



## India

**Population:** 120.1 million (plato 2007)

**Per capita beer consumption:** 1.1 liter (plato 2007)

**Major languages:** Hindi, English for business and politics and 21 other official languages

### Anheuser-Busch InBev in India key facts & figures

<b>Trading Name</b>	InBev India
<b>Beverage plants</b>	Two Co-Packing Agreements in Place at Regent Breweries and Dassappa and Sons. Both Plants are producing Tennents Super, Anheuser-Busch InBev Strong Beer offering. Dassappa is supplying the Bangalore Market and Regent the New Delhi area. In July 08 InBev India took management control of Kool Brewery.
<b>Number of Employees</b>	Approximately 30 employees

### Brief history of Anheuser-Busch InBev in India

In May 2007, Anheuser-Busch InBev announced a long-term joint venture agreement with RKJ; a leading beverage group operating in India. Prior to the signing of the joint venture with RKJ, Anheuser-Busch InBev engaged in small scale export activities in India.

In April 2008, Anheuser-Busch InBev confirmed that it entered ia long-term contract with Dasappa & Sons in the south-western Indian state of Karnataka where Dasappa will produce Anheuser-Busch InBev beers Tennents and Beck's.

Following the merger between InBev and Anheuser-Busch in November 2008, Crown breweries, a wholly subsidiary of Anheuser-Busch also becomes part of the newly combined company; this includes a state of the art brewery in Hyderabad with a capacity of 500K H/L. Crown and InBev India will work closely in 2009 to develop the most effective route to leverage the newly combined portfolio.

### Brands

Anheuser-Busch InBev entered the Indian beer market in 2007. Tennents Super will be the brand targetted at India's largest and fastest growing sector of strong beer. InBev India is also seeding Stella Artois, Hoegaarden and Leffe in various segments of the market.



## Market facts & figures<sup>1</sup>

### Other market players

United Breweries (UBL) has a 47% market share and a leading position in 9 states. Heineken controls 37.5% of UBL since the S&N deal was finalised at the end of April 2008. Their brands include Kingfisher, Kingfisher strong, , UB Export Lager, London Pilsner, Kalyani Black Label Premium.

SABMiller (Shaw Wallace) has a 36% market share (including 3% from Fosters India, acquired in 2006). They have a leading position in 3 states with brands including Castle, Hayward 5000, Fosters, Knock Out, Royal Challenge.

Anheuser-Busch purchased 100% of the shares of their Joint Venture partner, Crown breweries, finalized early June 2008.

### Market analysis and growth outlook

Trends in per capita beer consumption: 0.6 liters per capita in 2000; 0.8 liters per capita in 2005; forecast 1.5 liters per capita in 2010. Trends in population growth: 1013.2 in 2000; 1092.6 million in 2005; forecast 1162.6 million in 2010.

India's macro-economic and demographic prospects are favorable. However with a huge and still growing population, economic progress remains patchy and industrial development remains impeded by a poor infrastructure. Nevertheless economic growth rates are currently above 7%.

The Indian beer market is currently fragmented; the Central (21%) and Southern (46%) states accounting for 67%; the main states in North (incl Delhi) for 18%; North East (5%) and West (7%) accounting for 12%; Others (not allocated): 3% of beer consumption.

The market for strong beers is predicted to grow faster than that of milder beers because it is perceived as offering a value for money alternative to spirits

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<sup>1</sup> Data sourced from Platologic and Euromonitor