

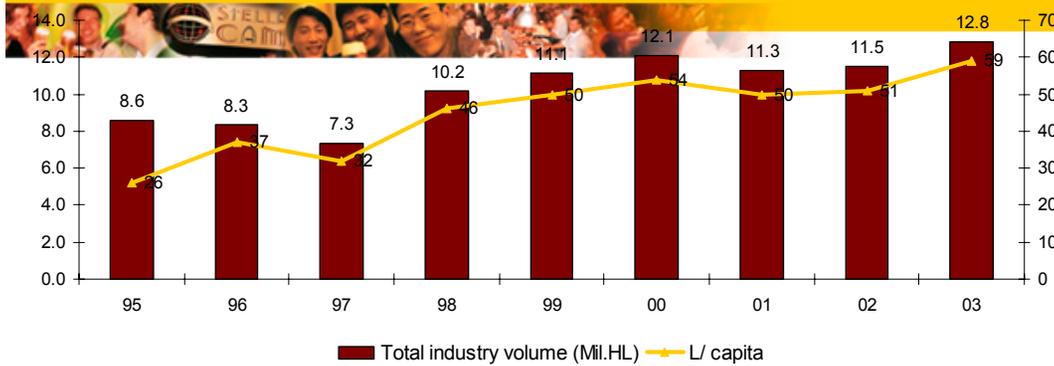
Focus Bergenbier

Number 1 Brand



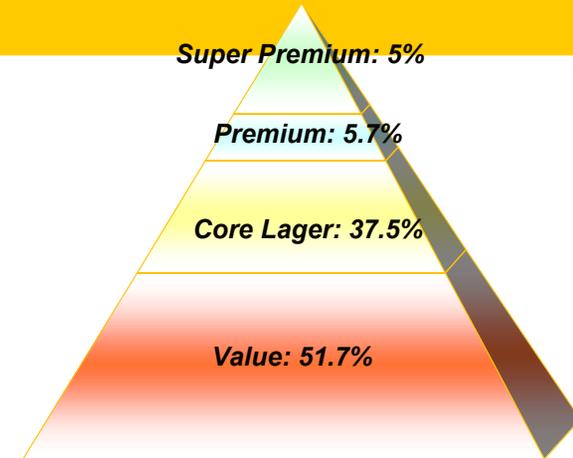
Romanian Beer Market Overview

Romanian Beer Market Evolution: 1995-2003



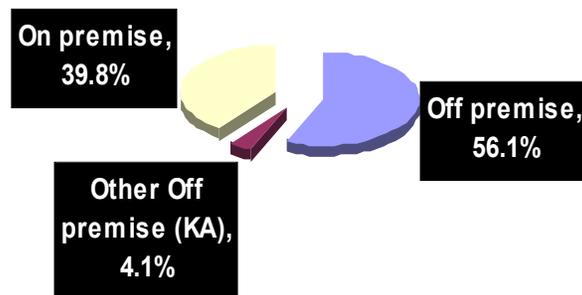
Source: Breweries Association

Beer Market Segments, 2003



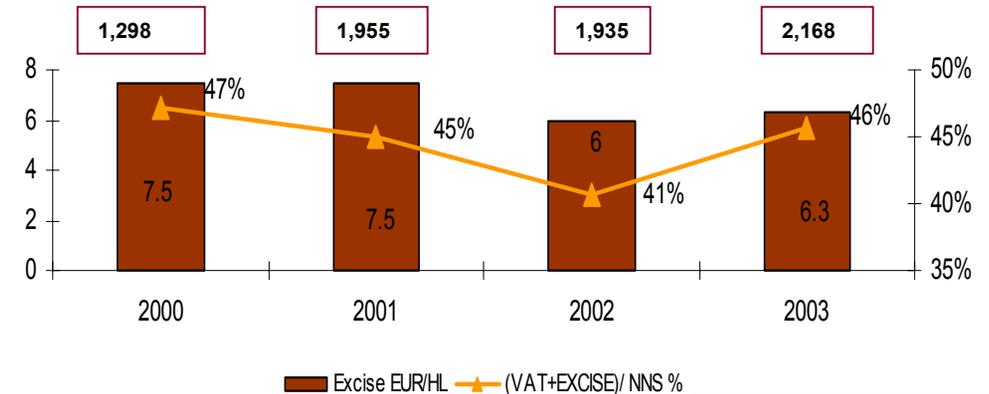
Source: MEMRB National Retail Audit Company

