment by the EU Brewing Sector (1993 – 2012)

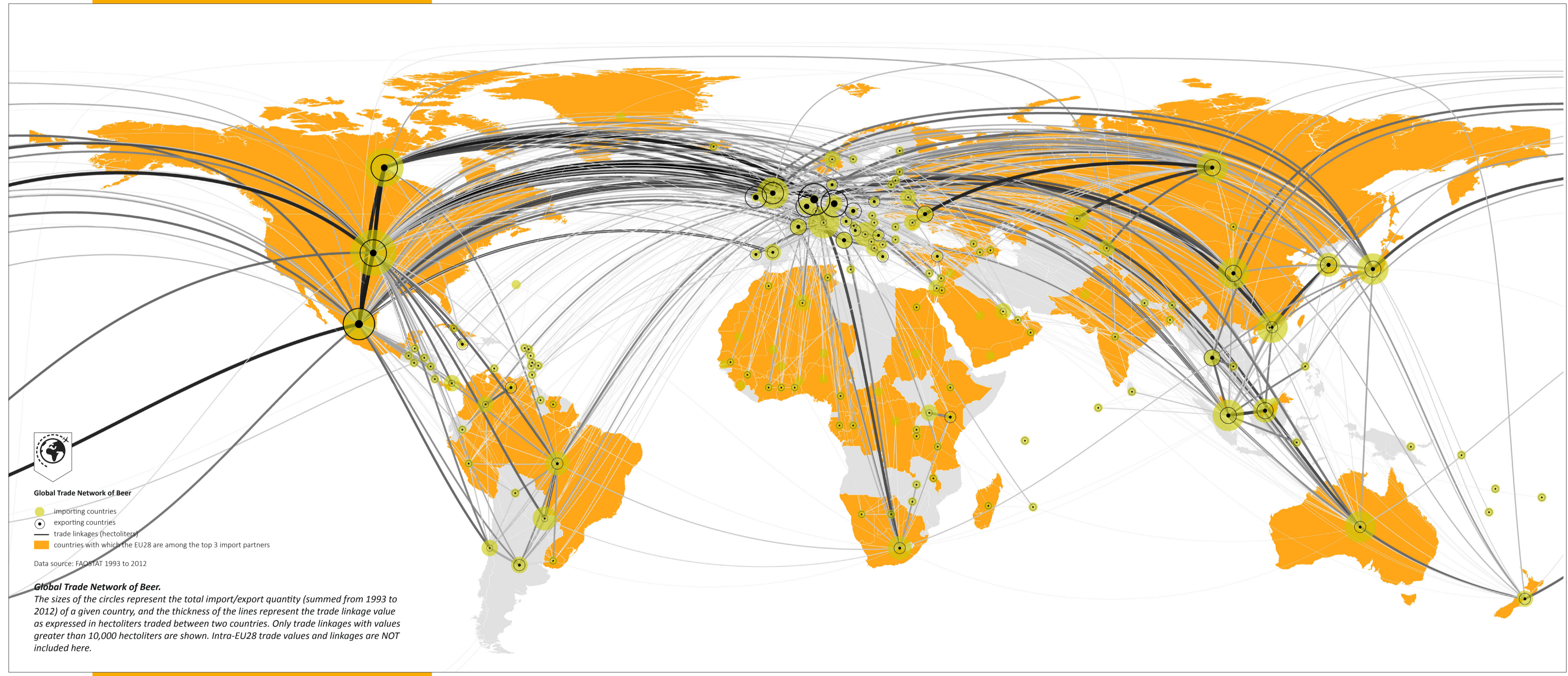
Beer Connects Europe with the World

The EU is home to around 7500 breweries and boasts a history of brewing culture and heritage that dates back thousands of years. The EU is also home to the headquarters of the world's largest brewing companies.

Over the 20 years between 1993 to 2012, the trading ties of EU28 members have grown to 123 countries outside of EU. Furthermore, the EU countries are among the top three import partners of no less than 97 countries outside of the EU.



