

Chinese Beer Industry: Capitalizing the Regional Markets

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The beer market in China is not national – it is an aggregation of local markets with each region having specific tastes, preferences and spending pattern. As a result of the localized nature of the beer market, small regional breweries dominate these fragmented markets. These regional local brands have a nationwide market share of less than 2%.

Foreign breweries have time and again tried to penetrate the Chinese beer market with differentiated strategies. The foreign breweries like SABMiller, Inbev and Anheuser-Busch with global presence and financial clout have entered the Chinese market through joint ventures/partnerships with domestic breweries. These global firms, mostly in partnerships with national breweries have opted for inorganic growth by acquiring the small regional players and as a result the fragmented market with the total number of breweries exceeding 800 has now reduced to around 500.

The Chinese beer market is still a fragmented market with the top four breweries in China controlling only 45% of the total market share. China Resources Snow Breweries is the top brewery in China, with an estimated nationwide market share of 15% in 2006, followed by Tsingtao at 13%, Yanjing at 10% and InBev at 7%.

Although China is the world's largest consumer of beer in terms of volume, it is still under-penetrated because its per capita consumption is still the lowest when compared to the US and European countries. This offers tremendous growth opportunities for the large breweries operating in China. But only those beer firms are likely to succeed which can strengthen their distribution network and sustain low profitability. In the long term, increased scale could be the driving force behind increased market profitability.

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