



Sample pages from a typical Beer Market Insights Report

Example only – content may vary slightly by market.
Please refer to individual contents lists



Sample pages from a typical Beer Market Insights Report

EXECUTIVE SUMMARY

Text



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MARKET CONTEXT

Market Environment

Text

The Consumer Palate

Text

All Commercial Beverages

Text

Legislation and Taxation

Text



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MARKET PARAMETER TABLES

Table 1.1.1 - Population Size and Growth 1982-2012F

YEAR	MILLION	% CHG	% CHG PA
1982			
1983		1982-1983	
1984		1983-1984	
1985		1984-1985	
1986		1985-1986	
1987		1986-1987	1982-1987
1988		1987-1988	
1989		1988-1989	
1990		1989-1990	
1991		1990-1991	
1992		1991-1992	1987-1992
1993		1992-1993	
1994		1993-1994	
1995		1994-1995	
1996		1995-1996	
1997		1996-1997	1992-1997
1998		1997-1998	
1999		1998-1999	
2000		1999-2000	
2001		2000-2001	
2002		2001-2002	1997-2002
2003		2002-2003	
2004		2003-2004	
2005		2004-2005	
2006		2005-2006	
2007		2006-2007	2002-2007
2008		2007-2008	
2009		2008-2009	
2010		2009-2010	
2011F		2010-2011F	
2012F		2011F-2012F	2002-2012F
SOURCE : IHSGlobal Insight (IHSGI); Canadean			



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Table 1.1.2 - East Europe Population Size and Growth 2001-2011F

Slovenia	THOUSANDS			% OF TOTAL			% CHG PA		
	2001	2010	2011F	2001	2010	2011F	01-11F	01-10	10-11F
Belarus									
Bosnia-Herzegovina									
Bulgaria									
Croatia									
Czech Republic									
Estonia									
Hungary									
Latvia									
Lithuania									
Macedonia									
Poland									
Romania									
Russia									
Serbia									
Slovak Republic									
Slovenia									
Turkey									
Ukraine									
East Europe									

SOURCE : IHSGlobal Insight (IHSGI); Canadean

Table 1.2 - Economic Indicators, 2002-2012F

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011F	2012F
Real GDP											
CPI Period Average											
Real Private Consumption											
Exchange Rate – Local Currency v US\$											

SOURCE : IHSGlobal Insight (IHSGI); Canadean

Table 1.3 - Average Monthly Temperatures (Moscow) 2005-2009

Deg C	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
2005												
2006												
2007												
2008												
2009												
Average 2005-2009												

SOURCE : Met Office (UK); Canadean



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Table 1.4.3 - East Europe Beverage Consumption Per Capita - Growth, 2001-2011F

Volume	% CHANGE									
	01-10	06-10	03-04	04-05	05-06	06-07	07-08	08-09	09-10	10-11F
All Commercial Beverages [1]										
Soft Drinks [2]										
Dairy Drinks										
Hot Beverages										
Coffee										
Tea										
Alcoholic Drinks										
Beer										
Cider										
Wine										
Spirits										
Fortified Wine										
FABs (inc Coolers)										
Population (Million)										
SOURCE : Trade Interviews; Canadean										



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Table 1.5.3 - Legal Controls on Beer

Table 1.5.3 - Legal Controls on Beer	
Retail Advertising	Text
Spirits Advertising	Text
Alcohol Advertising Allowed on TV	Text
Alcohol Advertising Allowed on Radio	Text
Alcohol Advertising Allowed in Cinemas	Text
Alcohol Advertising Allowed on Posters	Text
Alcohol Advertising Allowed in Print Media	Text
SOURCE : Canadean	

Table 1.5.4 - Tax Burden on Beer @ 5% Abv, 2010

	RUB/litre	% Average Retail Price
Average Price per Litre		
Excise Duty		
VAT		
Total Tax Burden		
SOURCE : Canadean		



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MARKET BACKGROUND BRIEFING

Text

Beer Definitions by Type - Local Segmentation

SEGMENT	STRENGTH
PALE	
DARK	
WHEAT	
RED	
COMMODITY BRANDS	
SOURCE: Canadean	

Beer Definitions by Type - Standard Price Segmentation

Text	
SEGMENT	TYPE/BRANDS
DISCOUNT	
MAINSTREAM	
PREMIUM	
SUPERPREMIUM	
SOURCE : Canadean	

Beer Definitions by Type - Alcoholic Strength

Text	
NO ALCOHOL	
LOW ALCOHOL	
STANDARD	
STRONG BEER	
SOURCE: Canadean	



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Beer Definitions by Type - Speciality Beer

Text

ALE

Text

STOUT

Text

WHEAT BEER

Text

OTHER TOP FERMENTED BEERS

Text

FLAVOURED BEER

Text

BEERMIXES

Text

OTHER SPECIALITIES

Text

SOURCE: Canadean

Beer Definitions by Type - Local, National and International

Text

LOCAL

Text

NATIONAL

Text

INTERNATIONAL

Text

SOURCE: Canadean



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MARKET UPDATE

Beer Key Facts

Market Size	000 HL	Litres Per Capita		
Consumption 2010				
Growth	CAGR% 05-10	CAGR% 07-10	CAGR% 09-10	
Consumption M Litres				
Market Value	RUB Million	RUB / Litre	US\$ Million	US\$ / Litre
Value (at consumer price)				
Segmentation 2010	Discount	Mainstream	Premium	Superpremium
% Share				
Distribution 2010	Off-Premise	On-Premise		
% Share				
Packaging 2010	Draught	PET	Glass	Metal
% Share				

SOURCE: Trade Interviews; Canadean Wisdom



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MARKET COMMENTARY

Current and Emerging Trends

Text

Outlook

Text

Imports and Exports

Text

Segmentation

Text



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Brand Analysis

Text

Private Label/Private Label Producers

Text

New Products Activity

Text



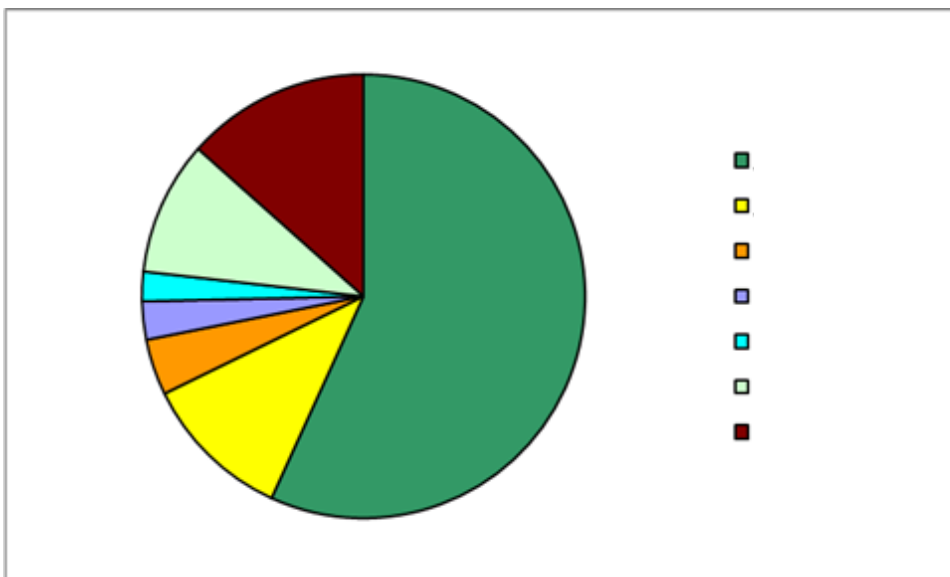
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INDUSTRY STRUCTURE

Text

Chart – Leading Brewers/Importers, 2010 (example only)

Text



Source : Canadean Wisdom

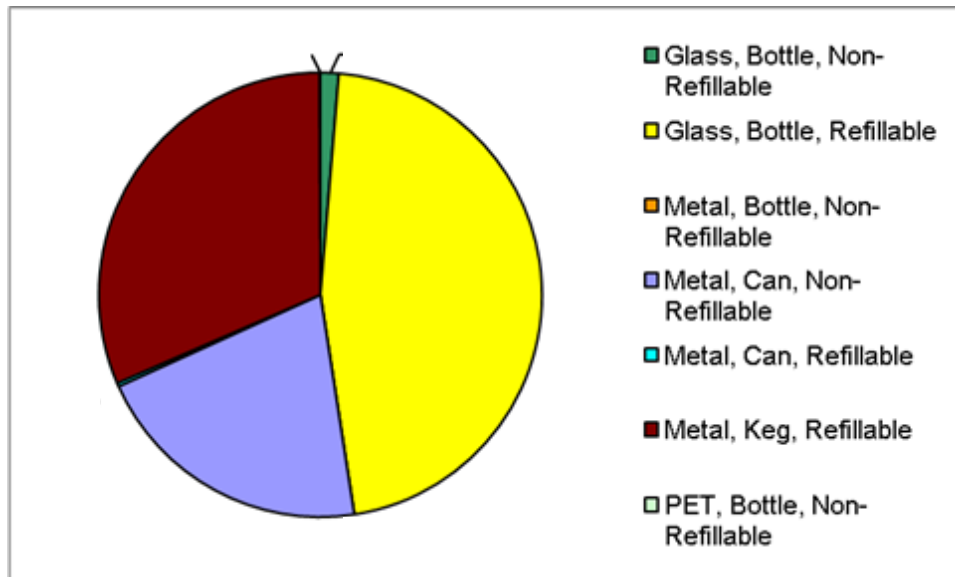
Brewers

Text



PACKAGING

Chart – Beer Consumption by Pack Material/Type, 2010 (example only)



Source : Canadean Wisdom

Packaging Trends

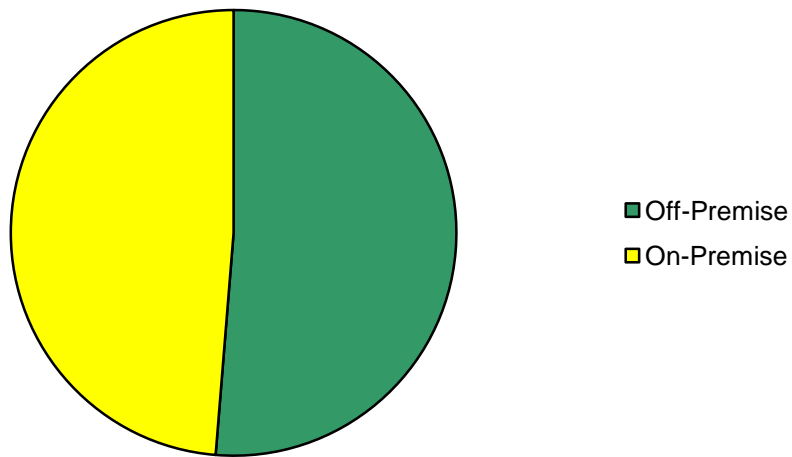
Text



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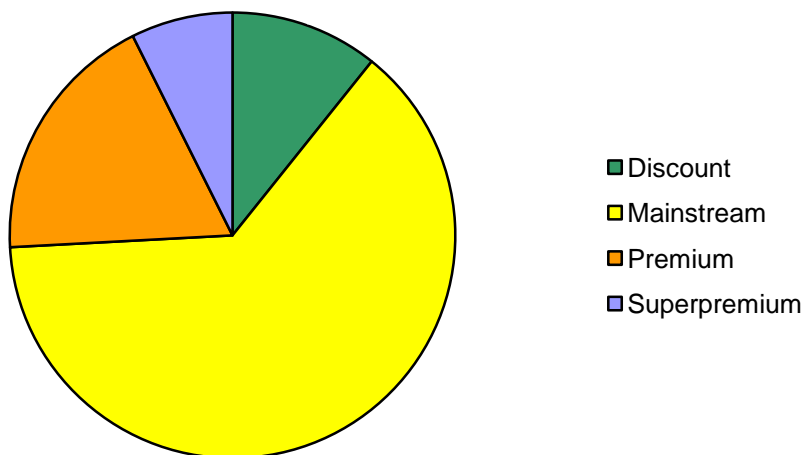
CHANNEL ANALYSIS

Chart – Beer Distribution by Channel, 2010 (example only)



Source : Canadean Wisdom

Chart – Beer Consumption by Price Segment, 2010 (example only)



Source : Canadean Wisdom



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Marketing Valuation & Pricing

Beer Market Valuation (Local Currency), 2009-2011F

	000 HL			Average Price/Litre			Value (Russian Ruble)		
	2009	2010	2011F	2009	2010	2011F	2009	2010	2011F
Total									
Total Mainstream									
- Off									
- On									
Total Premium									
- Off									
- On									
Total Discount									
- Off									
- On									
Total Superpremium									
- Off									
- On									

SOURCE: Trade Interviews, Canadean

Text

Distribution Trends

Text



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DISTRIBUTION AND PRICING TABLES

Table 3.4.1 - Outlet Universe For Beer - Number/% Share, 2006-2010

TYPE OF OUTLET	NUMBER OF OUTLETS					% SHARE				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
OFF-PREMISE										
HYPERMARKETS										
SUPERMARKETS										
SUPERETTES										
HARD DISCOUNTERS										
OTHERS										
ON-PREMISE										
CAFES- TOBACCO										
OTHER BARS/DRINKING PLACES										
TRADITIONAL EATING PLACES										
FAST FOOD SERVICE										
SOURCE : Trade Statistics; Canadean										

Table 3.4.2 - Outlet Universe For Beer by Turnover - Number/% Share, 2006-2010

TYPE OF OUTLET	VALUE (RUB BILLION)					% SHARE				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
OFF-PREMISE										
HYPERMARKETS										
SUPERMARKETS										
SUPERETTES										
HARD DISCOUNTERS										
OTHERS										
ON-PREMISE										
CAFES- TOBACCO										
OTHER BARS/DRINKING PLACES										
TRADITIONAL EATING PLACES										
FAST FOOD SERVICE										
SOURCE : Trade Statistics; Canadean										



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Table 3.10.2 - Selected Consumer Beer Prices: On-Premise, 2009-2011

PACK TYPE/SIZE (CL)	BRAND	PRICE PER UNIT (RUB)			PRICE PER LITRE (RUB)		
		2009	2010	2011	2009	2010	2011
DRAUGHT	50						
	50						
	100						
RB GLASS	50						
SUPERPREMIUM							
DRAUGHT	50						
	50						
	100						
NR GLASS	50						
	50						
Note: Brands are attributed to price segments based on the main pack formats and sizes and therefore prices of brands in certain pack formats may appear to create overlap between the segments							
SOURCE : Canadean							

DATA TABLES

Commercial Beverage Consumption - per Capita - Litres, 2000-2011F

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011F
Total												
Total Hot Beverages												
- Hot Tea												
- Hot Coffee												
Total Alcoholic Drinks												
- Beer												
- Spirits excluding FABs & Fort Wine												
- Flavoured Alcoholic Beverages												
- Wine Total												
- Fortified Wine												
Total Soft Drinks												
- Soft Drinks												
Total Dairy Drinks												
- Dairy Drinks												

SOURCE: Trade Interviews, Canadean



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Commercial Beverage Consumption - per Capita - % Share, 2000-2011F

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011F
Total												
Total Hot Beverages												
- Hot Tea												
- Hot Coffee												
Total Alcoholic Drinks												
- Beer												
- Spirits excluding FABs & Fort Wine												
- Flavoured Alcoholic Beverages												
- Wine Total												
- Fortified Wine												
Total Soft Drinks												
- Soft Drinks												
Total Dairy Drinks												
- Dairy Drinks												

SOURCE: Trade Interviews, Canadean

Commercial Beverage Consumption - per Capita - Growth, 2000-2011F

	00-01	01-02	02-03	03-04	04-05	05-06	06-07	07-08	08-09	09-10	10-11
Total											
Total Soft Drinks											
- Soft Drinks											
Total Dairy Drinks											
- Dairy Drinks											
Total Hot Beverages											
- Hot Coffee											
- Hot Tea											
Total Alcoholic Drinks											
- Wine Total											
- Flavoured Alcoholic Beverages											
- Spirits excluding FABs & Fort Wine											
- Beer											
- Fortified Wine											

SOURCE: Trade Interviews, Canadean



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Commercial Beverage Consumption - Million Litres, 2000-2011F

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011F
Total												
Total Soft Drinks												
- Soft Drinks												
Total Dairy Drinks												
- Dairy Drinks												
Total Hot Beverages												
- Hot Tea												
- Hot Coffee												
Total Alcoholic Drinks												
- Beer												
- Spirits excluding FABs & Fort Wine												
- Flavoured Alcoholic Beverages												
- Wine Total												
- Fortified Wine												

SOURCE: Trade Interviews, Canadean

Alcoholic Beverage Consumption - Litres of Pure Alcohol (LPA) Per Capita, 2000-2011F

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011F
Total Alcoholic Drinks												
- Beer												
- Spirits excluding FABs & Fort Wine												
- Wine Total												
- Fortified Wine												
- Flavoured Alcoholic Beverages												

SOURCE: Trade Interviews, Canadean

Beer Production/Trade/Consumption, 2000-2011F

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011F
Production												
Imports												
Exports												
Consumption												

SOURCE: Trade Interviews, Canadean



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Beer Production/Trade/Consumption - Growth, 2000-2011F

	00-01	01-02	02-03	03-04	04-05	05-06	06-07	07-08	08-09	09-10	10-11F
Production											
Imports											
Exports											
Consumption											

SOURCE: Trade Interviews, Canadean

Consumption of FABs and Cider, 1999-2011F

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011F
Total													
Flavoured Alcoholic Beverages													

SOURCE: Trade Interviews, Canadean

Beer Foreign Trade By Country (Imports), 2007-2011F

	000 HL					% Share				
	2007	2008	2009	2010	2011F	2007	2008	2009	2010	2011F
Total										
Ukraine										
Latvia										
Czech Republic										
Lithuania										
Poland										
Finland										
Germany										
Belgium										
Japan										
China										
Republic of Ireland										
Mexico										
Netherlands										
Armenia										
Kazakhstan										
South Korea										
United Kingdom										
Italy										
Slovak Republic										
Austria										
Belarus										



Sample pages from a typical Beer Market Insights Report

Beer Foreign Trade By Country (Imports), 2007-2011F

	000 HL					% Share				
	2007	2008	2009	2010	2011F	2007	2008	2009	2010	2011F
Others										

SOURCE: Trade Interviews, Canadean

Beer Foreign Trade By Country (Exports), 2007-2011F

	000 HL					% Share				
	2007	2008	2009	2010	2011F	2007	2008	2009	2010	2011F
Total										
Kazakhstan										
Kyrgyzstan										
Moldova										
Ukraine										
Germany										
Mongolia										
Georgia										
Estonia										
Lithuania										
Latvia										
Azerbaijan										
Turkmenistan										
Armenia										
Israel										
United States of America										
Uzbekistan										
Sudan										
Chile										
China										
Finland										
Tajikistan										
Greece										
Denmark										
Kenya										
Belarus										
Poland										
Others										

SOURCE: Trade Interviews, Canadean



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Beer Market Valuation (Local Currency), 2009-2011F

	000 HL			Average Price/Litre			Value (Russian Ruble)		
	2009	2010	2011F	2009	2010	2011F	2009	2010	2011F
Total									
Total Mainstream									
- Off									
- On									
Total Premium									
- Off									
- On									
Total Discount									
- Off									
- On									
Total Superpremium									
- Off									
- On									

SOURCE: Trade Interviews, Canadean

Beer Consumption by Local Definition, 2007-2011F

	000 HL					% Share				
	2007	2008	2009	2010	2011F	2007	2008	2009	2010	2011F
Total										
Brewery-Owned Brands										
Licensed										
Commodity Brands										
Foreign Brands										

SOURCE: Trade Interviews, Canadean

Beer Consumption by Standard Price Segmentation, 2007-2011F

	000 HL					% Share				
	2007	2008	2009	2010	2011F	2007	2008	2009	2010	2011F
Total										
Mainstream										
Premium										
Discount										
Superpremium										

SOURCE: Trade Interviews, Canadean



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Beer Consumption by Alcoholic Strength, 2007-2011F

	000 HL					% Share				
	2007	2008	2009	2010	2011F	2007	2008	2009	2010	2011F
Total										
Regular										
Strong										
No Alcohol										
Low Alcohol										

SOURCE: Trade Interviews, Canadean

Beer Consumption by Type, 2007-2011F

	000 HL					% Share				
	2007	2008	2009	2010	2011F	2007	2008	2009	2010	2011F
Total										
Lager										
Flavoured Beer										
Wheat Beer										
Stout										
Others										
Ale										
Other Top Fermented										
Beer Mixes										

SOURCE: Trade Interviews, Canadean

Beer Consumption by Geographic Scope, 2007-2011F

	000 HL					% Share				
	2007	2008	2009	2010	2011F	2007	2008	2009	2010	2011F
Total										
National										
Local										
International										

SOURCE: Trade Interviews, Canadean



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Beer Consumption by Pack Mix: Refillability/Type/Pack/Size, 2007-2011F

	000 HL					% Share				
	2007	2008	2009	2010	2011F	2007	2008	2009	2010	2011F
Total Beer										
Total Non-Refillable										
- Can										
- Metal										
- 33cl										
- 50cl										
- 100cl										
- 300cl										
- 500cl										
- Bottle										
- PET										
- 50cl										
- 100cl										
- 150cl										
- 200cl										
- 225cl										
- 250cl										
- 500cl										
- Glass										
- 30cl										
- 32cl										
- 33cl										
- 37cl										
- 50cl										
- 56.8cl										
- 66cl										
Total Refillable										
- Bottle										
- Glass										
- 33cl										
- 50cl										
- Keg										
- Metal										
- 5000cl										

SOURCE: Trade Interviews, Canadean



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Beer Distribution: On vs Off Premise, 2007-2011F

	000 HL					% Share				
	2007	2008	2009	2010	2011F	2007	2008	2009	2010	2011F
Total										
Off-Premise										
On-Premise										

SOURCE: Trade Interviews, Canadean