

**Anheuser-Busch InBev**  
**Investor Seminar**  
**2019**



**ABInBev**



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# OTHER STYLES

**Premium**  
**Super Premium**





# Marcelo 'Mika' Michaelis

President, Brewers Collective

Hometown: Sao Paulo, Brazil

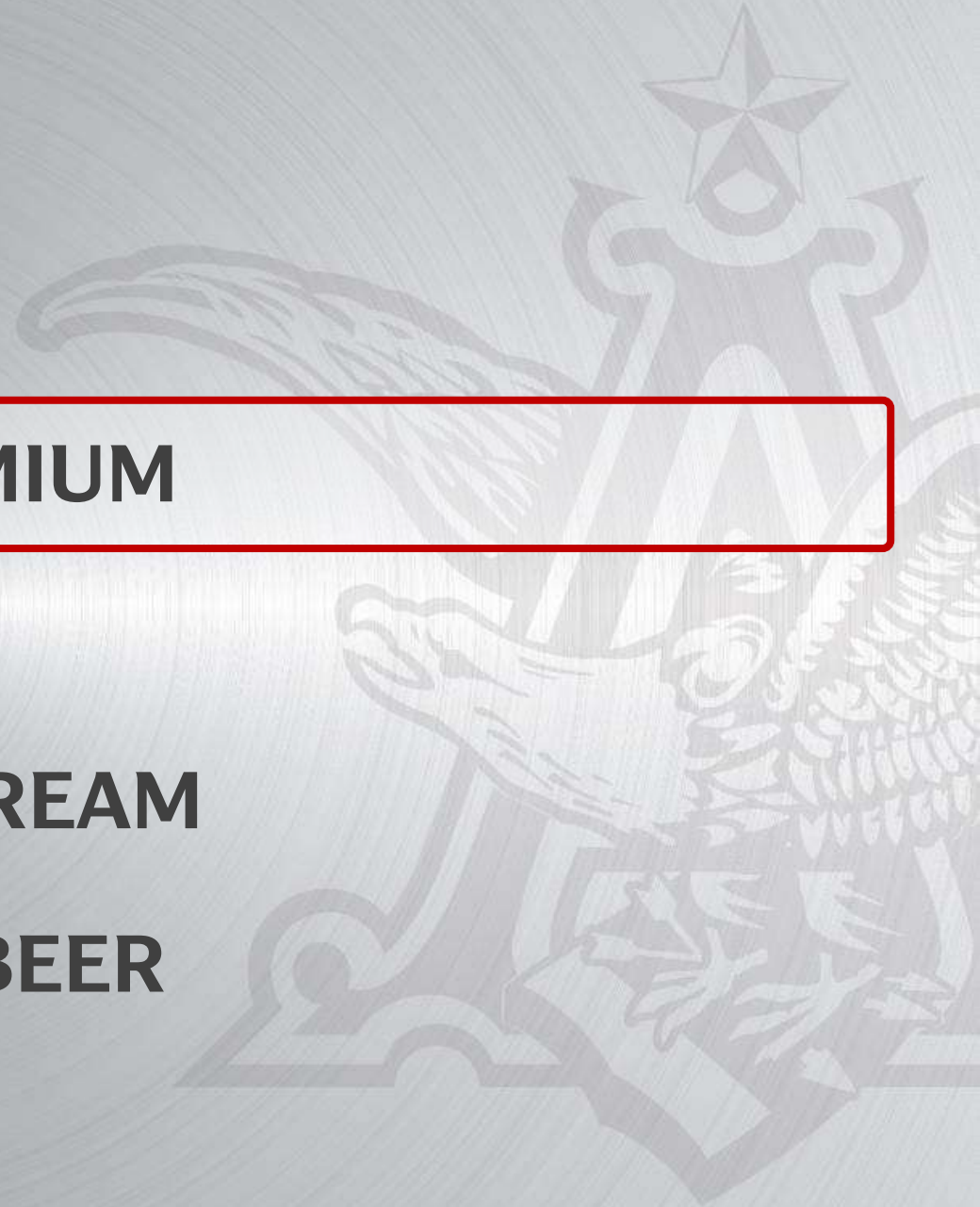
Time at ABI: 17 years

Favorite Beer: Golden Road Wolf Pup



# 5 PRIORITIES

- 1 EXPAND CORE PLUS
- 2 LEAD & DEVELOP SUPER PREMIUM
- 3 DISRUPT PREMIUM
- 4 STABILIZE SHARE OF MAINSTREAM
- 5 CAPTURE GROWTH BEYOND BEER