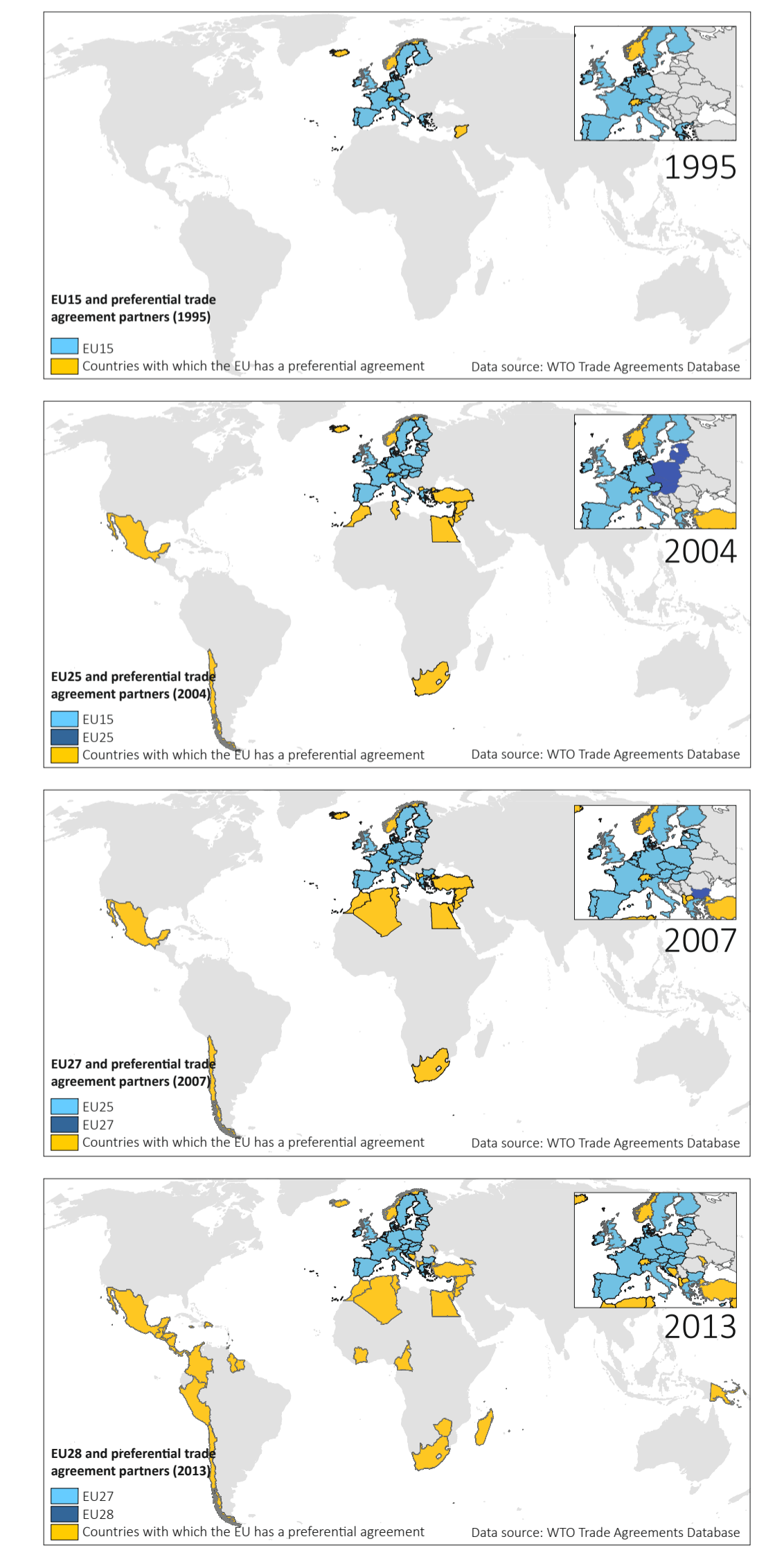
Beer Consumption Trends. With the still huge and growing demand in third countries both for investment and trade, there is untapped potential for sustained growth of the European brewing sector. (Data Source: Brewers of Europe 2012)



The trading ties of EU28 members extend to **123** countries outside of the EU and EU28 countries are among the **top 3** import partners for **97** of these countries.

