# Beer Market Insights 2014

## Australia

In-depth Analysis of Key Brewers, Brands, Volume, Value and Segmentation Trends and Opportunities in the Beer Market

Published: Jun 2014

# Summary

The Australia Beer Market Insights report comprises a high level market research data on the Australian beer industry. The report provides readers with an excellent way of gaining a thorough understanding of the dynamics and structure of the Australian Beer industry. Data includes volumes from 2009 to 2013 plus 2014 forecast, enabling historical and current trend analysis. In-depth market segmentation is presented: mainstream, premium, super premium, discount, alcoholic strength, local segmentation and beer type. It also provides data and analysis of the performance of both domestic and imported brands and reports on new product activity in 2013. It presents an analysis of industry structure, and reports on company volumes, with the addition of brewer profiles for the major brewers. The report provides distribution channel data for total market (on- vs off-premise) and discusses the latest trends in the key sub-channels. Packaging data includes consumption volumes by pack material, type, size, refillable vs non-refillable, multi-serve vs single serve. Market valuation data and pricing data are also provided.

# Key Findings

- Decline slows as the key players gain strength
- Price stagnation is over
- Following merger pain, CUB starts to feel the gain

# Reasons to Buy

- The Australia Beer Market Insight report is designed for clients needing a quality in-depth understanding of the dynamics and structure of the Beer market
- The report provides a much more granular and detailed data set than our competitors.
- Canadean's in-depth methodology provides consistent, reliable data which has been research and built from brand upwards by an experienced 'on-the-ground' industry analyst, who conducts face-to-face interviews with key producers, leading companies in allied industries, distributors and retailers
- Ideal for benchmarking total market vs retail audit and other data

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| Table 1: Beer Key Facts | | | | |
|---|---|---|---|---|
| | | | | |
| **Market Size 2013** | **Th. Hectoliters** | **Litres Per Capita** | | |
| Consumption | | | | |
| **Growth** | **CAGR% 08-13** | **CAGR% 10-13** | **CAGR% 12-13** | |
| Consumption M Litres | | | | |
| **Market Value 2013** | **AUD Million** | **AUD / Litre** | **US$ Million** | **US$ / Litre** |
| Value (at consumer price) | | | | |
| **Segmentation 2013** | **Discount** | **Mainstream** | **Premium** | **Superpremium** |
| % Share | | | | |
| **Distribution 2013** | **Off-Premise** | **On-Premise** | | |
| % Share | | | | |
| **Packaging 2013** | **Draught** | **PET** | **Glass** | **Metal** |
| % Share | | | | |
| SOURCE: Trade Interviews; Canadean Wisdom | | | | |

# Market Commentary

## Current and Emerging Trends

**Maybe the start of a structural shift, or maybe just the weather**

TEXT

## Outlook

**Lion takes the lead, CUB fights back, but can the duopoly be maintained?**

TEXT

## Imports and Exports

**Imports recover from the Miller hit**

TEXT

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## Segmentation

**Licensed and craft brands drive growth**

TEXT

**Table 2: Top 10 Beer Brands - Volume, 2011-2013**

| | | | 000 HL | | |
|---|---|---|---|---|---|
| Brand | Brand Owner | Local Operator | 2011 | 2012 | 2013 |
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SOURCE: Trade Interviews, Canadean