Market split by channels 2003



Source: MEMRB National Retail Audit Company

Interbrew: Excises and Taxes evolution



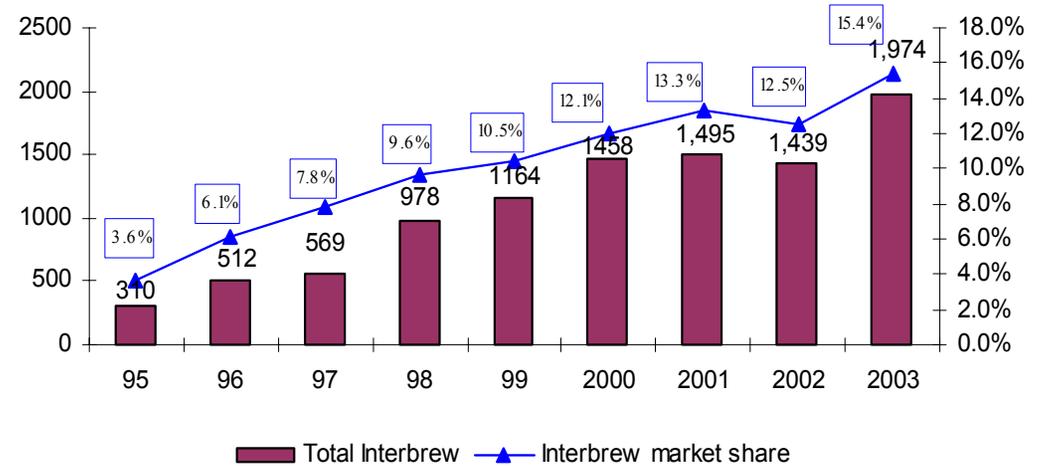
GDP/capita (EUR)

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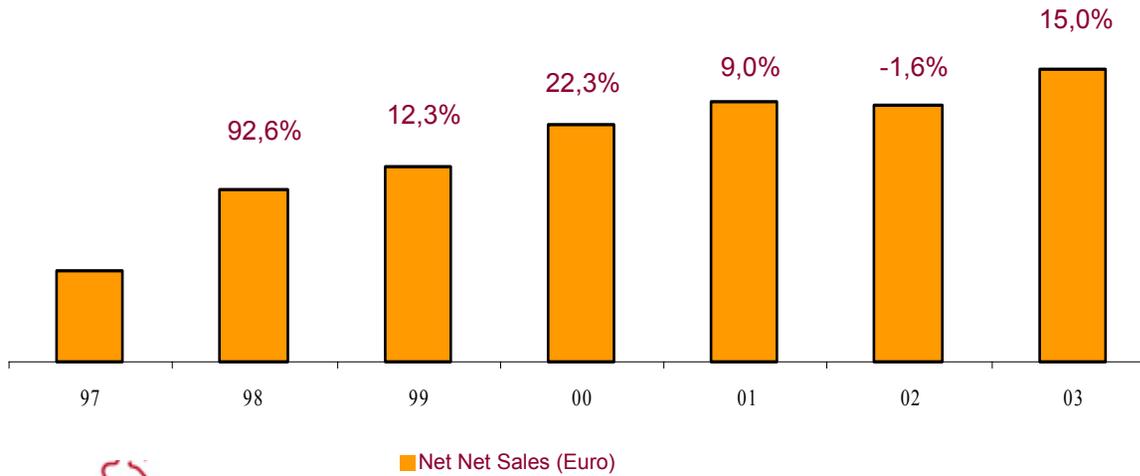
Interbrew Romania Sales



Interbrew volumes and market shares in total market (KHL)



Interbrew Net Net Sales Evolution (KEURO)



Source: Breweries Association



Net Net Sales (Euro)

