Passport

BEER IN VIETNAM

Euromonitor International

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BEER IN VIETNAM

HEADLINES

- Beer sees total volume growth of 13% to reach 2.6 billion litres in 2011
- Standard lager continues to be the largest and fastest-growing category thanks to further expansion of local players as well as new participation of many international players
- Unit price increases slightly in both off-trade and on-trade channels due to inflation
- Beer witnesses stiffer competition in 2011 as local players try to expand their presence into untapped market areas
- Beer is expected to reach 3.7 billion litres in 2016, growing at a total volume CAGR of 7%

TRENDS

- Over the review period, beer was regarded by Vietnamese consumers as a kind of necessity, either in business meetings or in informal gatherings of friends. Some consumers also had a habit of drinking beer during their meal to help them easily digest food. Hence, despite its slower growth compared to 2010, beer continued to see strong growth of 13% in total volume sales terms.
- Sales were driven by intensive expansion of key players to respond to increasing consumer demand. Local players such as Saigon Alcohol Beer & Beverages Corp (Sabeco) and Hanoi Alcohol Beer & Beverages Corp (Habeco) continuously built new brewery plants. Moreover, they also reached out to new markets. For example, Sabeco tried to expand into the northern parts of Vietnam and Habeco into the southern parts to increase their market shares. At the beginning of 2011, Sabeco celebrated its achievement of producing one billion litres of beer per year. This event proved that beer has very strong potential in Vietnam.
- Lager remained the dominant and only major type of beer in the market. Other types of beer, such as dark beer, stout and low-alcohol beer, were still negligible. The low presence of other types of beer was due to the fact that Vietnamese consumers were already acquainted with the taste of lager, and reluctant to try other kinds of beer. Other types were either too strong or too bitter for them. Low-alcohol beer recently gained favour among female consumers as they generally had a lower alcohol tolerance level than male consumers.
- In 2011, standard lager displayed the highest growth rates in both value and volume terms. The growth was fostered by rapid expansion of domestic players in terms of production facilities, such as bottling, brewery plants, and new product launches. An increase in income levels of Vietnamese consumers also contributed to healthy growth of standard lager as consumers were shifting from economy lager brands to standard or premium brands.
- The category saw two new brands from major players – Tiger Crystal from Vietnam Brewery in 2009 and 333 Premium from Sabeco in 2010. Both domestic and international players also made huge investments in public relations events and marketing activities to attract consumers. For example, in May 2011, Vietnam Brewery introduced the limited edition Heineken STR bottle. The event “Light up the light” was hosted at Bitexco Tower, the highest tower of Ho Chi Minh City, to signify the premium status of the brand Heineken.
- Inflation has raised input prices, including the price of malt, sugar and rice, which led to an increase in the unit price of beer. During special occasions like Lunar New Year, beer prices rose sharply and uncontrollably in response to increased demand.

- Men remained the main consumers of beer. In 2011, however, with the availability of light beer, the market also saw increasing demand from female consumers, in both on-trade and off-trade channels. In the past, beer drinking was traditionally perceived as a habit for men only. However, as consumers had more exposure to Western culture, the perception of drinking changed. People now considered it as a recreational drink suitable for both genders.
- The on-trade channel accounted for the major share of total volume sales. Thanks to the increasing income levels and busier lifestyles, Vietnamese people tended to eat out more often. Moreover, the foodservice industry saw big developments in terms of new outlets and revenue streams. All the above factors contributed to healthy growth of beer via the on-trade channel in the country.
- Glass bottles were popular within on-trade channels, where a deposit system was employed and food outlets paid a deposit for bottles. Metal beverage cans seemed to be more popular within off-trade channels as they were easier to store and transport.
- Draught beer was previously produced by unbranded manufacturers with doubtful quality. However, over the review period, on-trade channels saw increasing numbers of food outlets serving draught beer, originating from Germany, Belgium, or the Czech Republic. This draught beer was brewed in the food outlet, and was offered at a considerably higher price than normal beer. Although the sales of draught beer were still negligible in 2011, draught beer is expected see high growth rates over the forecast period.