# WHO IS



# 12 AMAZING BREWERIES

## THE BEST MINDS IN BEER

# #1 CRAFT SUPPLIER






# WHAT'S GOING ON IN CRAFT ?



**LOCAL IS  
KEY**



**CONSUMER  
LED  
INNOVATION**



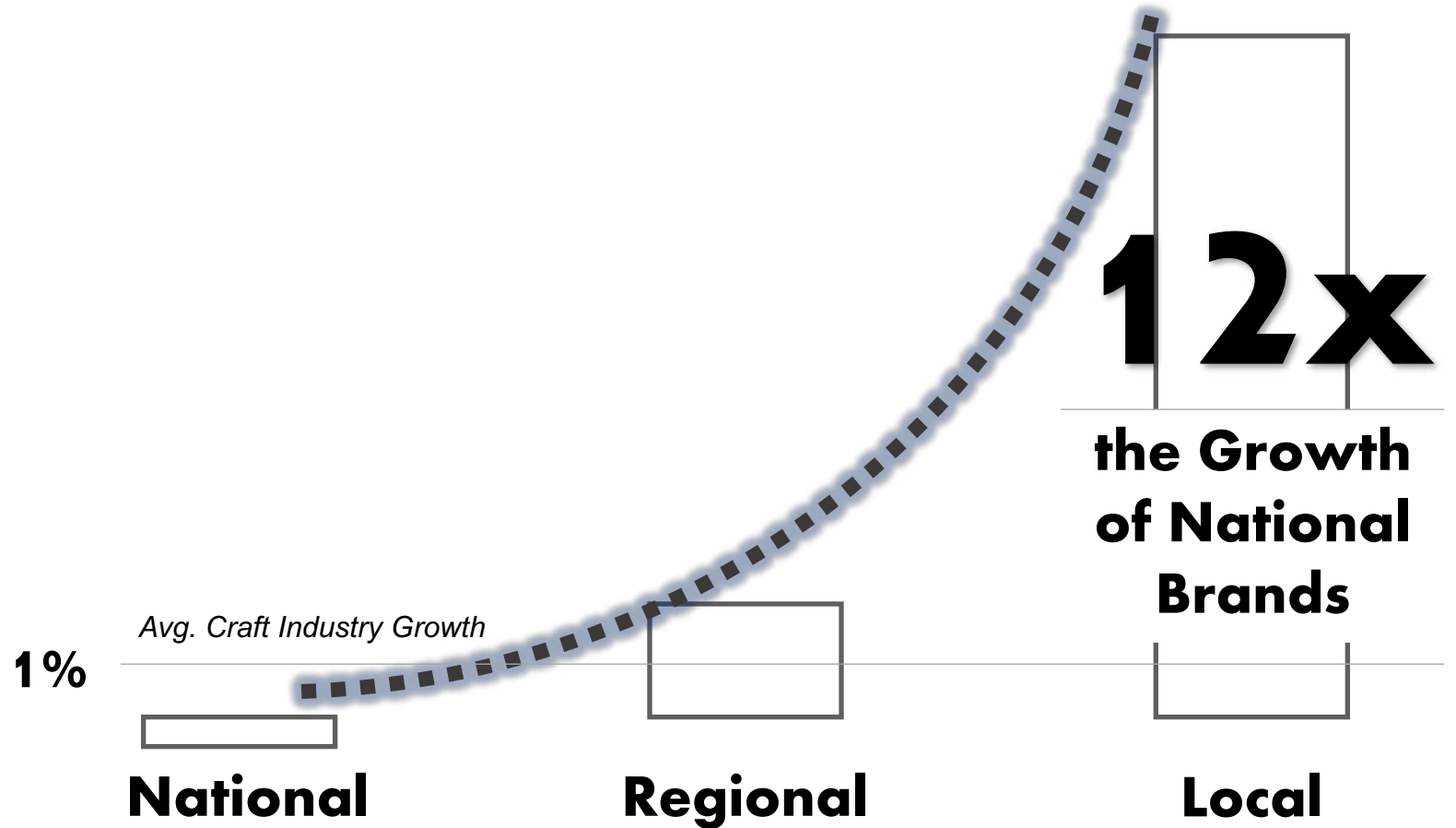