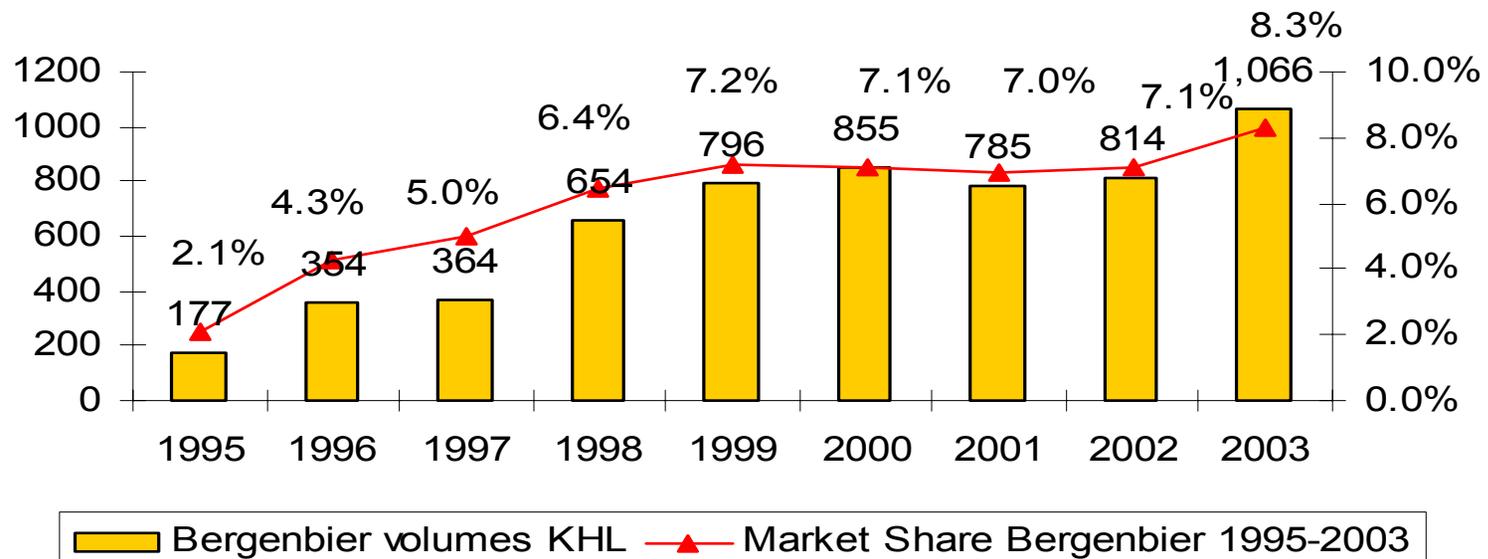


Bergenbier History



- **April 1994:** Interbrew take-over of Blaj brewery- (under construction)
- **May 1995:** Launch of Bergenbier
- **2003:** Bergenbier has 54% of the Interbrew sales