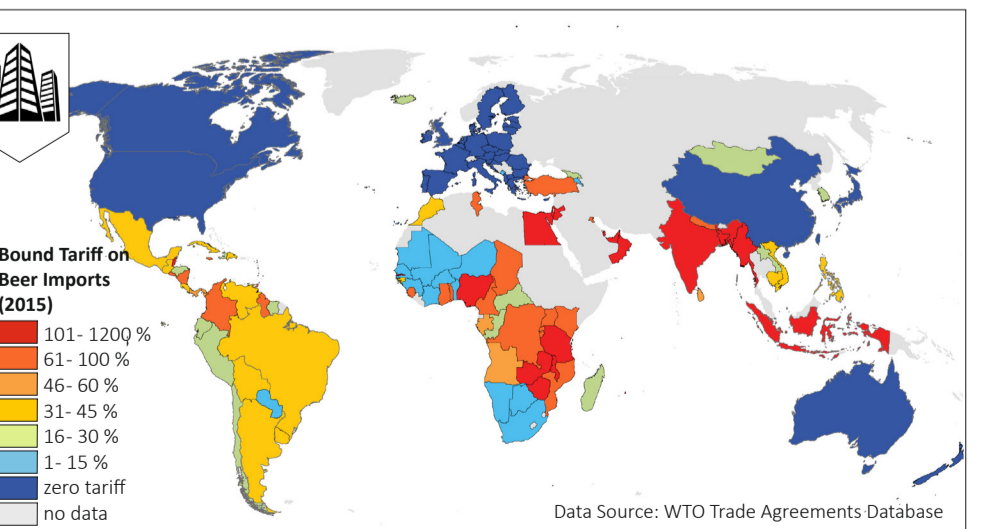
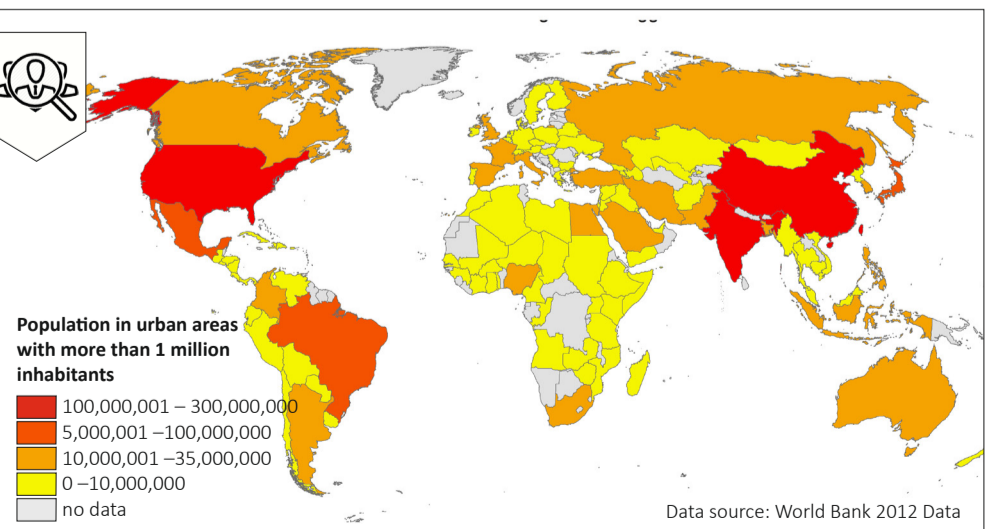
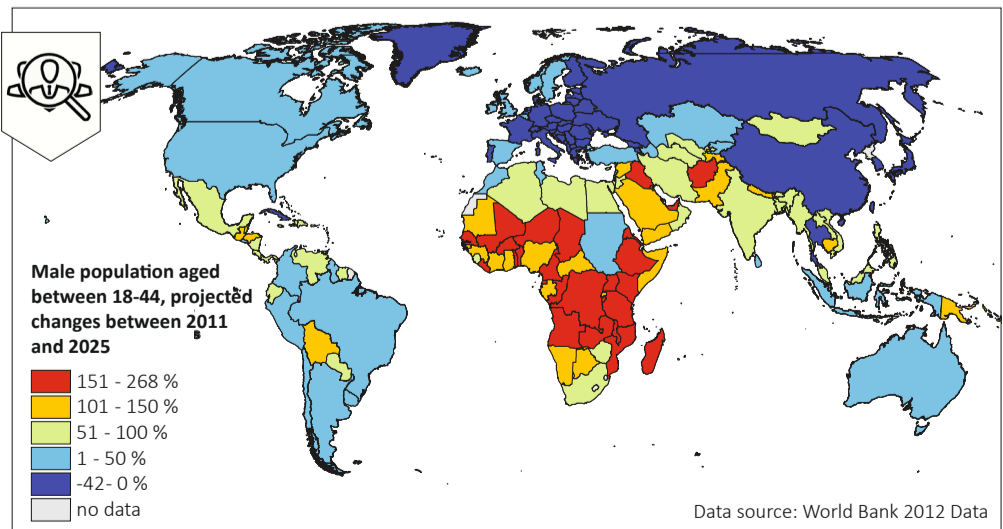
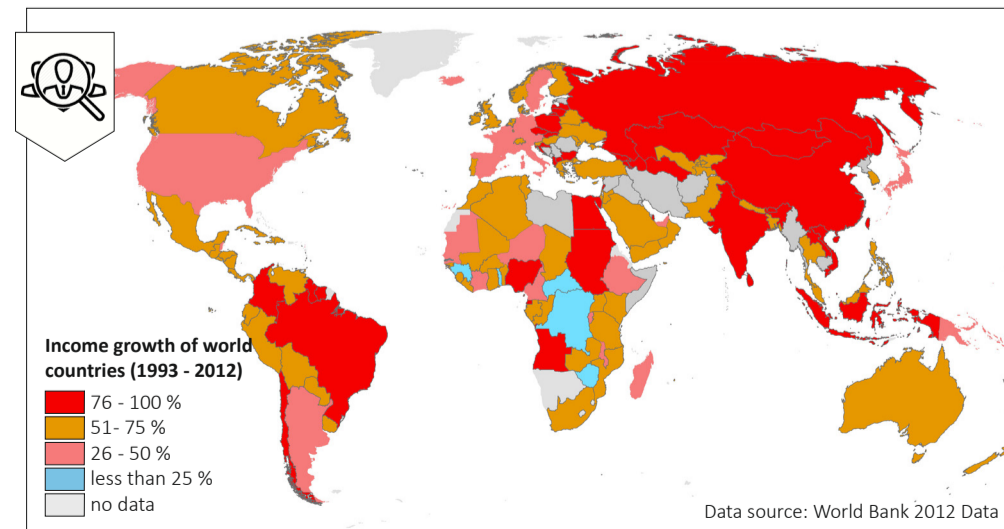
EU Expansion & International Trade Policy