**CULTURAL  
RELEVANCE**



# WHAT'S GOING ON IN CRAFT ?



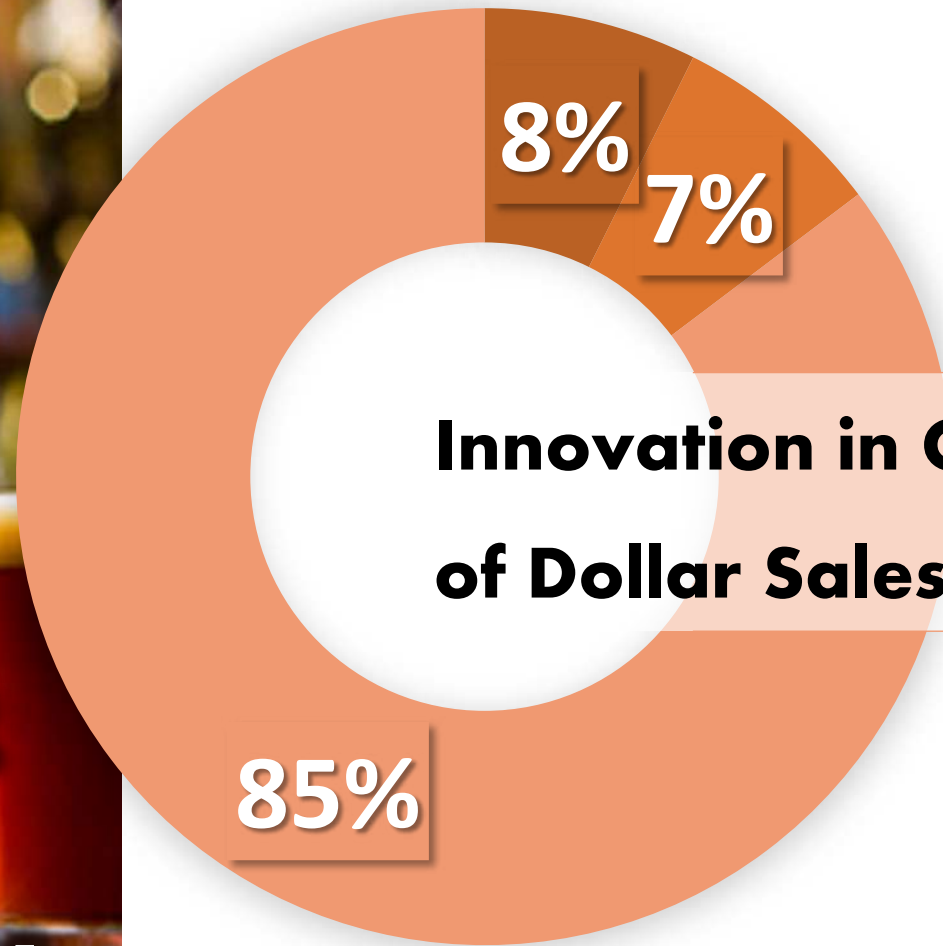
**LOCAL IS  
KEY**




Source: IRI TUS Dollar Sales Q1 2019



# WHAT'S GOING ON IN CRAFT ?