Bergenbier volumes&market shares 1995-2003



Source: Breweries Association

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Bergenbier Success Drivers

1. Consistent positioning & communication as beer for young adults



For Young people



Especially for football supporters



A beer for drinking among males

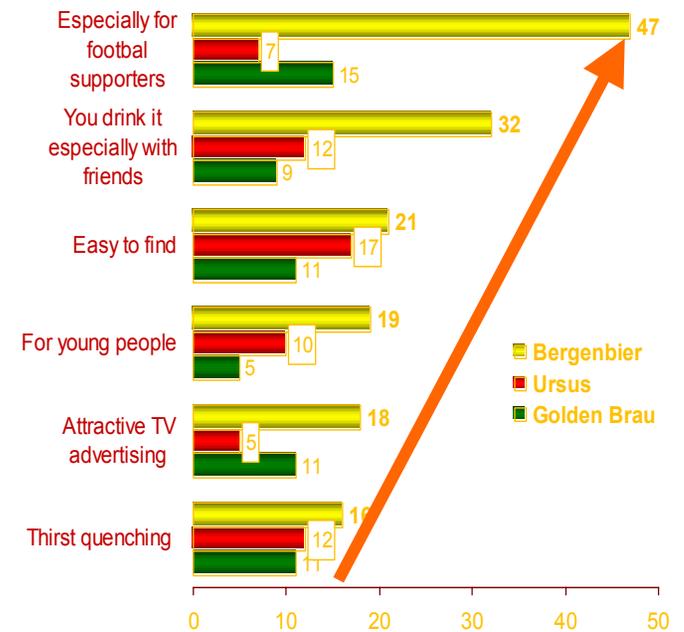


To be drunk especially with friends



Stimulates good time and fun

Image Attributes by Main Core Lager Brands



Source: GfK Brand Performance Quantitative Study 2003



Bergenbier Success Drivers

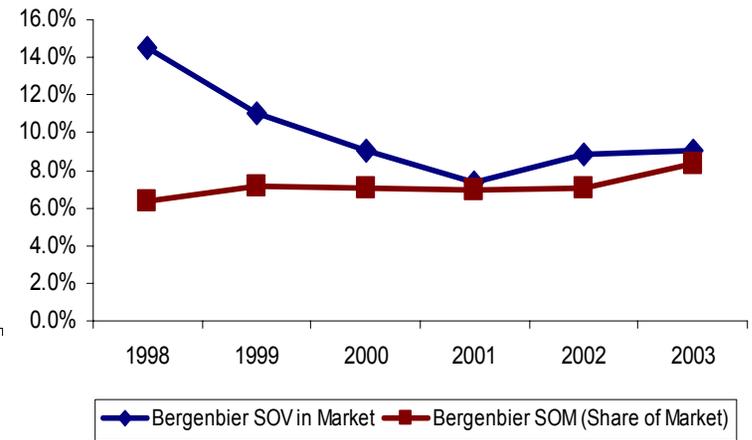
2. Consistent brand investment.



Brand spendings (Euro)



brand spendings (Euro)



Source: Breweries Association and Alfa Cont

Bergenbier Success Drivers

3. Focus on exclusive wholesalers

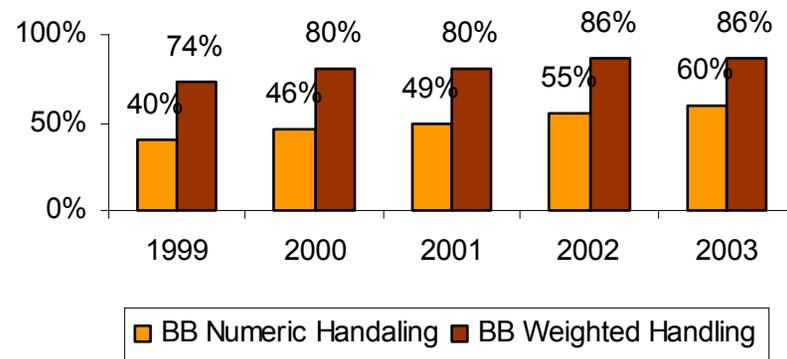


- Partnership programs (logistics and Infrastructure)
- Cooperative market activity (Exclusives Retailers, local promotions, POSM, joint trade investments)
- Drive active distribution



One wholesaler/county
Exclusive beer category

Bergenbier Numeric & Weighted Handling



Source: MEMRB National Retail Audit



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Bergenbier Success Drivers

4. Consistent drive for innovation



➤ Packaging/liquid



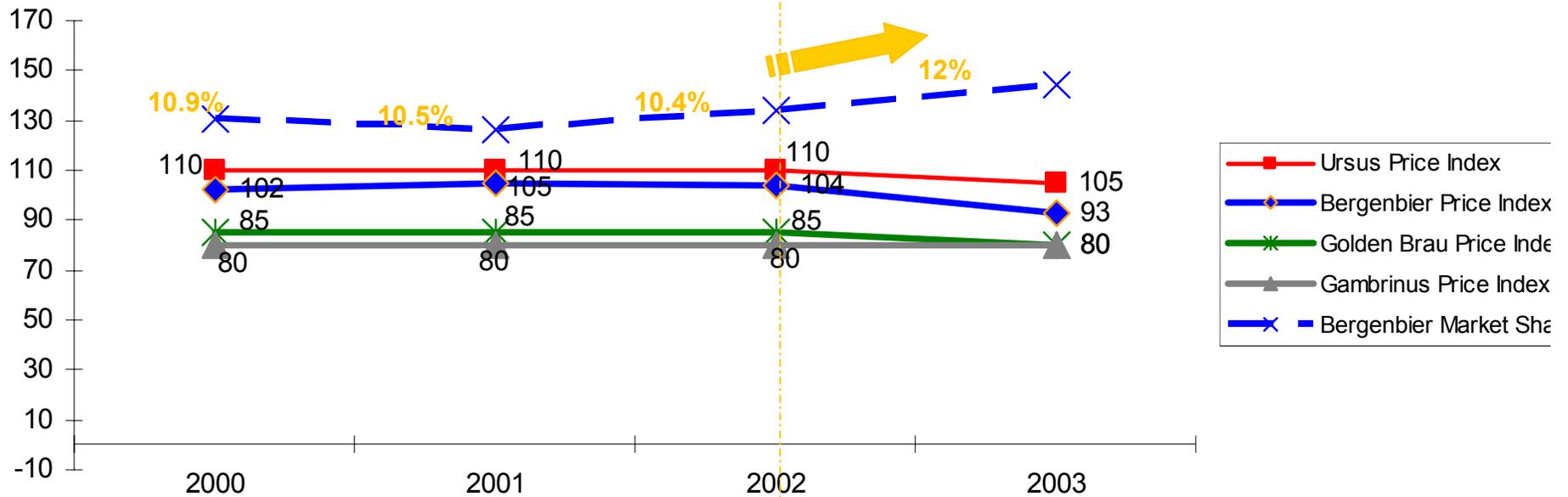
➤ Route to market (Fridge, quality draught, shelves)



