
interbrau
Birra per Passione!
padova
italy
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MILAN
VENICE
PADUA
TURIN
BOLOGNA
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SANDRO VECCHIATO

52
Married
2 daughters

- 1980 - he enters the father's company together with his brother Michele
- 1982 - beginning of import and distribution on the Italian territory of worldwide great Beer Brands

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STAFF: 45 PEOPLE

SALES-STAFF: 16 SALES REPRESENTATIVES

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EXPORT

BENITO UNTERWEGER

- •GERMANY
- •SWITZERLAND
- •AUSTRIA

GIULIO TEMPORIN

- •UNITED KINGDOM
- •BELGIUM
- •HOLLAND
- •DANEMARK
- •SWEDEN
- •NORWAY
- •FRANCE

SENI PEGAN

- • EX-JUGOSLAVIA
- •BULGARIA
- •ROMANIA
- •RUSSIA

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GLI ALTRI REPARTI

- MARKETING & COMMUNICATION: 2 employees
- ADMINISTRATIVE: 5 employees
- LOGISTIC DEPARTMENT: 5 employees
- TECHNICAL AND SECURITY: 2 employees
- COMMERCIAL DIVISION: 4 employees
- WAREHOUSE: 8 employees in outsourcing

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•TURN-OVER 2010: $ 29.000.000 (estimate)

•ONLY BEERS SOLD

•ONLY SPECIALTIES

•2010 HL 105.000 (estimation)

- ✓ ON-TRADE hl 98,87%
- ✓ OFF-TRADE hl 1,13% began in 2009

•KEG PROPERTY: 49.000 (20 and 30 liters)

•PACKAGING SOLD:

✓ DRAUGHT 78,15 %	Italian average 15%
✓GLASS RETURNABLE 1,61 %	Italian average 7,75%
✓GLASS NON RETURNABLE 19,94 %	Italian average 69,3%
✓CANS 0 %	Italian average 8%

•CONNECTED COMPANY: GRANDI BIRRE ITALIA

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OUR SALES

SALES

NORTH-WEST: 34,48%

NORTH-EAST: 33,33%

CENTER: 17,42%

SOUTH: 14,77%

POPULATION

NORTH: 45,10%

CENTER: 24,22%

SOUTH: 30,63%

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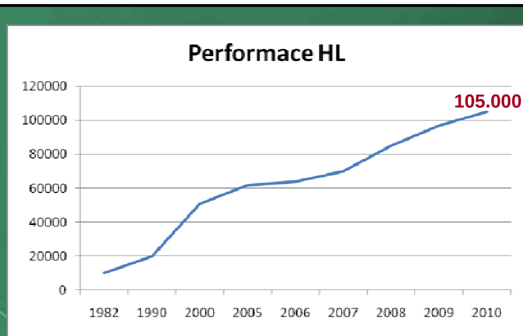

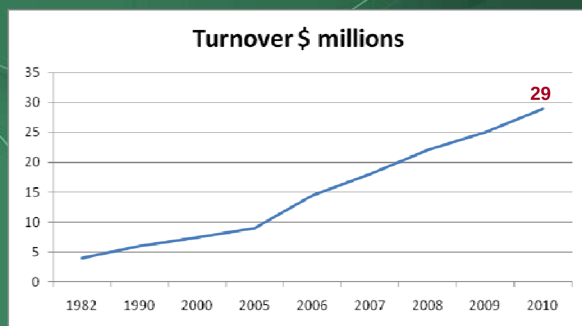

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Created for the distribution directly to the Points of Sale in strategic areas

TURN-OVER 2010: $ 16.000.000

FACILITIES:

PADUA: 7 employees

VICENZA: 10 employees

VERONA: 9 employees

ROMA: 12 employees

FUTURE COMING
BRANCHES IN NORTH ITALY

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ITALIAN'S FAVOURITES

- 30 millions of Italian people drink beer
  - 16 millions of Italian people drink beer once a week or more
    - In one year + 148% beer consumers outside home

BEVERAGE CONSUMPTION – OUTSIDE HOME MEALS

	Year 2002	Year 2009
Wine	38,4%	18,0%
Beer	22,7%	20,6%
Water	35,0%	56,7%
Others	3,9%	4,7%

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CRAFTBEER CONSUMPTION IN ITALY

We haven't any statistics available that show the subdivision beetween mainstream and craft beers: the phenomenon is located around the production areas and only 15-20 labels are distributed on the national territory.