EU expansion over the last two decades has created one of the biggest economies and trading entities in the world. EU trade policy matters not only to the EU, but also to the world. With the growing importance of regional trade blocks such as ASEAN and NAFTA, EU has sustained efforts in developing regional and bilateral preferential trade partners.



Global Dynamics

Over recent decades, there have been major changes in beer consumption around the world. The important global dynamics that impact on the consumption trends and patterns of beer include income growth, demographics, urbanization, trade, migration and international mobility, foreign investments, and regulatory and other constraints. Driven by the changing global demand, trade has grown substantially in volume and value, which in turn has significant effects on the global beer consumption trends and patterns.



Income Growth of World Countries between 1993 and 2012
(Data Source: World Bank 2012)

Global Demographics. Over the coming decades, Africa will experience the most rapid population growth. By 2050, total population in Africa will double from today adding another 1 billion to the total. China's population will age rapidly over the coming decades while India and the African continent are expected to maintain relatively young populations.

Urbanization and Global Cities. Urbanization and especially the rise of 'global cities' have important implications for business strategy. Metropolitan and cosmopolitan cities are where the trend setting global citizens gather. This means fundamentally different marketing and distribution strategies focusing on premium products targeted at urban centres with more personally appealing marketing channels and distribution channels.

Trade Policy. Preferential trade agreements effectively resulted in the reduction of import tariffs. However, in particular non-tariff barriers remain an important issue especially for small and medium European Union-based brewers that rely on export for international expansions.