PRODUCTION, IMPORTS AND EXPORTS

- Sabeco and Habeco accounted for a large share of sales in Vietnam. The two companies contributed greatly to the development of the beer industry in Vietnam. Their main focus was standard and economy lagers for domestic and export markets. Sabeco was the biggest player in beer in 2011. The company had a wide distribution network, especially in southern Vietnam. Sabeco put lots of effort and investment into several production facilities to cater for domestic and export markets. The company also tried to tap into the premium segment, with the launch of 333 Premium in 2010, to compete with other premium standard lagers.
- The biggest export markets for Vietnamese beers were Southern European countries, Taiwan, China, Japan and Australia. Beer manufacturers also tried to capture new markets, such as Southeast Asian countries like Thailand, Laos and Cambodia as well as Northern European countries. About 20% of local manufacturers' output was for overseas consumption.
- With regard to imported beer, brands from Australia, the US, the Czech Republic and Germany were among the most popular in Vietnam. Imported brands came with higher prices, thus catering to the premium segment of lager. Overall, domestic beer still accounted for very nearly 100% of sales in total volume terms. Although imported premium lager saw robust growth in 2011, the category remained minimal in terms of volume sales. Many Vietnamese consumers found that the prices of imported beer were too expensive, compared to domestic beer.

COMPETITIVE LANDSCAPE

- Sabeco continued to lead beer, holding a 48% share in volume terms in 2011. The company aggressively expanded its production facilities to further improve its leading position. In September 2010 Sabeco launched 333 Premium, positioned as a premium product as a response to the consumer trend of shifting to more high-end products. The product was widely distributed and sold in northern regions of the country. Other products like Saigon

Export, 333' export and Saigon Lager also enhanced their presence in both the southern regions and northern regions, thanks to an effective distribution network.

- Vietnam Brewery and Habeco hold the second and third positions, respectively. Habeco produced Hanoi beer, which was one of the most popular beer brands in the northern regions. Vietnam Brewery owned many popular domestic premium and standard beer brands. Its most notable brands were Heineken and Tiger. The three top players Sabeco, Vietnam Brewery and Habeco together hold more than 80% of volume sales of beer in 2011. All of them possessed very strong brand names, together with dynamic advertising and public relations activities, which helped them greatly to maintain their competitive position over the review period.
- In 2011, Habeco recorded the biggest increase thanks to its popular brand Hanoi in the northern region, including Hanoi and surrounding provinces. With the opening of its newest factory in Ba Ria-Vung Tau province, in January 2011, Habeco slowly expanded its market into the central and the southern parts. Toward the end of review period, Habeco started to introduce its products in supermarkets and restaurants to fight against Sabeco, the market leader in alcoholic drinks in the southern regions, for sales share.
- Beer was dominated by domestic brands, in all three segments of premium, standard and economy. The reason was the wide availability of domestic products and their affordable prices, even for premium products. For example, the average unit price of domestic premium brands was typically from one third to half the price of international premium brands. Moreover, consumers were already familiar with the taste of domestic brands and they were reluctant to try new tastes.
- Although only accounting for a minimal share of beer in Vietnam, international players still found the local beer market very promising. International brands coming to Vietnam mainly targeted affluent consumers. They mainly competed in the premium segment, with brands like Heineken, Carlsberg, San Miguel, Corona, Budweiser or Asahi. Imported brands being associated with status or prestige could be found in off-trade channels, but they were mostly consumed in bars and nightclubs. International brand owners usually ran extensive public relations activities and events to create consumer awareness for their brand name.
- In 2010, beer in Vietnam welcomed two new premium brands – Tiger Crystal and 333 Premium – in line with the premiumisation trend. Heineken also introduced its limited edition SRT bottle. The product was sold at a price of five to eight times more than the normal Heineken bottle. Although Heineken SRT was not widely sold, the launch event helped to further enhance the premium position of Heineken in Vietnam.
- Heineken STR was considered as the key packaging innovation in 2011. Its bottle was made from UV-sensitive ink illuminates. Therefore, it would reveal a spectacular sky filled with shooting stars in dark environments like a nightclub. Heineken STR was able to create a unique experience for an audience to enhance its premium position.
- The three price beer segments of beer aimed at various consumers and regions. Premium and standard beer manufacturers tended to focus on executing various marketing and public relations activities and expanding their retail network in urban areas where people were willing to pay a high price for quality. On the other hand, economy brand players normally concentrated on building their distribution system in rural areas and the outskirts of cities, where competition remained low and consumers were very price conscious.
- Private label was still in its introductory stage. In 2011, Big C, one of the major hypermarket chains, introduced more beer under its own private label WOW!Giá H?p D?n, which was offered at a price compatible with economy brands. This product affirmed Casino Guichard-Perrachon SA's ambition to diversify its private label to create its unique position to deal with the increasingly intense competition in the grocery retailing channel.