It is still a young movement.

The budget dedicated from the consumer is currently of 10 to 30 € per month.

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CRAFTBEER PRODUCTION IN ITALY

290.000 HL = 1,7% on the overall production

Source “Assobirra”

The craft breweries are about 320.

In 2000 they were about 60. This will lead soon to a reduction of production units, in favour of an increse of sales quantity.

We shall then await an action from the craft breweries in the direction of covering with their specialties the room created by the lacks of mainstream brands.

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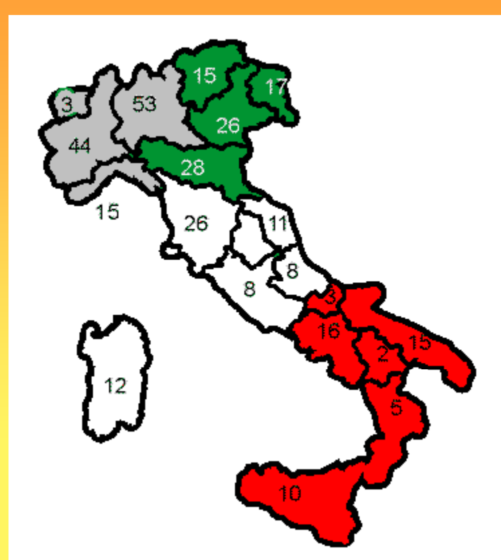
CRAFT BREWERIES

NORTH WEST TOTAL:
115 - 36,16%

CENTER TOTAL:
66 – 20,75%



NORTH EAST TOTAL:
86 – 27,04%

SOUTH TOTAL:
51 - 16,04%

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SUCCESSFUL BEER STYLES THAT RAISE INTEREST IN THE CONSUMER

LOVER: stable consumption

- Abbaye: Leffe, Grimbergen
- Blanche: Hoegaarden
- Stout: Guinness
- Strong lager, bottom fermentation: Ceres (DK), Amsterdam (NL)

CONNOISSEUR: consumption raising

- Trappisten
- Italian craftbeers
- UK craftbeers
- US craftbeers

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REQUIRED SHELF-LIFE

USUALLY 12 MONTHS ON-TRADE
BETTER 18 MONTHS OFF-TRADE

LOWER SHELF-LIFE IS ACCEPTED FOR

- SEASONAL BEERS: 6 - 8 MONTHS
- LIMITED EDITION: 6 – 8 MONTHS

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LABEL REQUIREMENTS

Kind of product: beer

Symbol e + bottle's content

Best before

Symbols

Alcohol degree

List of allergens, or complete list of ingredients with decrease order + spices and aromas if more than 2%

Name + city and Country of the producer

Name + city and Country of the respondible for trade into EU

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CONTRIBUTION MARGINS ON-TRADE

(43,2% Market share) for the distributor towards the Point of Sale

BOTTLES: from 27% to 33% craft

from 15% to 18% mainstream brands

KEG: 40% special blond included investments for technical equipments

35% specialties included investments for technical equipments

25-30% mainstream, without investments for technical equipments

STRUCTURE

IMPORTER	NATIONAL PRODUCER
↓	↓
LOCAL DISTRIBUTOR	LOCAL DISTRIBUTOR
↓	↓
POINT OF SALE	POINT OF SALE

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ITALIAN TRENDS

STABLE

- BELGIAN CRAFT BEERS: triple, abbaye, main stream brands: Ambev
- WEIZEN from Germany

RISING:

- FRUITY CRAFTBEERS Geuze based
- Italian and USA IPA
- LIMITED EDITION
- BLANCHE Belgian craft beers
- SEASONALS

REDUCTION:

- STOUT INDUSTRIAL
- STRONG LAGER bottom fermentation
- PREMIUM LAGER main brands

