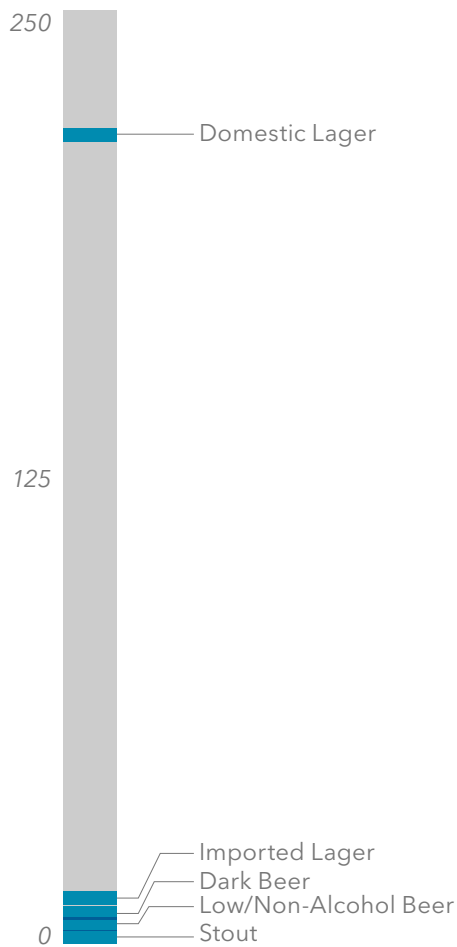


What Packaging for the Challenging Beer Market to 2018?

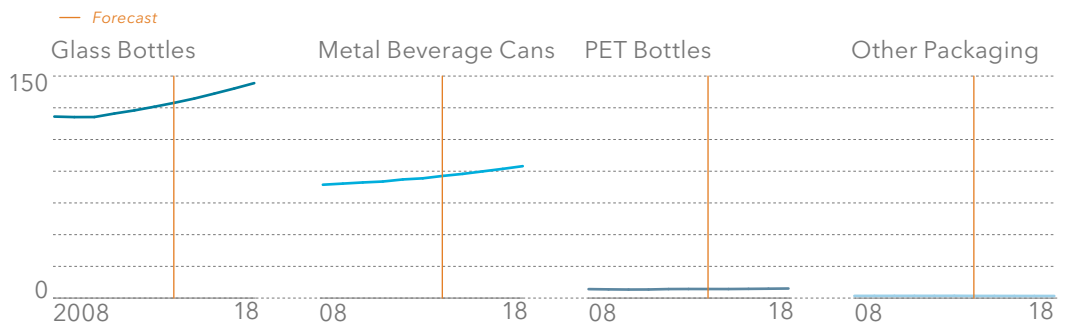
Domestic Lager Reigns

Beer Packaging by Category
2013 retail volume, billion units



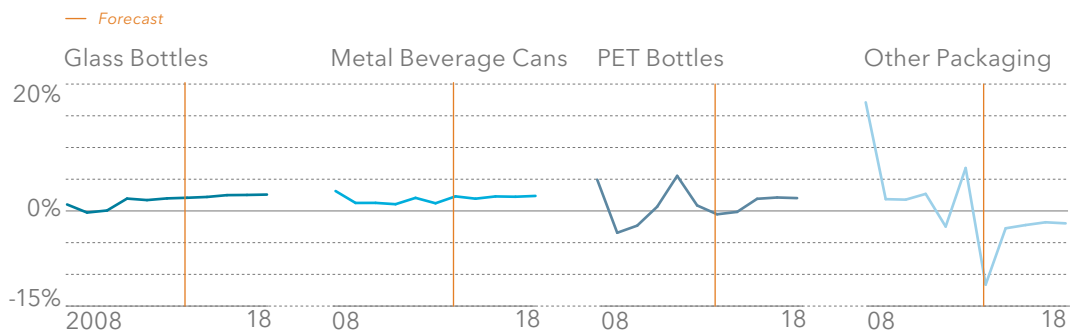
Glass Offers Best Prospects in Domestic Lager...

Packaging Volume by Type in Domestic Lager
retail volume, million units, 2008-2018

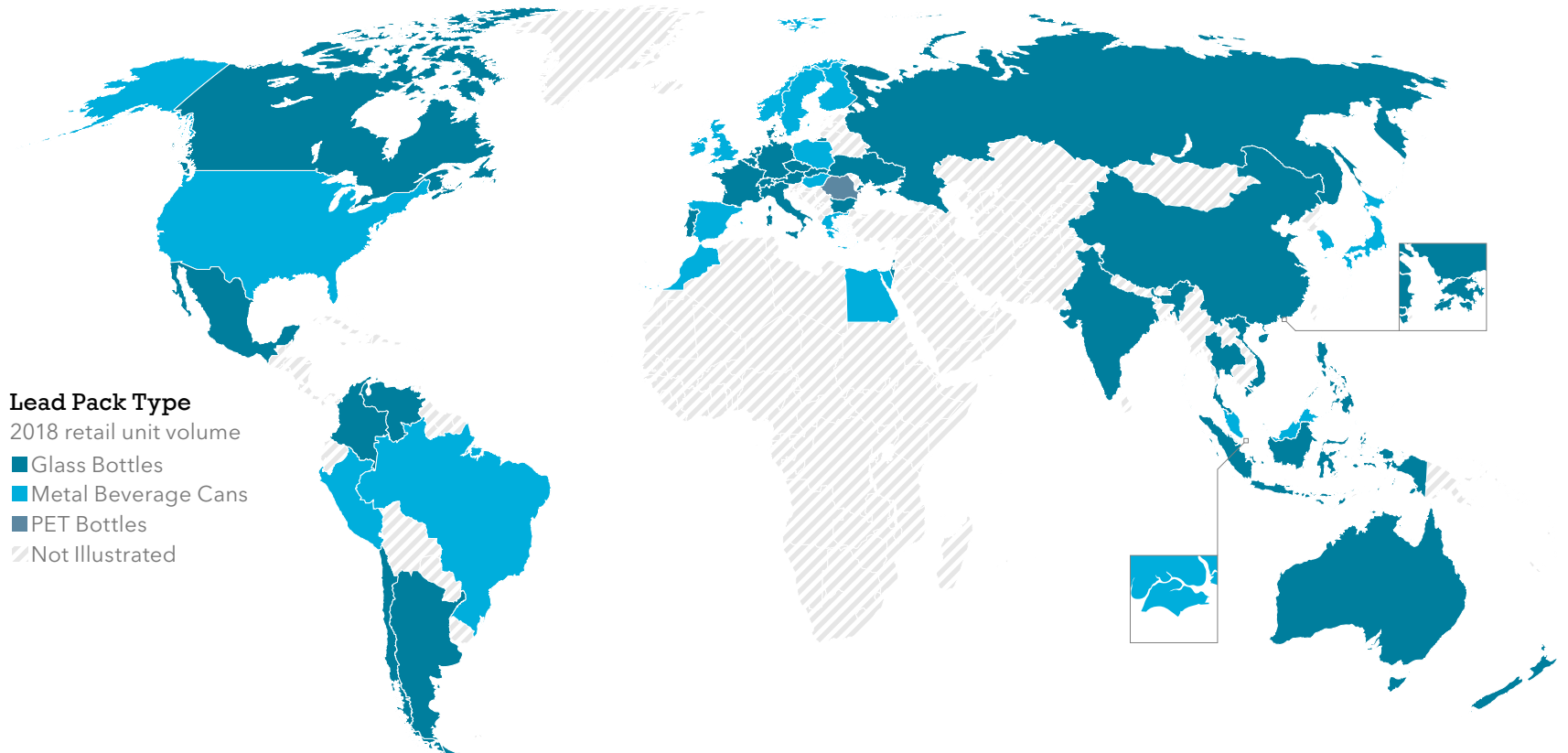


... but Metal Beverage Cans Prove to be a Challenge

Packaging Growth by Type in Domestic Lager
% year-on-year retail volume growth, 2008-2018



Pack Type Prevalence expected by country for Domestic Lager in 2018



Single-serve in India

In India, the third highest growth country over 2013-18 for beer packaging, 330ml glass bottles will see a faster unit volume increase than the standard 650ml size. Rapid urbanisation and developments in impulse retailing are seeing a shift from shared to individual consumption.

Cans Appeal in Brazil

While glass will lead in Latin America, Brazil will see the second largest volume growth for metal beverage cans in beer, globally. With a boost expected in 2014 as the country hosts the new FIFA World Cup, 350ml cans will drive growth ahead of 355ml and 600ml glass bottles.

Romania Values PET

In Romania, retail volume sales of domestic lager packaging are due to rise by 65 million units over 2013-2018. As Romanian consumers are primarily seeking value for money, PET bottles will gain volume share over glass with 500ml and 2-litre as lead formats.