PROSPECTS

- Over the forecast period, in spite of some economic difficulties such as a high inflation rate and rising food and fuel prices, Vietnam's economy looked to have a promising future in 2011. As a result, Vietnamese consumers are enjoying higher disposable incomes and they have additional funds for non-necessary products like beer. Moreover, manufacturers are likely to increase their marketing campaigns and advertisements to stimulate consumer demand for alcoholic beverages. Together with a young population, the Vietnamese market has a lot of potential to see strong growth.
- Beer is expected to record a CAGR of 7% in total volume terms over the forecast period. Domestic players are likely to build more brewery plants to satisfy increasing demand, while international players are entering the Vietnamese market with more brands and active marketing activities. Hence, more sophisticated consumer demand for beer products will be witnessed.
- There might be a number of consumers shifting to spirits or wine as they believe that spirits or wine are better for the health. Nonetheless, this does not pose a significant threat to growth of beer as beer has various choices in term of brands, prices and sizes. Furthermore, beer has a low alcohol content, being suitable for both men and women. Therefore, beer will continue to be more popular among Vietnamese consumers over the forecast period.
- Lager will still be the major category in beer as manufacturers have little interest in investing in other types of beer. This is due to the fact that Vietnamese consumers are quite reluctant to try other categories such as light beer. Nonetheless, manufacturers might introduce new kinds of beer, especially low/non-alcohol beer, to respond to increasing demand from the female population.
- As manufacturers are likely to increase their production to respond to greater demand, manufacturers will benefit more from economies of scale. Hence, unit price is expected to fall slightly over the forecast period in constant value terms. However, this trend might change if more new premium international players participate in the local beer industry. The premiumisation trend will bring up average beer prices if such products perform well.
- Companies are expected to continue to enhance brand awareness and sales by executing various marketing activities and public relation events to boost brand awareness and sales. Typically, their advertisements are related to special events and celebrations, when demand for beer rises rapidly, such as New Year, Christmas, or Lunar New Year. In addition, companies will also strive to strengthen their distribution networks, as they play an important role in bringing the products to consumers.
- The on-trade is expected to perform well over the forecast period. With busier lifestyles and rapid development of the consumer foodservice industry, people are expected to spend more on dining out, which helps to boost the level of beer consumption in these channels.

CATEGORY BACKGROUND

Lager Price Band Methodology

- Premium lagers, priced from VND35,000 per litre and above, were usually consumed by middle-to-high-income consumers in urban areas. Most of the brands, especially imported brands, such as Carlsberg or Pilsner Urquell could only be found in specialist shops or in on-trade channels. These brands usually had very limited distribution in regular channels such as supermarkets/hypermarkets or independent retailers. The only exception was Heineken, which had a presence throughout the country, even in some suburban areas.

- Standard lager, priced from VND21,000 to VND35,000 per litre, consisted of popular brands of the three biggest breweries in the country, namely Habeco, Sabeco and Vietnam Brewery. Due to its affordable price, it was widely present in both rural and urban areas.
- Economy lager, priced from VND20,000 and below per litre, consisted of the lower-end brands, usually "bia hoi", which was a kind of Vietnamese fresh beer. Except for Bia Hoi Hà N?i, which was made by Habeco, "bia hoi" is mostly home-brewed. It was available in small independent restaurants in suburban and rural areas, due to its affordable price.

Summary 1 Lager by Price Band 2011

Category	Price range per litre [VND]
Premium	35,000-50,000
Standard	21,000-35,000
Economy	16,000-20,000

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note: Price bands for lager are based primarily on price, but positioning and packaging are other factors that are considered in classification

CATEGORY DATA

Table 1 Sales of Beer by Category: Total Volume 2006-2011

million litres

	2006	2007	2008	2009	2010	2011
Dark Beer	-	-	-	-	-	-
Lager	1,334.2	1,547.3	1,752.5	2,021.7	2,303.0	2,595.4
- Premium Lager	151.6	164.5	179.4	194.0	209.5	225.7
-- Domestic Premium Lager	151.2	164.1	178.9	193.5	208.9	225.2
-- Imported Premium Lager	0.4	0.5	0.5	0.5	0.5	0.5
- Standard Lager	635.5	768.2	912.0	1,157.5	1,397.6	1,650.9
-- Domestic Standard Lager	635.5	768.2	912.0	1,157.5	1,397.6	1,650.9
-- Imported Standard Lager	-	-	-	-	-	-
- Economy Lager	547.1	614.6	661.2	670.2	696.0	718.8
-- Domestic Economy Lager	547.1	614.6	661.2	670.2	696.0	718.8
-- Imported Economy Lager	-	-	-	-	-	-
Low/Non- Alcohol Beer	-	-	-	-	-	-
- Low Alcohol Beer	-	-	-	-	-	-
- Non-Alcoholic Beer	-	-	-	-	-	-
Stout	-	-	-	-	-	-
Beer	1,334.2	1,547.3	1,752.5	2,021.7	2,303.0	2,595.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Beer by Category: Total Value 2006-2011