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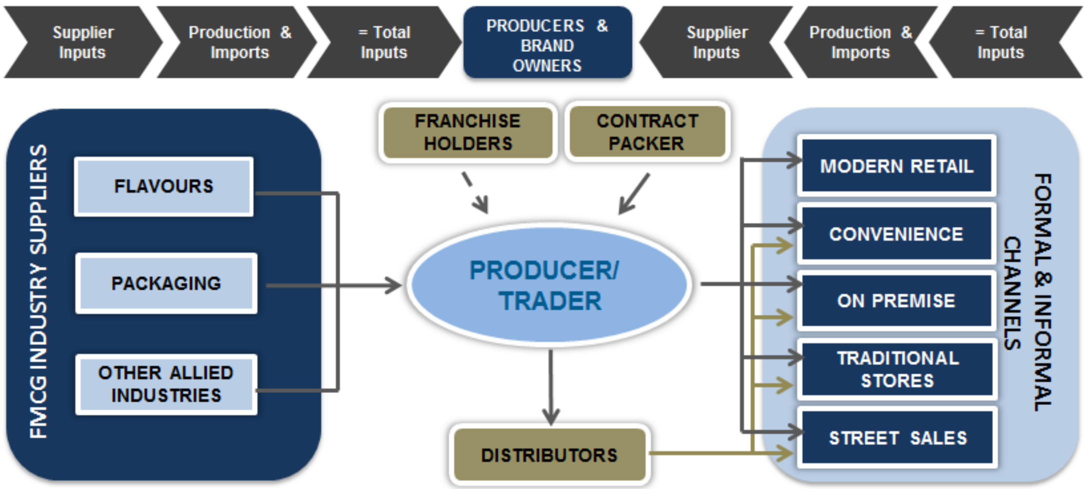
# Report Methodology

Our research methodology sets us apart from the competition. The key strength of our methodology is that we work in industry partnerships across the value chain, from suppliers to brand producers and both on- and off-premise channels. Our research is built from brand data upwards. This 'brick-by-brick' approach as well as the cross-fertilization with our other related services, ensures that our research has an internal logic which cross-checks from all angles - from brand volume through to corporate volume, flavor segmentation, packaging splits and channel distribution.




The companies featured in the company profiles and those whose brands are featured in the individual market categories are selected through regular market observation (see also our Quarterly Beverage Tracker) based on the size of their output and/or their dynamism.

## Sources

- Face-to-face interviews with the leading soft drinks producers, brewers, dairy, spirits and wine producers
- On-going dialogue with leading companies in allied industries
- Quarterly monitoring of product offered in all trade channels in selected markets
- Interviews with retailers and other distributors
- Company information in the public domain
- Trade press
- Trade associations
- Official production and trade statistics

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# Related Reports

## Beer Country Market Insight Reports and Wisdom Analytics Databases

### Asia

- Australia[1]
- China
- Hong Kong
- India
- Indonesia
- Japan
- Malaysia
- Philippines
- Singapore
- South Korea
- Taiwan
- Thailand
- Vietnam

### Americas

- Argentina
- Brazil
- Canada[1]
- Caribbean[2]
- Chile
- Colombia
- Costa Rica
- El Salvador
- Guatemala
- Honduras
- Mexico
- Nicaragua
- Panama
- USA[1]
- Venezuela

### West Europe

- Austria[1]
- Belgium[1]
- Denmark[1]
- Finland[1]
- France[1]
- Germany[1]
- Greece
- Ireland (Republic)[1]
- Ireland (Northern)
- Italy
- Netherlands[1]
- Norway[1]
- Portugal
- Spain[1]
- Sweden[1]
- Switzerland[1]
- United Kingdom[1]

### East Europe

- Bulgaria
- Croatia
- Czech Republic
- Estonia[1]
- Hungary
- Latvia
- Lithuania[1]
- Poland
- Romania
- Russia
- Serbia
- Slovak Republic
- Slovenia
- Turkey
- Ukraine

### Africa

Nigeria

In addition to above reports, top line data is also available for another 111 countries.

(1) Cider Market Insight Reports and Wisdom Databases also available. Cider data also available for New Zealand and South Africa.

(2) Includes data on: Antigua, Aruba, Bahamas, Barbados, Belize, Cuba, Curacao & others, Dominica, Dominican Republic, Grenada, Guadeloupe, Guyana, Haiti, Jamaica, Martinique, Puerto Rico, St Kitts, St Lucia, St Vincent, Suriname, Trinidad.

## Other products available from Canadean Beverages include:

Global Beer Trends – Excel Report

Global Brewer Analyser – Excel Report

Global Beverage Forecasts

Quarterly Beverage Tracker

Consumer Trends in Beer, Cider & Pre-mixed Spirits

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