**Innovation in Craft represented 85% of Dollar Sales growth in 2018**

-  Liquid Innovation
-  Existing brands
-  New breweries

**CONSUMER  
LED  
INNOVATION**



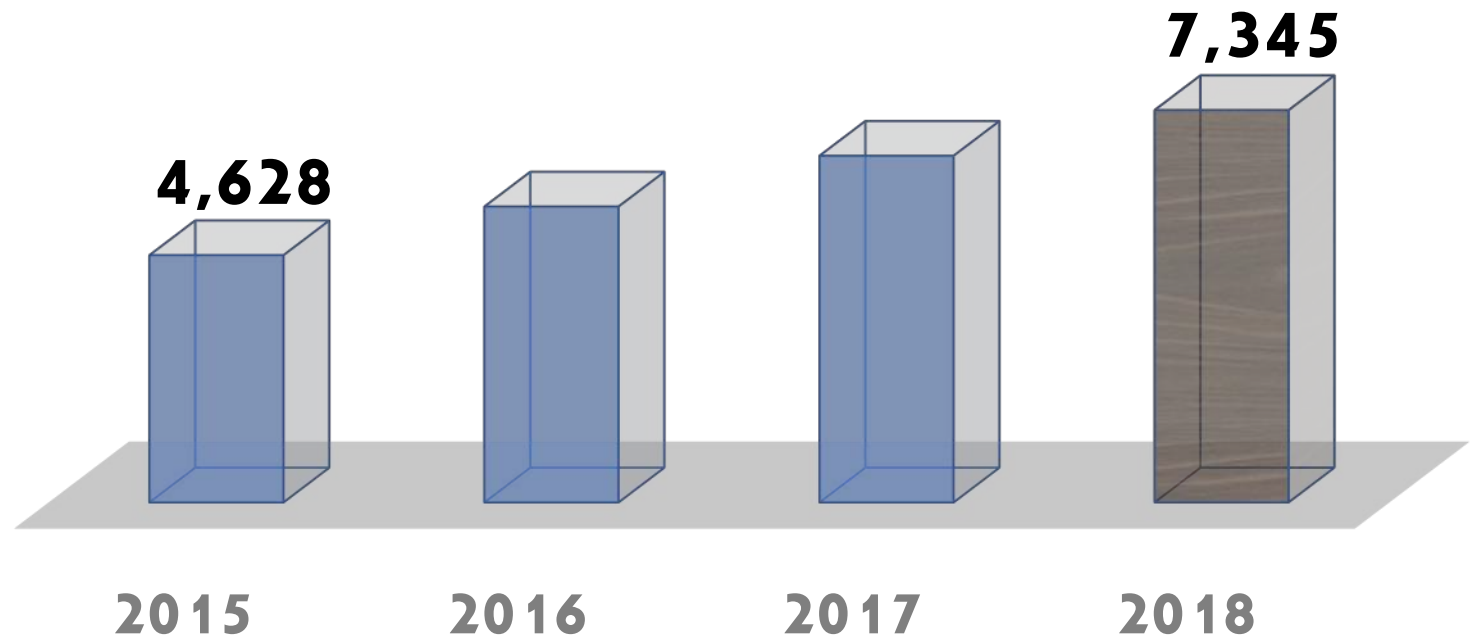
# WHAT'S GOING ON IN CRAFT ?

**7,000+**  
Craft Breweries  
last year

All of them  
fighting for  
attention



**CULTURAL  
RELEVANCE**



Source: Brewers Association



# HOW ARE WE DOING ?

## Q1 2019 Growth

 BREWERS  
COLLECTIVE

**19x**

US Craft  
Industry  
**1%**



# OUR 2019 PLAN

## Three Jobs to be Done

1

WIN IN  
HOME  
MARKETS

2

STAY AHEAD  
OF EMERGING  
TRENDS

3

CUT  
THROUGH  
THE CLUTTER



1

# WIN IN HOME MARKETS

**Mindset: Act like a big brand in home markets**



**RIGHT EXPERIENCES**



**RIGHT PEOPLE**



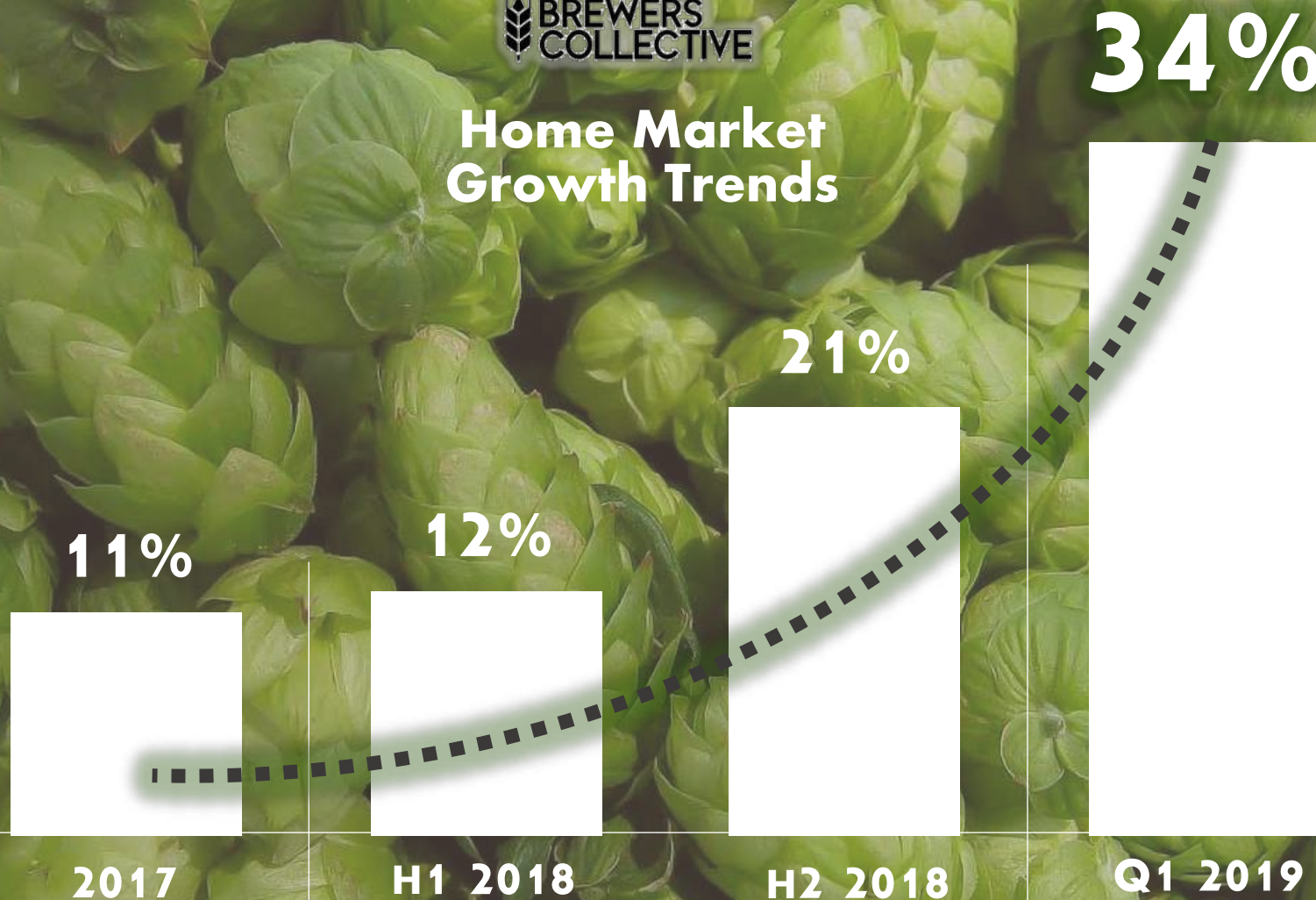
**RIGHT PORTFOLIO**



# OUR HOME MARKETS ARE ACCELERATING



## Home Market Growth Trends



Source: IRI Brewers Collective Home Market Volume Sales Combined 2017, 2018, and Q1 2019



# 2 STAY AHEAD OF EMERGING TRENDS

**Mindset: Win key styles and key consumers**





# OUR INNOVATIONS ARE MARKET LEADING

Q1 2019

Brewers  
Collective  
represents

**30%**

of Total Craft  
Innovation  
Dollar Sales

**5**

Out of Top 10  
Craft Innovations  
in Dollar Sales



**1**

**2**

**3**

**4**

**5**

Source: IRI TUS Craft Innovation  
Dollar Sales Q1 2019



# 3 CUT THROUGH THE CLUTTER

**Mindset: Earn more impressions, faster**



**MURPHY**  
**BRODY & VALOR**  
**POKI**  
**CLEMENTINE**

**GOLD LEAF**  
ADVENTURE DOG CONTEST  
*Edition*  
Featuring the illustrations of our fan-voted winning pups from our Gold Leaf Adventure Dog Photo Contest.  
COMING JULY 2019

**DB**  
DEVILS BACKBONE  
BREWING COMPANY



**ELYSIAN**  
GLITTER IS  
PRIDE ALE

**ELYSIAN**  
BREWING



**GOOSE ISLAND**  
BEER CO.



# SO FAR, OUR PLAN IS WORKING



1

**WIN IN  
HOME  
MARKETS**



2

**STAY AHEAD  
OF EMERGING  
TRENDS**

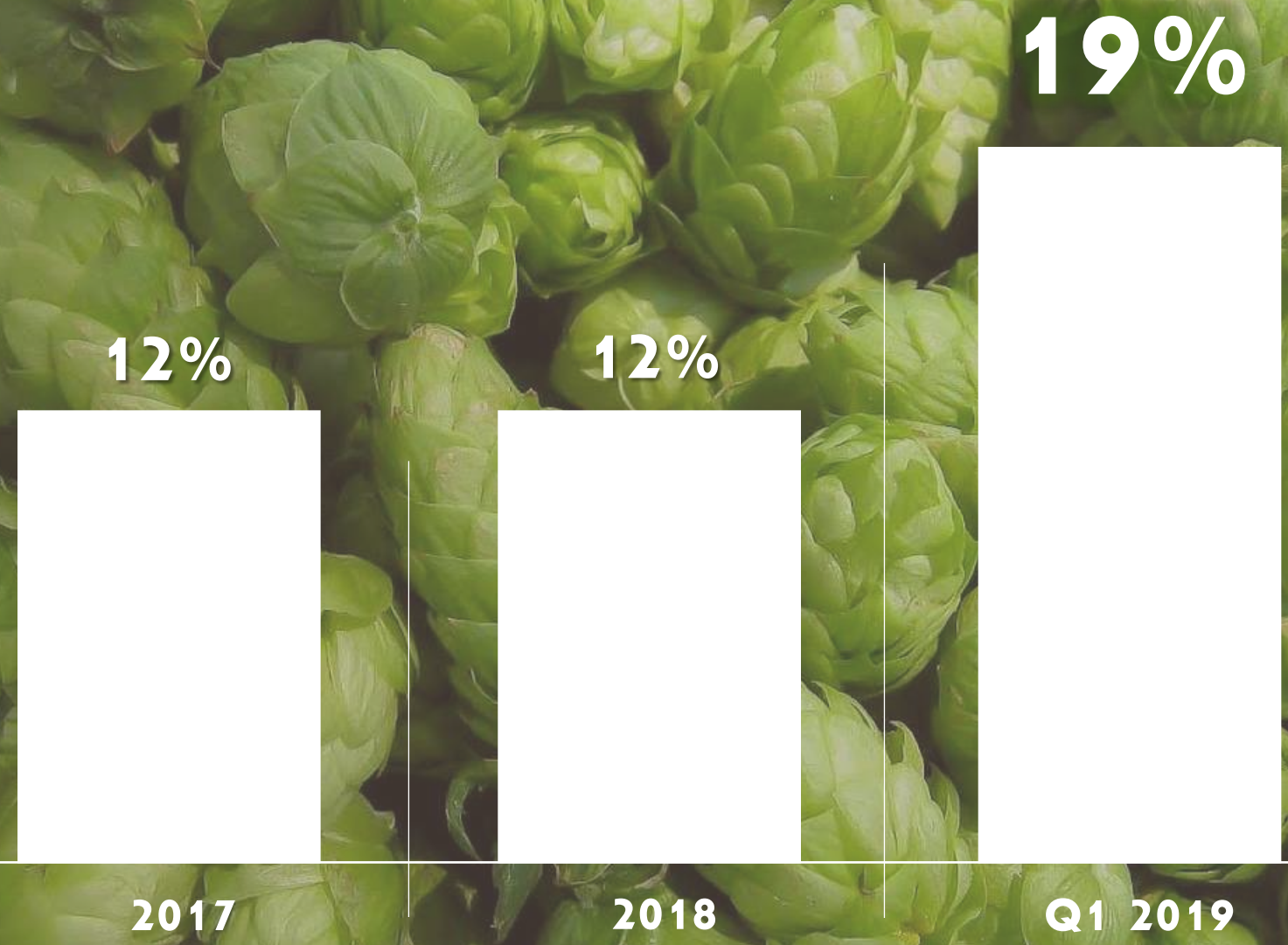


3

**CUT  
THROUGH  
THE CLUTTER**



# ACCELERATING GROWTH



Source: STRs 2017, 2018, Q1 2019 vs. Year Ago





**THANK YOU**