VND billion

	2006	2007	2008	2009	2010	2011
Dark Beer	-	-	-	-	-	-
Lager	42,858.9	50,736.7	58,342.8	68,954.1	80,097.1	95,829.9
- Premium Lager	6,289.2	6,922.5	7,683.0	8,661.4	9,705.7	11,170.7
-- Domestic Premium Lager	6,242.5	6,872.9	7,629.9	8,604.2	9,643.9	11,100.7
-- Imported Premium Lager	46.6	49.6	53.1	57.2	61.9	70.0
- Standard Lager	20,557.4	25,483.2	30,749.2	39,817.7	48,809.9	61,340.6
-- Domestic Standard Lager	20,557.4	25,483.2	30,749.2	39,817.7	48,809.9	61,340.6
-- Imported Standard Lager	-	-	-	-	-	-
- Economy Lager	16,012.2	18,331.0	19,910.6	20,475.0	21,581.4	23,318.7
-- Domestic Economy Lager	16,012.2	18,331.0	19,910.6	20,475.0	21,581.4	23,318.7
-- Imported Economy Lager	-	-	-	-	-	-
Low/Non- Alcohol Beer	-	-	-	-	-	-
- Low Alcohol Beer	-	-	-	-	-	-
- Non-Alcoholic Beer	-	-	-	-	-	-
Stout	-	-	-	-	-	-
Beer	42,858.9	50,736.7	58,342.8	68,954.1	80,097.1	95,829.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Beer by Category: % Total Volume Growth 2006-2011

% total volume growth

	2010/11	2006-11 CAGR	2006/11 Total
Dark Beer	-	-	-
Lager	12.7	14.2	94.5
- Premium Lager	7.8	8.3	48.9
-- Domestic Premium Lager	7.8	8.3	49.0
-- Imported Premium Lager	4.7	4.5	24.4
- Standard Lager	18.1	21.0	159.8
-- Domestic Standard Lager	18.1	21.0	159.8
-- Imported Standard Lager	-	-	-
- Economy Lager	3.3	5.6	31.4
-- Domestic Economy Lager	3.3	5.6	31.4
-- Imported Economy Lager	-	-	-
Low/Non- Alcohol Beer	-	-	-
- Low Alcohol Beer	-	-	-
- Non-Alcoholic Beer	-	-	-
Stout	-	-	-
Beer	12.7	14.2	94.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Beer by Category: % Total Value Growth 2006-2011

% local currency, current value growth

	2010/11	2006-11 CAGR	2006/11 Total
Dark Beer	-	-	-
Lager	19.6	17.5	123.6
- Premium Lager	15.1	12.2	77.6
-- Domestic Premium Lager	15.1	12.2	77.8
-- Imported Premium Lager	13.2	8.5	50.1

- Standard Lager	25.7	24.4	198.4
-- Domestic Standard Lager	25.7	24.4	198.4
-- Imported Standard Lager	-	-	-
- Economy Lager	8.1	7.8	45.6
-- Domestic Economy Lager	8.1	7.8	45.6
-- Imported Economy Lager	-	-	-
Low/Non- Alcohol Beer	-	-	-
- Low Alcohol Beer	-	-	-
- Non-Alcoholic Beer	-	-	-
Stout	-	-	-
Beer	19.6	17.5	123.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Beer by On-trade vs Off-trade Split: Volume 2006-2011

million litres

	2006	2007	2008	2009	2010	2011
Off-trade	373.8	429.6	482.5	548.9	618.1	693.7
On-trade	960.4	1,117.7	1,270.1	1,472.8	1,685.0	1,901.7
Total	1,334.2	1,547.3	1,752.5	2,021.7	2,303.0	2,595.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Beer by On-trade vs Off-trade Split: Value 2006-2011

VND billion

	2006	2007	2008	2009	2010	2011
Off-trade	8,232.9	9,481.5	10,717.0	12,359.9	14,068.3	16,537.1
On-trade	34,626.0	41,255.2	47,625.8	56,594.2	66,028.8	79,292.8
Total	42,858.9	50,736.7	58,342.8	68,954.1	80,097.1	95,829.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Beer by On-trade vs Off-trade Split: % Volume Growth 2006-2011

% volume growth

	2010/11	2006-11 CAGR	2006/11 TOTAL
Off-trade	12.2	13.2	85.6
On-trade	12.9	14.6	98.0
Total	12.7	14.2	94.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Beer by On-trade vs Off-trade Split: % Value Growth 2006-2011