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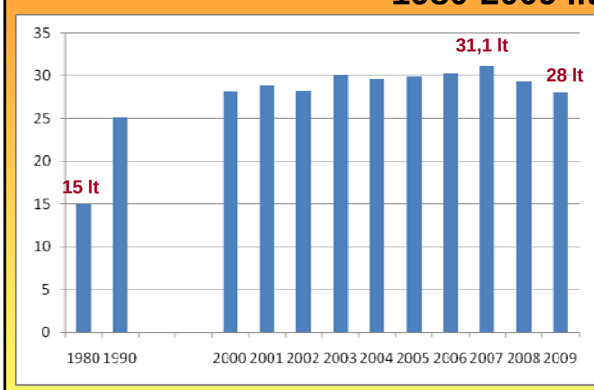
PRO CAPITA BEER CONSUMPTION IN ITALY 1980-2009 litres



Since 2007 the consumption has been reduced by:

- Rise of excise duty
- Prohibition of smoking in public venues
- Drink driving restrictions
- Financial crisis with an overall reduction in comsumptions.

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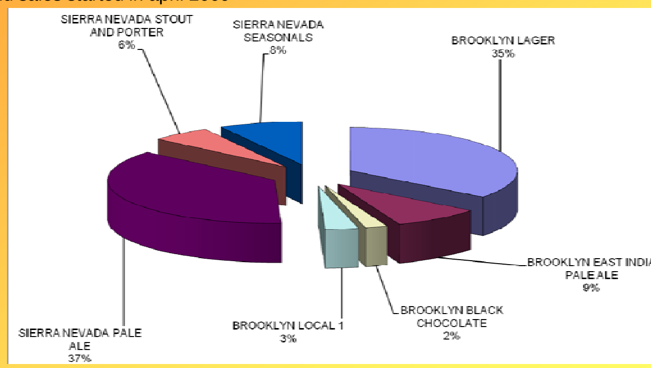
INTERBRAU: OUR USA BRAND

BROOKLYN: lauched in February 2009 (Rimini exibition) and sales started in april 2009

SIERRA NEVADA: 2009



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These 2 brands are distributed exclusively on the ON-TRADE quality channel such as:

•Pubs: portfolio Sierra Nevada, Brooklyn Eipa, Brooklyn Chocolate Stout

•Lounge bar: Brooklyn Lager

•Restaurants: Local 1

Starting from 2011 we will start to introduce some labels in the high level OFF-TRADE, because some buyers are realizing that they have to introduce some ON-TRADE fashion brands, but they have limits in the sense that they fear the low rotation of the products, new brand introduction fees, since they know that no one has the financial capacity to support those costs.

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GRUPPO GABRIELLI oasi

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MARK-UP OFF-TRADE (56,8% Market share)

COMPOSITION OF PRICE BOTTLE 0,355 USA

$ 2,40

$ 2,00

$ 1,48

$ 1,23

$ 1,10

RECOMMENDED PRICE
$ 2,40

ACTIONS: TWICE PER YEAR

15% MARK UP

20 % required by the producer

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We are experiencing the best results in pubs attended by beer-connoisseur, because the IPA taste is widely appreciated for its novelty, aroma and complexity.

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The response is good also in the lounge bars of the big cities such as MILAN and FLORENCE. In these venues the long neck bottle is really appreciated because it is thin, easy to handle and drink without glass.

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The market is in a continuous evolution and the consumer is curious and keen to try the novelties, but you never have to betray his expectations of indisputable quality.

Only in this way we will be rewarded with great sales.

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ADVICE ON HOW TO PROMOTE U.S. CRAFTBEERS IN ITALY

- COMMUNICATION: make clear to the consumer that the American craftbeer is not the one he has been used to up until now, light, blonde and insignificant, but it is now what comes out of well reknowned European styles, revised and modernized.
- LOCAL EXHIBITIONS
- TASTINGS with invitation to opinion leaders, journalists, cooks.

Everything in coordination with a craft beer fanatical and prepared partner, because only with great passion, availability of time, effort and human resources, it will be possible to achieve great commercial results.

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