

TOP 40 BREWERIES



Mergers & acquisitions

There was continued activity on the mergers and acquisitions front. In Mexico, **Modelo** was taken over completely by **AB InBev**. In China, market consolidation increased sharply: **Carlsberg** won complete control of the brewery group **Chongqing**, and **China Resources Snow Breweries** (CRB) took over **Kingway**, while **AB InBev** acquired the **Siping Ginsber** brewery in spring 2014. As a result

of this takeover wave, the Chinese market is now also highly consolidated; together, five brewery groups (**CRB**, **Tsingtao**, **Ab Inbev China**, **Yanjing** and **Carlsberg**) have a combined market share of 68%. **Cervecería Regional** (Venezuela), **Warsteiner** (Germany) and **Lan Bei Beer Co., Ltd.** (China) have now entered the list of the world's top 40 breweries.

The world's 40 biggest brewery groups as at 31 December 2013

Ranking	Brewery	Country	Beer output 2013 in mill. hl	Share of world beer production
1	AB InBev	Belgium	399.0	20.2 %
2	SABMiller 1)	United Kingdom	187.4	9.5 %
3	Heineken	Netherlands	178.3	9.0 %
4	Carlsberg	Denmark	119.7	6.1 %
5	China Res. Snow Breweries (CRB)	China	117.1	5.9 %
6	Tsingtao Brewery Group	China	78.3	4.0 %
7	Molson-Coors	USA/Canada	59.7	3.0 %
8	Yanjing	China	57.1	2.9 %
9	Kirin	Japan	49.3	2.5 %
10	BGI/Groupe Castel	France	28.4	1.4 %
11	Efes Group	Turkey	25.5	1.3 %
12	Asahi	Japan	20.6	1.0 %
13	Gold Star	China	19.5	1.0 %
14	Diageo (Guinness)	Ireland	18.5	0.9 %
15	Polar	Venezuela	18.5	0.9 %
16	San Miguel Corporation	Philippines	16.3	0.8 %
17	Singha Corporation	Thailand	15.8	0.8 %
18	Petropolis	Brazil	15.0	0.8 %
19	Oriental Brewery	South Korea	13.4	0.7 %
20	Saigon Beverage Corp. (SABECO)	Vietnam	13.3	0.7 %
21	Grupo Mahou - San Miguel	Spain	12.0	0.6 %
22	Radeberger Gruppe	Germany	11.8	0.6 %
23	Pearl River	China	11.2	0.6 %
24	CCU	Chile	10.7	0.5 %
25	United Brewery	India	10.1	0.5 %
26	Oettinger	Germany	9.8	0.5 %
27	Damm	Spain	8.5	0.4 %
28	Hite	South Korea	8.1	0.4 %
29	Suntory	Japan	8.1	0.4 %
30	Obolon	Ukraine	7.8	0.4 %
31	Bitburger Braugruppe	Germany	7.5	0.4 %
32	Sapporo	Japan	6.6	0.3 %
33	Krombacher	Germany	6.6	0.3 %
34	Hanoi Beverage Corp. (HABECO)	Vietnam	6.2	0.3 %
35	Beer Thai (Chang)	Thailand	6.0	0.3 %
36	Brau Holding International	Germany	5.5	0.3 %
37	Cervecería Regional	Venezuela	5.2	0.3 %
38	SiPing Ginsber Brewery	China	4.9	0.2 %
39	Warsteiner	Germany	4.6	0.2 %
40	Lan Bei Beer Co., Ltd.	China	4.2	0.2 %
TOTAL			1,606.1	81.4 %
World beer production 2013			1,973.0	100.0 %

The data were taken from the brewers' own annual reports.

In other cases, the production volume had to be estimated after different sources had reported differing figures, or where no figures were available.

1) Not including the 57.4m hl from shareholding in China Resources Snow Breweries.