% current value growth

	2010/11	2006-11 CAGR	2006/11 TOTAL
Off-trade	17.5	15.0	100.9

On-trade	20.1	18.0	129.0
Total	19.6	17.5	123.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Beer: Production, Imports and Exports: Total Volume 2005-2010

Million litres

	2005	2006	2007	2008	2009	2010
Beer – Production	1,460.6	1,547.2	1,655.3	1,847.2	2,007.5	2,377.2
Beer – Apparent consumption	1,458.0	1,545.8	1,649.8	1,843.0	-	-

Source: GTIS, Euromonitor International
Note: '-' indicates data not available

Table 10 Beer Imports by Country of Origin: Total Volume 2005-2010

million litres

	2005	2006	2007	2008	2009	2010
Beer – Malaysia	0.3	0.1	0.3	0.2	-	-
Beer – Mexico	0.1	0.1	0.2	0.3	-	-
Beer – Greece	-	-	0.0	-	-	-
Beer – Hong Kong	0.0	0.1	0.2	1.1	-	-
Beer – Italy	-	-	-	0.1	-	-
Beer – Laos	0.1	0.1	0.2	0.2	-	-
Beer – Belgium	0.0	0.0	0.1	0.4	-	-
Beer – Brunei Darussalam	-	0.0	-	0.8	-	-
Beer – China	0.0	0.1	0.2	0.1	-	-
Beer – Czech Republic	0.0	0.1	0.1	0.1	-	-
Beer – Denmark	-	0.0	-	0.0	-	-
Beer – France	0.0	0.0	0.0	0.0	-	-
Beer – Germany	0.1	0.1	0.1	0.4	-	-
Beer – Morocco	-	-	-	0.0	-	-
Beer – Ukraine	-	-	0.1	-	-	-
Beer – Thailand	0.1	0.1	0.0	0.1	-	-
Beer – Singapore	0.3	2.0	1.3	2.4	-	-
Beer – Philippines	-	-	-	0.3	-	-
Beer – Pakistan	-	0.1	0.1	-	-	-
Beer – Panama	-	-	-	0.2	-	-
Beer – Not Determined	-	-	0.0	-	-	-
Beer – Netherlands	0.0	0.1	0.8	7.8	-	-
Beer – United Kingdom	0.0	-	0.0	0.1	-	-
Beer – United Arab Emirates	-	-	-	0.0	-	-
Beer – US	0.0	0.1	0.0	0.4	-	-
Beer – Others	0.0	0.1	0.2	0.1	-	-
Beer – Total	1.2	3.2	4.0	15.0	-	-

Source: GTIS, Euromonitor International
Note: '-' indicates data not available

Table 11 Beer Imports by Country of Origin: Total Value 2005-2010

VND million

	2005	2006	2007	2008	2009	2010
Beer – Morocco	-	-	-	551.2	-	-
Beer – Netherlands	112.4	1,865.5	14,628.8	143,460.3	-	-
Beer – Malaysia	4,642.6	1,333.8	5,990.3	2,957.9	-	-
Beer – Mexico	1,346.6	1,559.6	2,799.3	5,189.0	-	-
Beer – Greece	-	-	847.1	-	-	-
Beer – Hong Kong	425.1	1,105.6	3,725.9	20,031.3	-	-
Beer – Italy	-	-	-	1,240.1	-	-
Beer – Laos	1,620.0	2,135.2	3,623.7	3,501.4	-	-
Beer – Belgium	50.5	169.2	1,256.3	7,760.7	-	-
Beer – Brunei Darussalam	-	403.1	-	14,052.3	-	-
Beer – China	321.8	2,103.5	3,354.7	1,911.0	-	-
Beer – Czech Republic	389.2	930.5	2,122.3	2,485.6	-	-
Beer – Denmark	-	9.1	-	585.6	-	-
Beer – France	263.9	270.0	528.3	664.8	-	-
Beer – Germany	1,037.1	1,390.3	2,341.9	6,595.7	-	-
Beer – Not Determined	-	-	630.1	-	-	-
Beer – Pakistan	-	880.4	1,769.4	-	-	-
Beer – Panama	-	-	-	3,795.4	-	-
Beer – Philippines	-	-	-	6,185.0	-	-
Beer – Ukraine	-	-	1,200.7	-	-	-
Beer – United Arab Emirates	-	-	-	668.9	-	-
Beer – Singapore	5,128.8	30,824.4	22,374.4	44,091.6	-	-
Beer – Thailand	1,047.3	836.3	245.7	1,086.6	-	-
Beer – US	314.9	1,326.3	176.4	6,625.5	-	-
Beer – United Kingdom	59.7	-	671.2	2,528.3	-	-
Beer – Others	604.5	1,375.3	2,760.2	972.3	-	-
Beer – Total	17,364.5	48,518.3	71,046.9	276,940.6	-	-

