Focus Bergenbier

Number 1 Brand
Romanian Beer Market Overview


- **Core Lager**: 37.5%
- **Premium**: 5.7%
- **Super Premium**: 5%
- **Value**: 51.7%

**Beer Market Segments, 2003**

- **Super Premium**: 5%
- **Premium**: 5.7%
- **Core Lager**: 37.5%
- **Value**: 51.7%

**Source:** Breweries Association

**Market split by channels 2003**

- **On premise**: 39.8%
- **Off premise**: 56.1%
- **Other Off premise (KA)**: 4.1%

**Interbrew: Excises and Taxes evolution**

- **2000**: 7.5, 47%
- **2001**: 7.5, 45%
- **2002**: 6, 41%
- **2003**: 6.3, 46%

**Source:** MEMRB National Retail Audit Company

**GDP/capita**

- **(EUR)**

**Excise EUR/HL**

- **(VAT+Excise)/NNS %**

**The World's Local Brewer®**
Interbrew Romania Sales

Interbrew volumes and market shares in total market (KHL)

Interbrew Net Net Sales Evolution (KEURO)

Source: Breweries Association
- **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
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

Especially for football supporters
You drink it especially with friends
Easy to find
For young people
Attractive TV advertising
Thirst quenching

Source: GfK Brand Performance Quantitative Study 2003
Bergenbier Success Drivers
2. Consistent brand investment.

Brand spendings (Euro)

Sorce: 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

Bergenbier Numeric & Weighted Handling

Source: MEMRB National Retail Audit
Bergenbier Success Drivers
4. Consistant drive for innovation

- Packaging/liquid

- Route to market (Fridge, quality draught, shelves)
Bergenbier Success Drivers
5. Remain Price Competitive and Accessible

Ursus Price Index
Bergenbier Price Index
Golden Brau Price Index
Gambrinus Price Index
Bergenbier Market Share

10.9% 10.5% 10.4% 12%
110 105 110 110
80 85 85 80

2000 2001 2002 2003
Bergenbier Success Drivers

6. Constant Search for Excellent Quality

**Liking Ratio**

\[
\frac{\text{Likes}}{\text{Likes}+\text{Dislikes}}
\]

<table>
<thead>
<tr>
<th>Year</th>
<th>Bergenbier</th>
<th>Golden Brau</th>
<th>Ursus</th>
</tr>
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<tbody>
<tr>
<td>1999</td>
<td>0.86</td>
<td>0.90</td>
<td>0.96</td>
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<tr>
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<td>0.88</td>
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<tr>
<td>2003</td>
<td>0.90</td>
<td>0.90</td>
<td>0.95</td>
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</tbody>
</table>

**Pair Preference / Men**

- Bergenbier: 68%
- Golden Brau: 32%

**Pair Preference / Women**

- Bergenbier: 38%
- Golden Brau: 62%

**Overall Evaluation**

Scale from 1 to 10, where 10 is “excellent”

<table>
<thead>
<tr>
<th>Brand</th>
<th>Evaluation</th>
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</thead>
<tbody>
<tr>
<td>Ursus</td>
<td>8.74</td>
</tr>
<tr>
<td>Bergenbier</td>
<td>8.36</td>
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<tr>
<td>Skol</td>
<td>8.19</td>
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<tr>
<td>Golden Brau</td>
<td>7.89</td>
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<tr>
<td>Timisoreana</td>
<td>7.60</td>
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</tbody>
</table>

Source: GfK Brand Performance Study 2003

Source: Liquid Interbrew Qualitative Study April 2004

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**Pair Preference for Bergenbier Vs Ursus Premium**

- Bergenbier: 68%
- Ursus: 32%

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Source: GfK Brand Performance Study 2003
Top 5 brands in Romania

Fight with the main competitor
Market shares evolution

Source: MEMRB National Retail Audit Company 2002-2003