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Bergenbier Success Drivers

5. Remain Price Competitive and Accessible

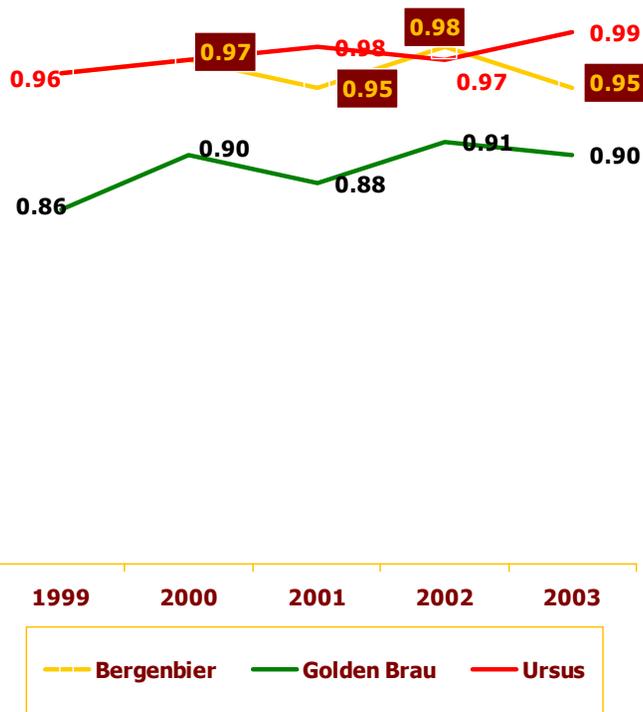


Bergenbier Success Drivers

6. Constant Search for Excellent Quality



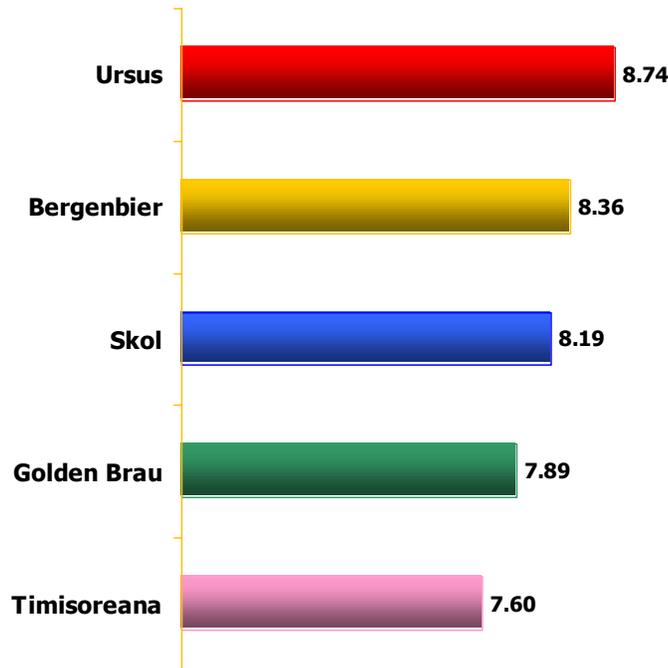
Liking Ratio
Likes/(Likes+Dislikes)



Source: GfK Brand Performance Study 2003

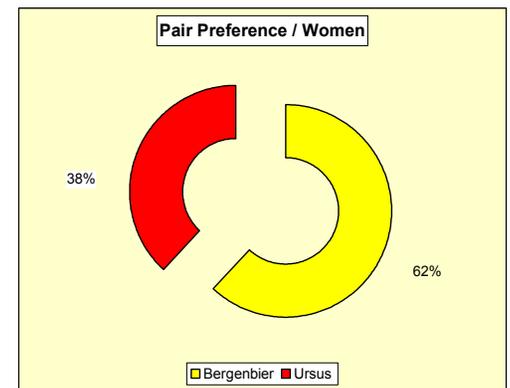
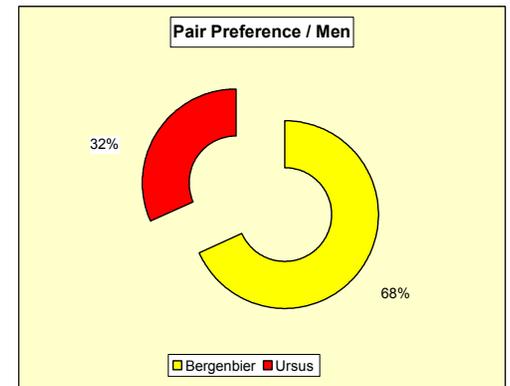