Source: GTIS, Euromonitor International
Note: '-' indicates data not available

Table 12 Beer Exports by Country of Destination: Total Volume 2005-2010

million litres

	2005	2006	2007	2008	2009	2010
Beer – France	0.1	0.2	0.2	0.3	-	-
Beer – Canada	0.0	0.1	0.0	0.0	-	-
Beer – India	0.0	-	0.1	-	-	-
Beer – Indonesia	0.1	0.5	1.0	0.9	-	-
Beer – Hong Kong	0.0	0.0	0.1	0.1	-	-
Beer – Bosnia & Herzegovina	0.0	0.1	-	-	-	-
Beer – Cambodia	1.0	1.2	4.3	15.2	-	-
Beer – Australia	0.1	0.1	0.1	0.1	-	-
Beer – Bangladesh	0.2	0.2	0.1	0.1	-	-
Beer – United Arab Emirates	0.3	0.3	0.2	0.1	-	-
Beer – Ukraine	-	-	-	0.0	-	-
Beer – Thailand	0.1	0.2	0.4	0.0	-	-
Beer – Singapore	0.2	0.2	0.2	0.2	-	-
Beer – US	0.3	0.5	0.5	0.3	-	-
Beer – United Kingdom	0.1	0.1	0.1	0.1	-	-
Beer – Laos	-	0.0	0.0	0.1	-	-
Beer – Malaysia	-	0.0	0.0	0.1	-	-
Beer – Korea, South	0.0	0.0	0.1	0.1	-	-
Beer – Japan	0.4	0.3	0.3	0.9	-	-

Beer – New Zealand	0.1	-	-	-	-	-
Beer – Netherlands	0.1	0.1	0.1	0.1	-	-
Beer – Russia	0.0	0.0	0.1	-	-	-
Beer – Papua New Guinea	-	-	1.4	-	-	-
Beer – Pakistan	0.3	0.1	-	-	-	-
Beer – Other Asia, N.E.S.	0.2	0.1	0.1	0.2	-	-
Beer – Other Asia, N.E.S.	0.2	0.1	0.1	0.2	-	-
Beer – Others	0.1	0.2	0.3	0.2	-	-
Beer – Total	3.7	4.6	9.5	19.1	-	-

Source: GTIS, Euromonitor International
Note: '-' indicates data not available

Table 13 Beer Exports by Country of Destination: Total Value 2005-2010

VND million

	2005	2006	2007	2008	2009	2010
Beer – Netherlands	917.9	694.2	898.2	1,377.0	-	-
Beer – New Zealand	762.8	-	-	-	-	-
Beer – Papua New Guinea	-	-	19,927.2	-	-	-
Beer – Russia	197.4	99.0	881.7	-	-	-
Beer – Singapore	2,224.6	2,294.8	3,248.9	3,388.2	-	-
Beer – Thailand	1,828.0	2,999.1	5,467.0	680.8	-	-
Beer – United Kingdom	856.3	1,318.0	1,114.6	1,363.9	-	-
Beer – US	3,729.8	6,509.7	6,546.5	3,957.2	-	-
Beer – United Arab Emirates	4,055.1	3,913.2	2,835.9	1,816.9	-	-
Beer – Ukraine	-	-	-	729.8	-	-
Beer – Bangladesh	2,932.2	2,999.5	1,018.5	867.8	-	-
Beer – Australia	650.0	818.0	758.0	899.9	-	-
Beer – Canada	326.0	1,016.1	420.5	609.9	-	-
Beer – Cambodia	12,652.1	15,266.6	61,368.2	223,485.0	-	-
Beer – Bosnia & Herzegovina	144.5	780.8	-	-	-	-
Beer – France	942.1	1,938.4	2,982.9	4,474.8	-	-
Beer – Korea, South	51.4	455.8	1,070.6	1,158.7	-	-
Beer – Laos	-	89.2	421.3	1,182.4	-	-
Beer – Malaysia	-	128.9	112.4	765.9	-	-
Beer – Hong Kong	118.0	308.5	1,017.9	1,072.9	-	-
Beer – India	424.9	-	753.3	-	-	-
Beer – Indonesia	1,342.8	6,771.3	13,517.7	13,581.2	-	-
Beer – Japan	5,653.7	4,433.9	4,212.7	13,345.8	-	-
Beer – Pakistan	3,693.5	1,669.3	-	-	-	-
Beer – Other Asia, N.E.S.	2,272.7	1,603.8	1,719.7	2,861.8	-	-
Beer – Other Asia, N.E.S.	2,272.7	1,603.8	1,719.7	2,861.8	-	-
Beer – Others	1,855.0	2,800.7	4,365.8	2,841.9	-	-
Beer – Total	47,630.7	58,908.9	134,659.5	280,461.6	-	-

