

# BEER IN DENMARK

21 Dec 2011

## HEADLINES

- Beer declines by 2% in total volume terms to reach 373 million litres in 2011
- Beer continues to suffer due to shift to wine in 2011
- Beer prices at peak due to 2010's tax hike
- Intense price competition among producers and retailers, Carlsberg Danmark A/S dominates with 57% volume share
- Beer is predicted to display a total volume CAGR of -1% over the forecast period

### Market Size Beer - Denmark 2006 - 2011

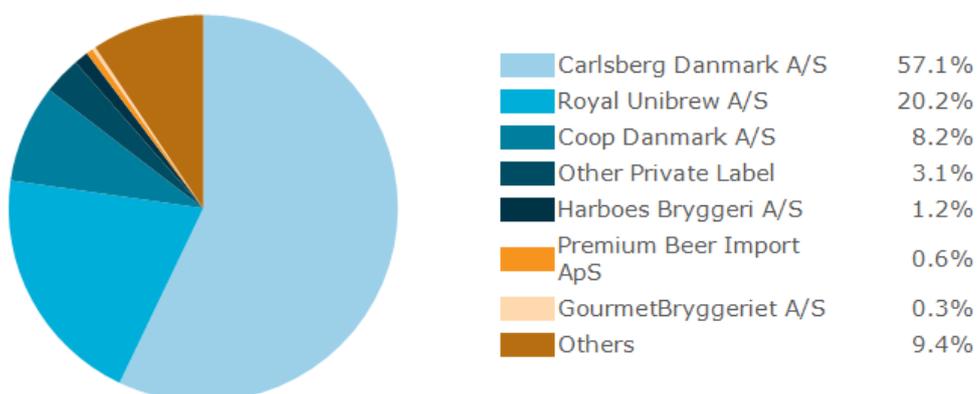


Source: Passport by Euromonitor International

## COMPETITIVE LANDSCAPE

- The category leader was Carlsberg Danmark A/S with 56% volume share in Danish beer in 2011. The most successful brands of Carlsberg Danmark A/S are Tuborg and Carlsberg with volume shares of 22% and 13%, respectively, in 2011. Carlsberg marginally lost share, due to the company focussing on product development and new product launches which targeted women aged 25-35 years old. The majority of Danes are not mature enough to try new unknown products and were not receptive to innovation, since they were still cautious due to the recession. Danes purchased what they already knew and felt safe in purchasing. The second biggest player in Danish beer was Royal Unibrew A/S with 20% volume share. The biggest brand of Royal Unibrew was Royal with 9% volume share. Royal Unibrew managed to retain its share, by focussing on strengthening relationships with its customers, improving its operational efficiency and optimising its capital resources. The third biggest player in Danish beer was Coop Danmark A/S with 7% volume share. This player gained marginal share during the last year due to private label and exclusive brand rights, which is a cheap and efficient solution in a crises-hit country.
- The biggest loser of the aforementioned leaders was Carlsberg, even though its loss was not that significant. The main reason for this was the unlucky and early timing of new product launches. Most Danes remained unreceptive to new innovations after the economic crisis; they followed their ingrained consumption patterns which worked very well. The biggest winner was Coop Danmark A/S, with a marginal gain in volume share. Its success laid in private label and exclusive brand rights, which provided consumers cheap products, which was an effective strategy given how price-sensitive consumers were after the crisis.

## Company Shares (by National Brand Owner) Beer - Denmark - Total Volume - % 2011



Source: Passport by Euromonitor International

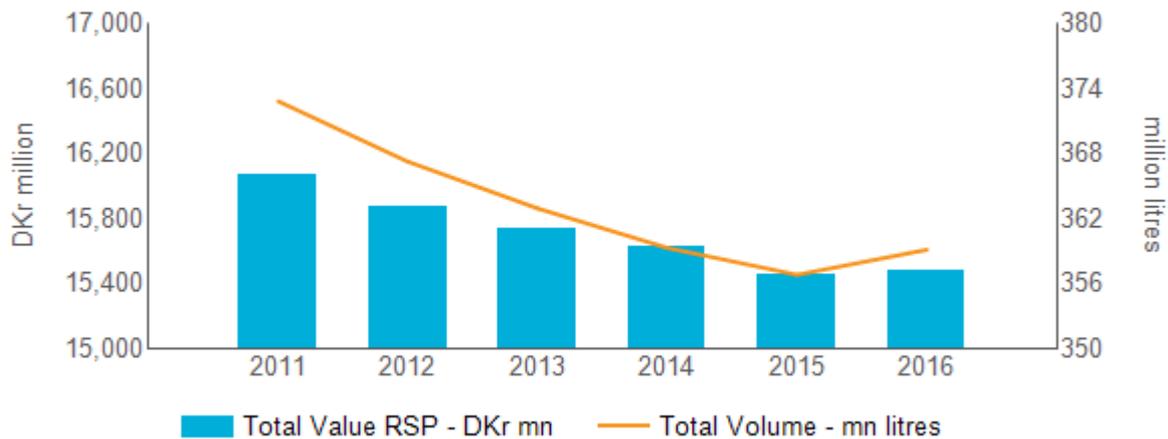
## NATIONAL BRAND OWNERS AND THEIR BRANDS

Company Name (NBO)	Brand (GBO)
Bryggeriet Vestfyen A/S	Vestfyen Pilsner (Bryggeriet Vestfyen A/S)
Carlsberg Danmark A/S	Carls Lager (Carlsberg A/S), Carls Special (Carlsberg A/S), Carlsberg Elephant (Carlsberg A/S), Carlsberg Light (Carlsberg A/S), Carlsberg Master Brew (Carlsberg A/S), Carlsberg Pilsner (Carlsberg A/S), Carlsberg Sort Guld (Carlsberg A/S), Jacobsen (Carlsberg A/S), Tuborg Classic (Carlsberg A/S), Tuborg Fine Festival (Carlsberg A/S), Tuborg Grøn (Carlsberg A/S), Tuborg Guld (Carlsberg A/S), Tuborg Påskebryg (Carlsberg A/S), Tuborg Super Light (Carlsberg A/S), Wiibroe Årgangsøl (Carlsberg A/S), Wiibroe Classic (Carlsberg A/S), Wiibroe Guld (Carlsberg A/S), Wiibroe Pilsner (Carlsberg A/S)
Coop Danmark A/S	1795 (Budejovicky Budvar as)
GourmetBryggeriet A/S	GourmetBryggeriet (Harboes Bryggeri A/S)
Harboes Bryggeri A/S	Harboe Guld (Harboes Bryggeri A/S), Harboe Julebryg (Harboes Bryggeri A/S), Harboe Light (Harboes Bryggeri A/S), Harboe Pilsner (Harboes Bryggeri A/S)
House of Beer A/S	Franziskaner (Anheuser-Busch InBev NV)
Royal Unibrew A/S	Albani (Royal Unibrew A/S), Albani Odense (Royal Unibrew A/S), Ceres (Royal Unibrew A/S), Ceres TOP (Royal Unibrew A/S), Faxe Pilsner (Royal Unibrew A/S), Heineken (Heineken NV), Maribo (Royal Unibrew A/S), Royal (Royal Unibrew A/S), Royal Brown Ale (Royal Unibrew A/S), Royal Classic Light (Royal Unibrew A/S), Royal Free (Royal Unibrew A/S), Thor (Royal Unibrew A/S)
Theo Brands A/S	Pilsner Urquell (SABMiller Plc)

Source: Passport by Euromonitor International

## FORECAST

### Market Size Beer - Denmark 2011 - 2016



Source: Passport by Euromonitor International

## DEFINITIONS AND METHODOLOGY

### Beer

An alcoholic drink usually brewed from malt, sugar, hops and water and fermented with yeast. Some beers are made by fermenting a cereal, especially barley, and therefore not flavoured by hops. Alcohol content for beer is varied – anything up to and over 14% abv (alcohol by volume), although 3.5%-5% is most common.

Beer is often loosely classified by the nature in which it is made:

Top fermented (ie ales, bitters, wheat beers, stouts, porters etc)

Bottom fermented (ie all lagers)

Note: pre-mixed beers such as beer/lemonade, beer/whisky or beer/tequila mixtures are excluded from the data. These are included in flavoured alcoholic beverages (FABs).

This is the aggregation of lager, dark beer, stout and LABs/NABs

### Methodology

This report is derived from Euromonitor International's Passport information system. Industry research is carried out by a global team of more than 600 in-country analysts and is based on a core set of research techniques:

- National-level desk research, company research and analysis, store checking, trade interviewing with national players and market analysis
- International-level desk research, multinational company research and analysis, trade interviewing with international players and market analysis