Overall Evaluation
Scale from 1 to 10, where 10 is "excellent"



Source: GfK Brand Performance Study 2003

Pair Preference for
Bergenbier Vs Ursus Premium



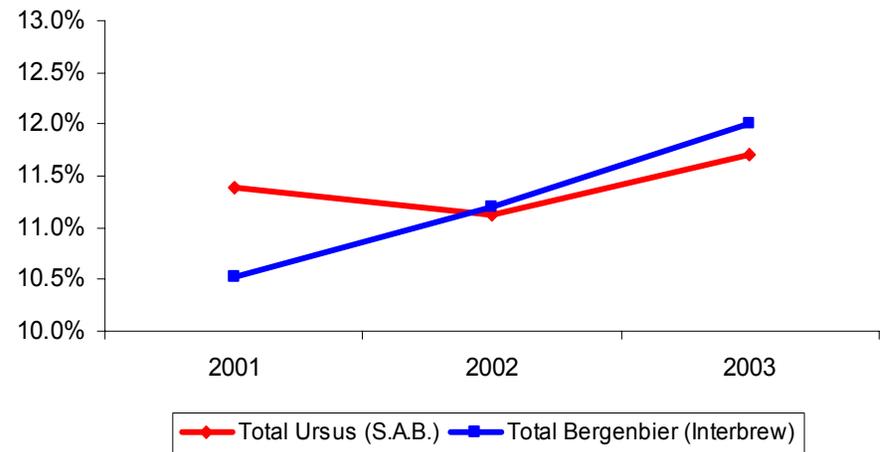
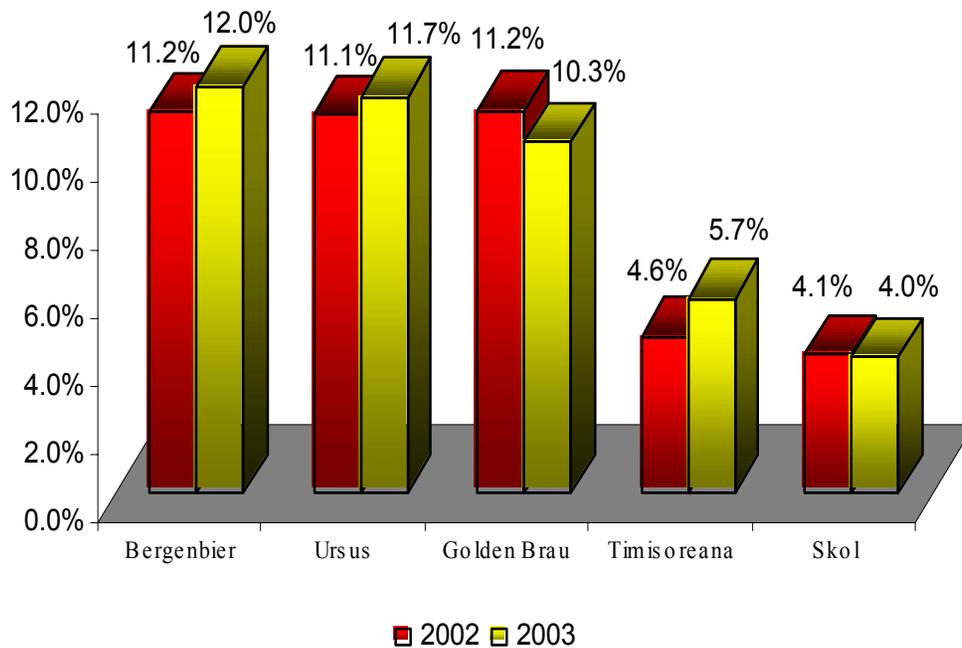
Source: Liquid Interbrew Qualitative Study April 2004



Top 5 brands in Romania



Fight with the main competitor
Market shares evolution



Source: MEMRB National Retail Audit Company
2002-2003

Source: MEMRB National Retail Audit Company
2002-2003



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