Source: GTIS, Euromonitor International
Note: '-' indicates data not available

Table 14 Company Shares of Beer by National Brand Owner 2007-2011

% total volume

Company	2007	2008	2009	2010	2011
Saigon Alcohol Beer & Beverages Corp (Sabeco)	42.4	44.2	44.9	45.4	47.5

Vietnam Brewery Ltd	21.1	20.4	19.3	18.8	18.2
Hanoi Alcohol Beer & Beverages Corp (Habeco)	14.2	13.8	15.1	16.1	17.3
Hue Brewery Ltd - HBL	6.8	7.4	7.8	7.9	7.8
Thanh Hoa Beer JSC	2.1	2.1	2.2	2.1	2.1
South East Asia Brewery Ltd	3.7	3.1	2.6	2.3	1.4
San Miguel Brewery Vietnam Ltd	0.8	0.8	0.7	0.6	0.5
Dong Xuan Liquor Co Ltd	1.0	0.9	0.7	0.6	0.5
Foster's Vietnam Co	-	-	-	-	-
Hanoi Brewery Co	-	-	-	-	-
Saigon Brewery Co	-	-	-	-	-
Others	8.0	7.4	6.7	6.0	4.7
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Company Shares of Beer by Global Brand Owner 2007-2011

% total volume

Company	2007	2008	2009	2010	2011
Saigon Alcohol Beer & Beverages Corp (Sabeco)	42.4	44.2	44.9	45.4	47.5
Hanoi Alcohol Beer & Beverages Corp (Habeco)	16.3	15.8	17.3	18.3	19.4
Carlsberg A/S	10.5	10.5	10.3	10.2	9.2
Heineken NV	8.8	8.7	8.4	8.1	7.7
SABMiller Plc	0.0	0.0	0.0	0.0	6.4
Asia Pacific Breweries Ltd	4.6	4.3	3.9	3.9	4.0
San Miguel Brewery Inc	-	-	0.7	0.6	0.5
Oetker-Gruppe	1.0	0.9	0.7	0.6	0.5
Foster's Group Ltd	7.7	7.4	7.1	6.8	-
San Miguel Corp	0.8	0.8	-	-	-
Radeberger Gruppe KG	-	-	-	-	-
Vietnam Alcohol Beer & Beverages Corp	-	-	-	-	-
Others	8.0	7.4	6.7	6.0	4.7
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Brand Shares of Beer 2008-2011

% total volume

Brand (Global Brand Owner)	Company	2008	2009	2010	2011
Saigon Export	Saigon Alcohol Beer & Beverages Corp (Sabeco)	16.6	19.8	21.7	24.0
Hanoi	Hanoi Alcohol Beer & Beverages Corp (Habeco)	12.0	13.4	14.6	15.8
333' export	Saigon Alcohol Beer & Beverages Corp (Sabeco)	10.0	12.1	13.0	14.4
Saigon Lager	Saigon Alcohol Beer &	16.9	12.4	10.1	8.4

	Beverages Corp (Sabeco)				
Heineken (Heineken NV)	Vietnam Brewery Ltd	8.7	8.4	8.1	7.7
Huda (Carlsberg A/S)	Hue Brewery Ltd - HBL	5.3	5.7	5.9	5.8
Tiger (Asia Pacific Breweries Ltd)	Vietnam Brewery Ltd	4.0	3.6	3.6	3.8
Larue (SABMiller Plc)	Vietnam Brewery Ltd	-	-	-	3.0
Foster's (SABMiller Plc)	Vietnam Brewery Ltd	-	-	-	2.3
Thanh Hoa (Hanoi Alcohol Beer & Beverages Corp (Habeco))	Thanh Hoa Beer JSC	2.1	2.2	2.1	2.1
Larue (Foster's Group Ltd)	Vietnam Brewery Ltd	3.0	3.0	3.1	-
Foster's (Foster's Group Ltd)	Vietnam Brewery Ltd	3.3	3.0	2.7	-
Others	Others	18.1	16.5	15.1	12.5
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Forecast Sales of Beer by Category: Total Volume 2011-2016

