

# Q-pack & PET

Erik Frimout

At the heart of everything we do.....



# Central in the Interbrew's Values: Consumers come first



# Consumers come First



Consumers are at the heart of everything we do.

We uncover and activate superior consumer insights and partner with our customers to build enduring brands.



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# Our consumer looks for convenient packaging ...



## Returnable packaging

Breakable

Once open, always open

Bottle property of brewery

Glass is heavy

Adequate sizing

## One way packaging

Unbreakable

Reclosable

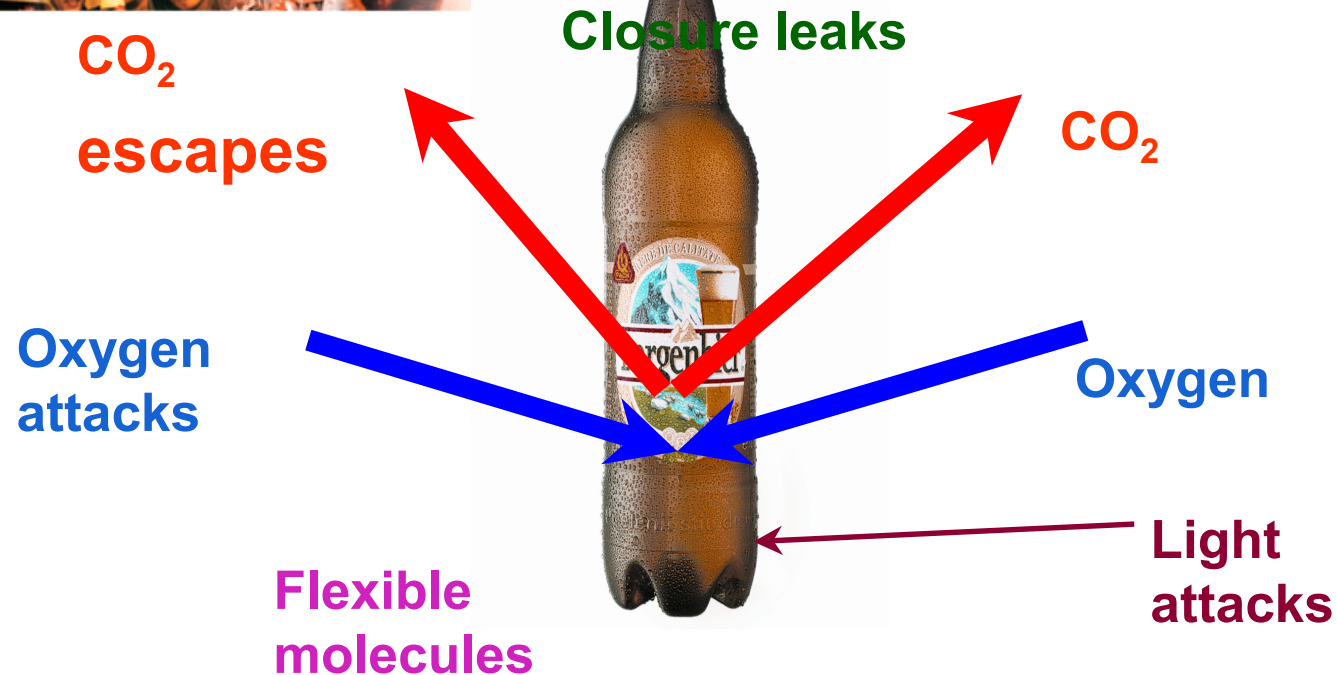
No deposit

Light weight

Fixed sizes

**... provided that taste and quality  
are according expectations**

Normal PET offers needed convenience,  
yet not the desired shelf life.



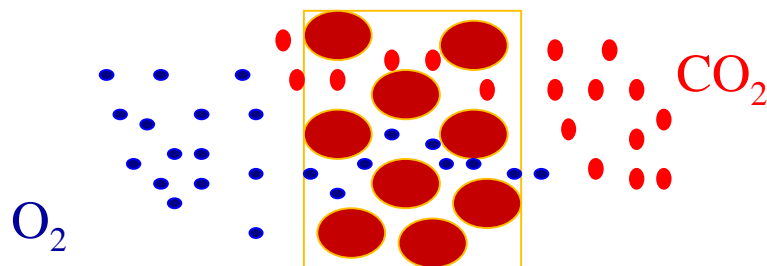
taste changes can appear after 2 weeks  
=> Outflow of CO<sub>2</sub> => less sparkling/fizzyness  
=> Inflow of oxygen => oxydations alters taste

# Monolayer barrier enhanced solution

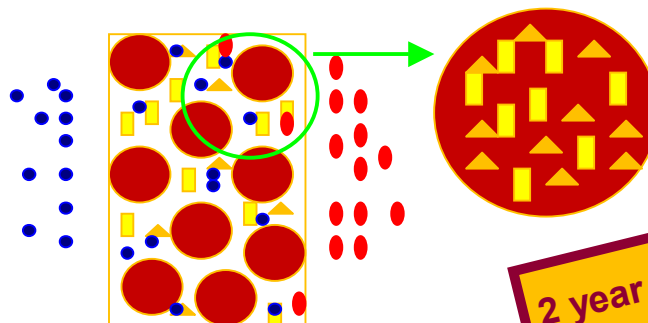


OUTSIDE THE BOTTLE

Normal PET



INSIDE THE BOTTLE

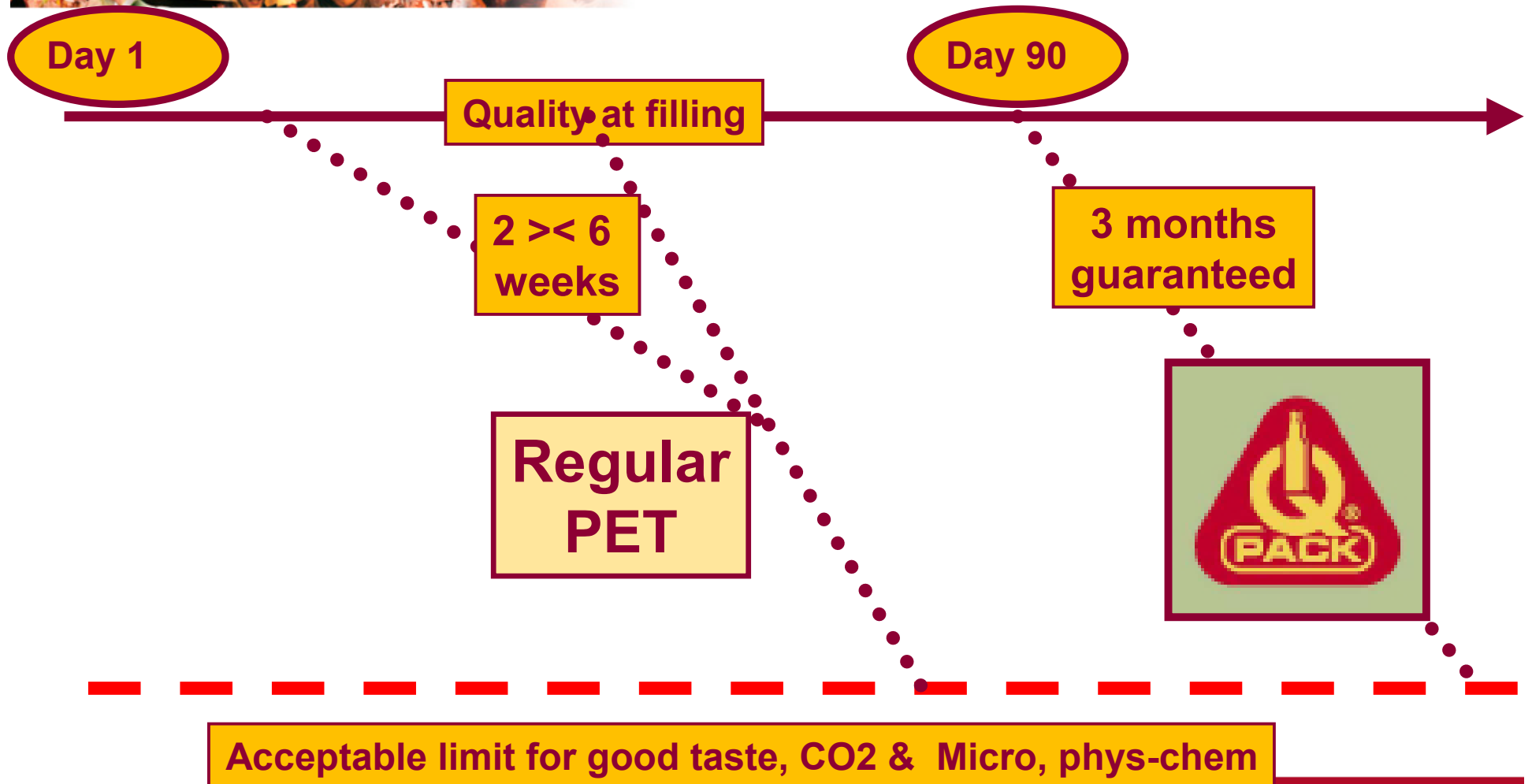


2 year exclusivity  
by country



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# Quality evolution over time





# Customers appreciate PET, yet even more



- One way packaging      => no hassle with empties
- Unbreakable      => less losses
- No deposit      => less capital intensive
- Light weight      => more delivery capacity
- No crates      => higher logistic efficiencies



- ⇒ **Higher margins & profit**
- ⇒ **Longer shelf life**

Consumers pay 20 to 30% more for



than beer bottled in returnable glass.



Full range of adequate sizes in  
1 copyrighted shape



250 ml  
200 ml  
150 ml  
100ml  
75ml  
66ml  
50ml





# Multipacks: full color branding with handle









# Strong POS materials, communicating key benefits



*Shelf-talker*



*Neck-hanger*



*Sticker*



*Wobler*







featured in coolers & racks



LOCAL BREWER®



And on hanging display racks







# Featured on mega displays



# Speed of PET/QPACK development in CE



## PET Segment share of total beermarket:

2001: 0,8% -> 2003: 6,1%

## Increase of sales 2003 vs. 2001:

Segment volume: x8

Interbrew volume: x12

The last 2 years, PET & Qpack sales drove  
75% of the growth of total ITW CE volume



2003 vs. 2001

Total ITW CE volume: + 590.000 HI

Of which PET/Qpack: + 444.000 HI (=75%)

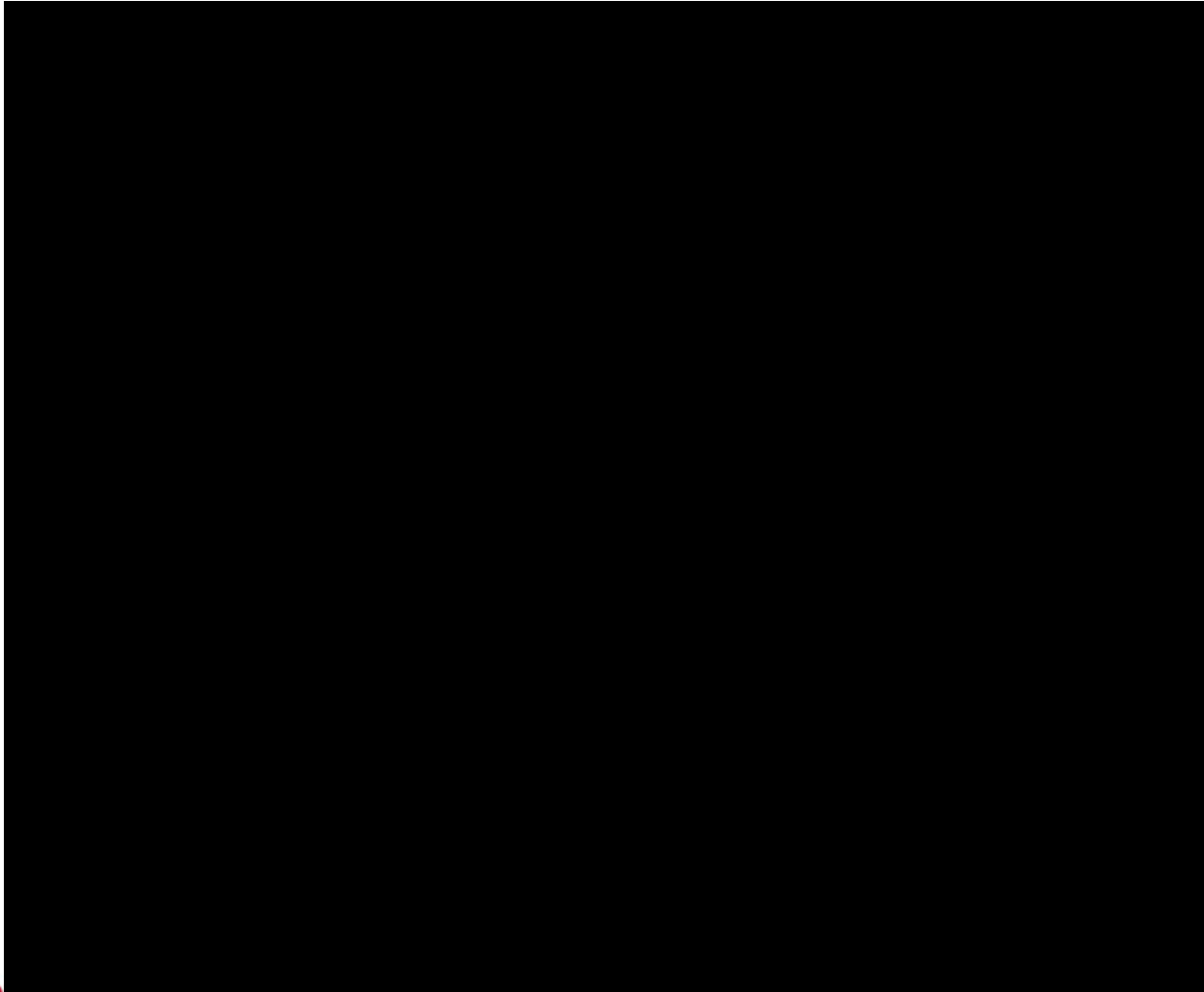
And we are only at the start of a journey valued by our consumers, when comparing with softdrinks



- Adequate sizings
- Specific shapes
- Colours
- Transparency
- Promotional offers
- Multipack's
- Etc.



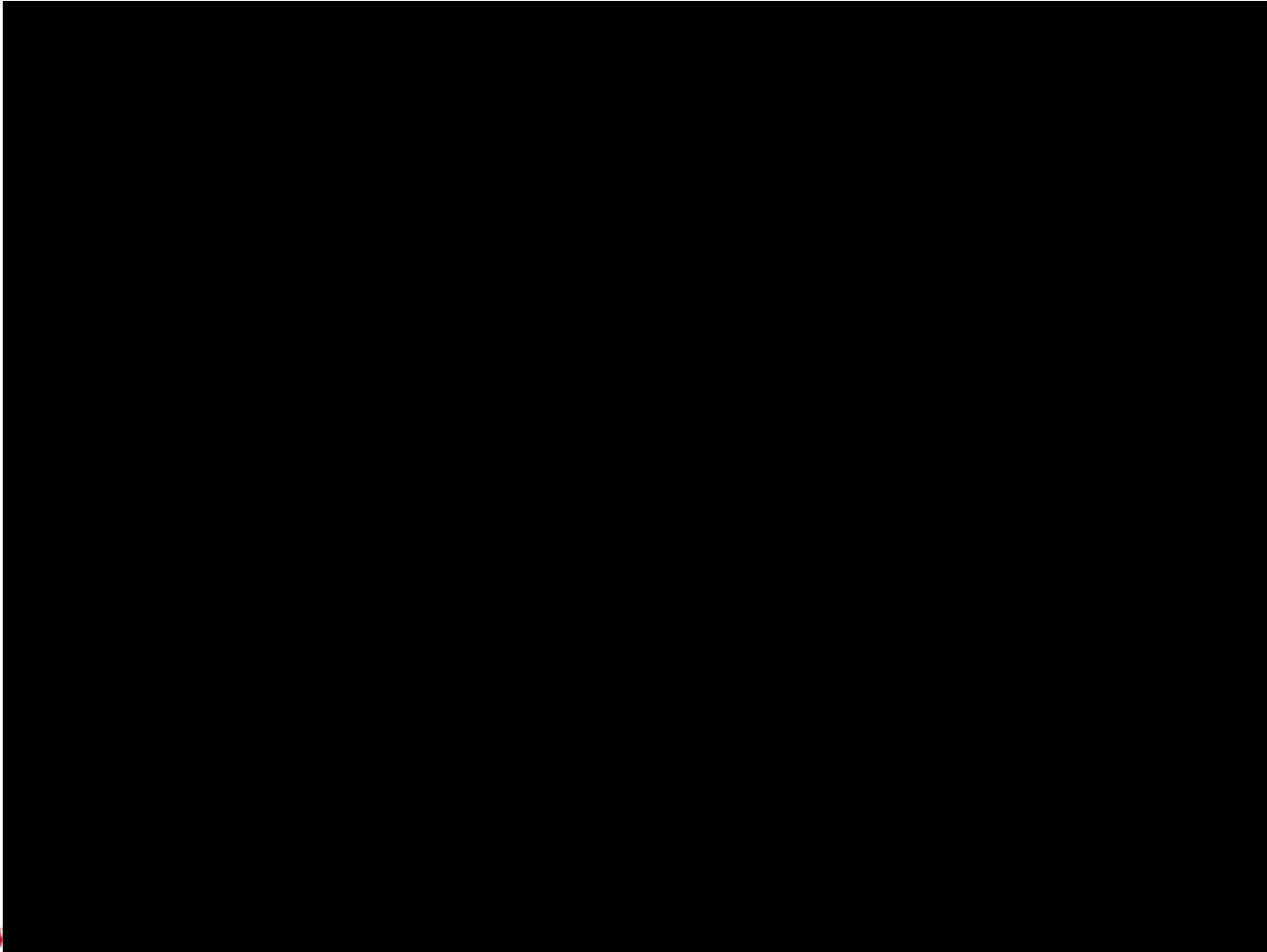
# “German Institute guarantee”



# Qpack TVC Hungary



# Qpack TVC Czech Republic



# Global brands

Erik Frimout

# The consumer recognizes different segments above core lager



## Segmentation

## Price ranges

## Size

International specialty beers

> 180

1

Super premium beers

> 130

4

Premium beers

110 >< 130

4

Core lagers

90 >< 110

70

Value lagers

75 >< 90

7

Price lagers

< 75

4

(exceptions for certain markets)

# INTB exploits fully it's portfolio answering different needs



Sophisticated Super Premium  
European Lager

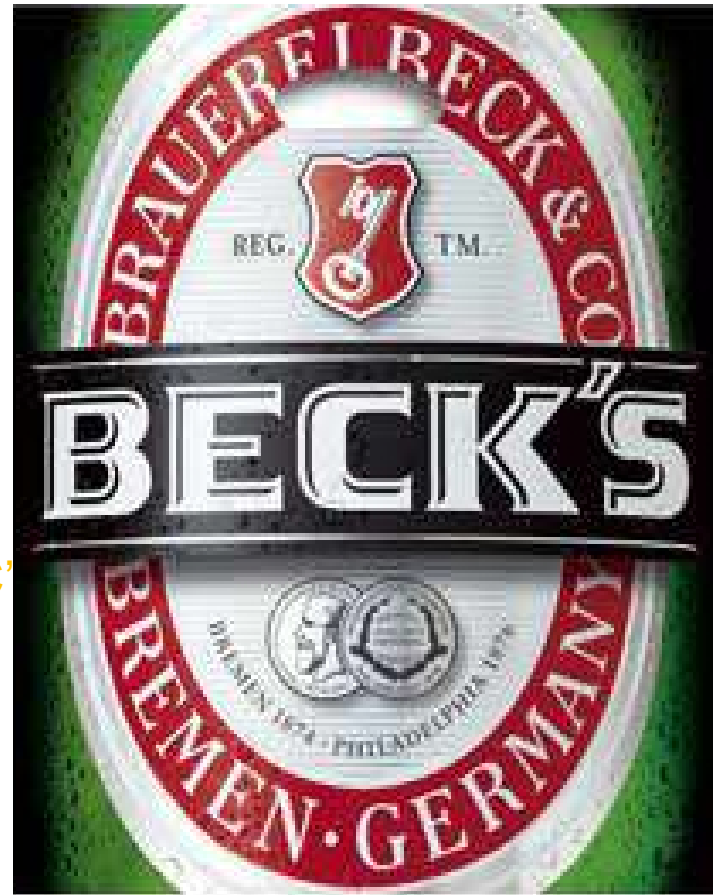


Germany's N° 1 exported beer





# Stella Artois & Beck's are complementary brand personalities



C

# bottles



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# Stella Artois TVC flowers Croatia



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# Stella Artois TVC Monet Hungary



# Stella Artois TVC new bottle Croatia



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# TVC Beck's Romania

Each drop from this bottle of Beck's is:  
A) Obtained only from natural ingredients  
B) Produced with German precision  
C) Extra round for full of flavor



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# TVC Beck's Romania



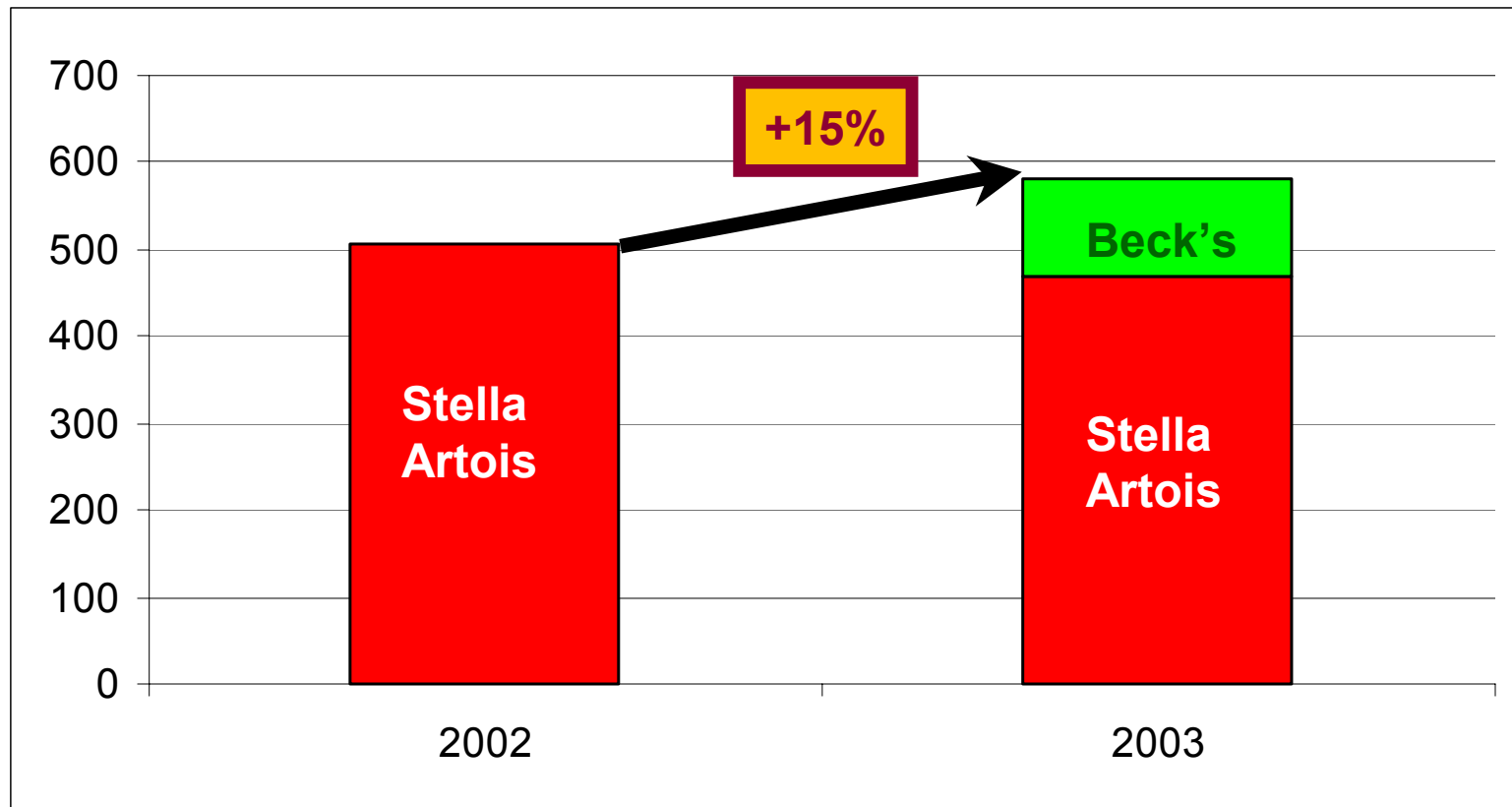
# S.A. & Beck's are systematically rolled out through brewing licenses



	Stella Artois	Beck's
Bosnia	1998	2004
Bulgaria	1998	2004
Croatia	1996	2004
Czech R	2000	TBD
Hungary	1994	2004
Romania	1996	2003
Serbia/Mngro	1997	TBD



# Romania 2003: Beck's on top of Stella Artois



# Hoegaarden, Leffe, Belle Vue



- Segments still “underdeveloped” compared to Western Europe
- INTB specialty brands have over 50% segment/share
- Early entry guarantees advantage in the mid/long term