



Hungary

Population: 10.13 million (plato 2007)

Per capita beer consumption: 77.6 liters (plato 2007)

Major languages: Hungarian

Anheuser-Busch InBev in Hungary key facts & figures*

Trading Name	Borsodi Sorgyar Zrt.
Volume of product sold in 2008	1.9 million hectoliters
Market position	Number 3 in the market
Market share¹	25.1%
Beverage plants	Borsodi (VPO qualified)
Plants operating VPO	Borsodi is qualified
Number of Full time employees	Approximately 650 employees
Number of Global Management Trainees	1

Brands

Global Brands	Beck's, Stella Artois
Multi-country Brands	Leffe, Hoegarden, Staropramen
Local Brands	Borsodi
Belgian Beer Café's	7 – Gyor, Szekesfehervar, Miskolc, Budapest, Zalaegerszeg, Veszprem, Debrecen

Brief history of InBev in Hungary

Anheuser-Busch InBev acquired Borsodi in 1991. This was Anheuser-Busch InBev's first foreign acquisition.

Local claims/awards

Claims with local sign-off

¹ Domestic own beer market share, based on 3rd party retail audit



Borsodi Sör is number 1 in the market with a 15,2 % market share (2008 Nielsen).

Market facts & figures²

Other market players

Market analysis and growth outlook

There are two other equally competitive breweries; SAB Miller/Dreher and Heineken. Key competitive brands are Aranyaszok and Sapróni Aszok each with about 11% market share.

Trends in per capita consumption actually decrease: 76.5 liters per capita in 2007; 71.4 liters per capita in 2008; forecast 75 liters per capita in 2010; Trends in population decrease: 10.175 million in 2002; 10.097 million in 2005; 10.045 million in 2008; forecast 10.025 million in 2010.

Hungary is a stagnating market, with a decline in volumes resulting from an increasingly ageing population and changing consumer habits among younger people. Imported brands have become less expensive since EU accession within what is a price sensitive market. Major supermarket and hypermarket chains are becoming increasingly influential in the off-trade sector, with retailers such as Tesco and discounters, growing in popularity amongst consumers. Heavy price competition.

Corporate citizenship

Environment and Corporate Responsibility initiatives

Campaigns focused on promoting responsible drinking (Do not drink and drive) and beer culture cooperation with the Association of Hungarian Brewers.

Other initiatives managed by Borsodi Sörgyár Zrt. are:
'18YES' campaign against under-age drinking; the most responsible campaign award of Hungarian Advertisement Association.

'Brewery my Neighbours' with cooperation with local governments and other organizations near Bőcs site.

Environmental initiatives (cooperation with the World Wildlife Fund).

Anheuser-Busch InBev management

Zone President

Hungary is in Anheuser-Busch InBev's Central & Eastern Europe Zone, led by Zone President, Francisco Sá.

Country Manager

Mario Netto

For further information contact

+36 1 778 6000

www.borsodisorgyar.hu

² Information sourced from Platologic unless otherwise stated.