million litres

	2011	2012	2013	2014	2015	2016
Dark Beer	-	-	-	-	-	-
Lager	2,595.4	2,852.5	3,079.2	3,296.8	3,505.3	3,700.6
- Premium Lager	225.7	242.4	258.8	275.6	292.8	310.3
-- Domestic Premium Lager	225.2	241.8	258.2	275.0	292.1	309.6
-- Imported Premium Lager	0.5	0.6	0.6	0.6	0.7	0.7
- Standard Lager	1,650.9	1,869.8	2,061.6	2,247.1	2,426.9	2,596.8
-- Domestic Standard Lager	1,650.9	1,869.8	2,061.6	2,247.1	2,426.9	2,596.8
-- Imported Standard Lager	-	-	-	-	-	-
- Economy Lager	718.8	740.3	758.8	774.0	785.6	793.5
-- Domestic Economy Lager	718.8	740.3	758.8	774.0	785.6	793.5
-- Imported Economy Lager	-	-	-	-	-	-
Low/Non- Alcohol Beer	-	-	-	-	-	-
- Low Alcohol Beer	-	-	-	-	-	-
- Non-Alcoholic Beer	-	-	-	-	-	-
Stout	-	-	-	-	-	-
Beer	2,595.4	2,852.5	3,079.2	3,296.8	3,505.3	3,700.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Beer by Category: Total Value 2011-2016

VND billion

	2011	2012	2013	2014	2015	2016
Dark Beer	-	-	-	-	-	-
Lager	95,829.9	102,778.1	109,085.9	115,120.8	121,146.7	127,113.6
- Premium Lager	11,170.7	11,706.4	12,350.1	13,090.8	13,941.4	14,917.0
-- Domestic Premium Lager	11,100.7	11,634.1	12,274.0	13,010.4	13,856.1	14,826.0

-- Imported Premium Lager	70.0	72.3	76.1	80.4	85.3	91.0
- Standard Lager	61,340.6	67,524.2	72,980.9	78,089.6	83,101.8	87,953.1
-- Domestic Standard Lager	61,340.6	67,524.2	72,980.9	78,089.6	83,101.8	87,953.1
-- Imported Standard Lager	-	-	-	-	-	-
- Economy Lager	23,318.7	23,547.5	23,754.9	23,940.4	24,103.5	24,243.5
-- Domestic Economy Lager	23,318.7	23,547.5	23,754.9	23,940.4	24,103.5	24,243.5
-- Imported Economy Lager	-	-	-	-	-	-
Low/Non- Alcohol Beer	-	-	-	-	-	-
- Low Alcohol Beer	-	-	-	-	-	-
- Non-Alcoholic Beer	-	-	-	-	-	-
Stout	-	-	-	-	-	-
Beer	95,829.9	102,778.1	109,085.9	115,120.8	121,146.7	127,113.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 19 Forecast Sales of Beer by Category: % Total Volume Growth 2011-2016

% total volume growth

	2015/16	2011-16 CAGR	2011/16 Total
Dark Beer	-	-	-
Lager	5.6	7.4	42.6
- Premium Lager	6.0	6.6	37.5
-- Domestic Premium Lager	6.0	6.6	37.5
-- Imported Premium Lager	6.8	5.9	33.1
- Standard Lager	7.0	9.5	57.3
-- Domestic Standard Lager	7.0	9.5	57.3
-- Imported Standard Lager	-	-	-
- Economy Lager	1.0	2.0	10.4
-- Domestic Economy Lager	1.0	2.0	10.4
-- Imported Economy Lager	-	-	-
Low/Non- Alcohol Beer	-	-	-
- Low Alcohol Beer	-	-	-
- Non-Alcoholic Beer	-	-	-
Stout	-	-	-
Beer	5.6	7.4	42.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Beer by Category: % Total Value Growth 2011-2016

% local currency, constant value growth

	2011-16 CAGR	2011/16 TOTAL
Dark Beer	-	-
Lager	5.8	32.6
- Premium Lager	6.0	33.5
-- Domestic Premium Lager	6.0	33.6
-- Imported Premium Lager	5.4	30.0
- Standard Lager	7.5	43.4
-- Domestic Standard Lager	7.5	43.4
-- Imported Standard Lager	-	-
- Economy Lager	0.8	4.0
-- Domestic Economy Lager	0.8	4.0
-- Imported Economy Lager	-	-

Low/Non- Alcohol Beer	-	-
- Low Alcohol Beer	-	-
- Non-Alcoholic Beer	-	-
Stout	-	-
Beer	5.8	32.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources