

FEVIA – 3 October 2013

De Montil in Affligem



DUVEL MOORTGAT

QUALITY BREWERS SINCE 1871

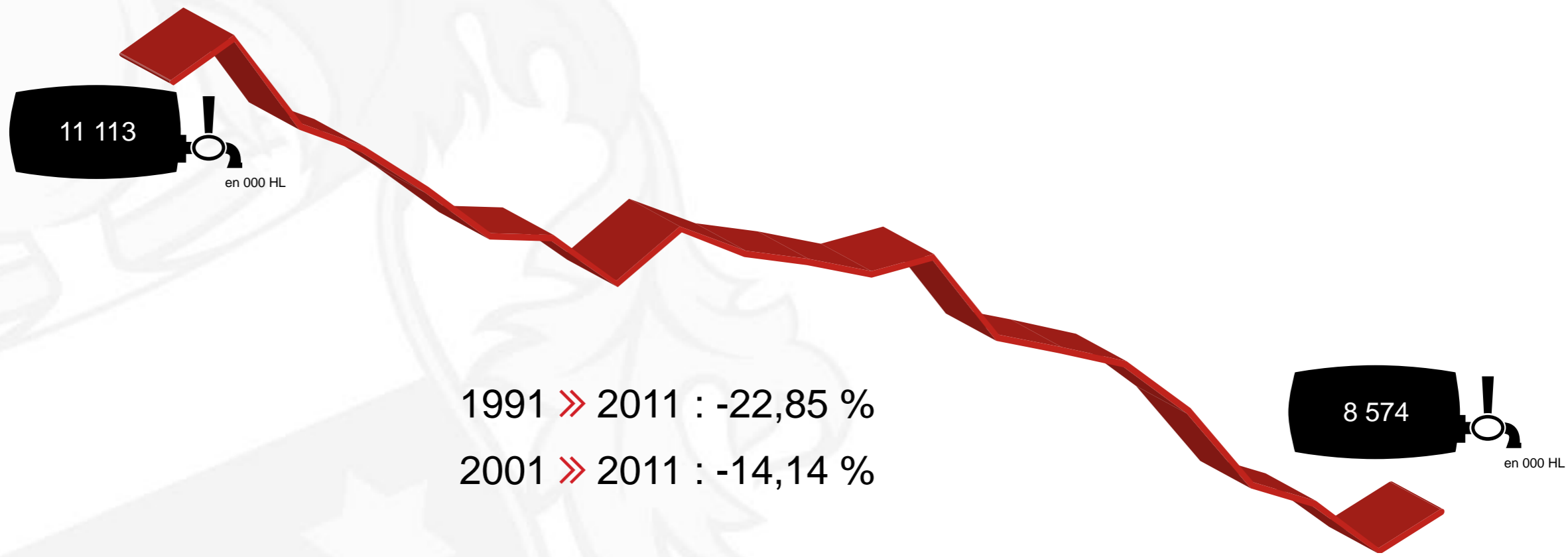
Xavier Le Cocq – Regional Export Manager

Brouwerij Duvel Moortgat - www.duvel.be

EVOLUTION OF BELGIAN BEER MARKET

1991

2011



1991 » 2011 : -22,85 %
2001 » 2011 : -14,14 %

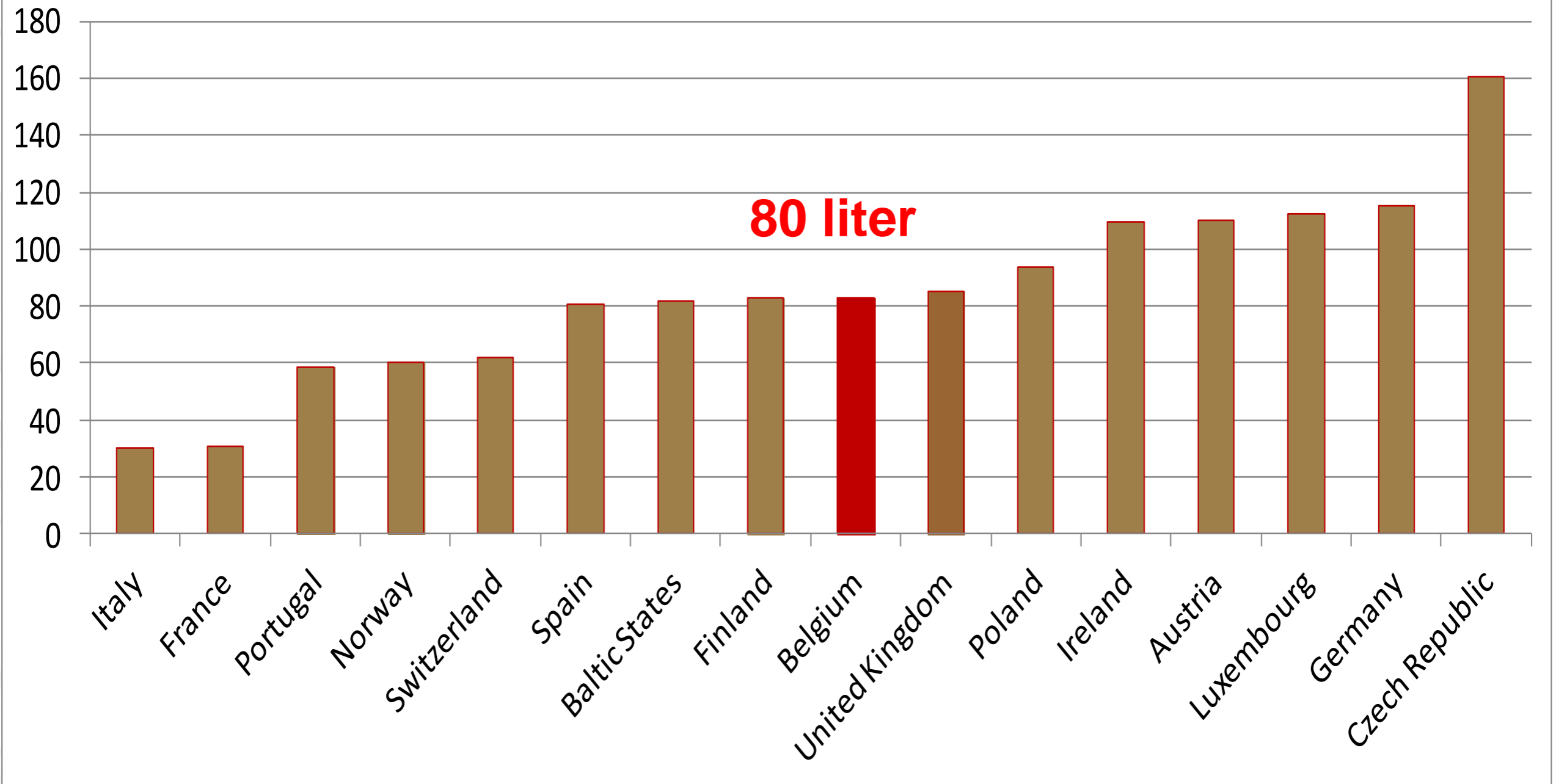


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BEER CONSUMPTION IN EUROPE

Beer consumption per capita (in liters)



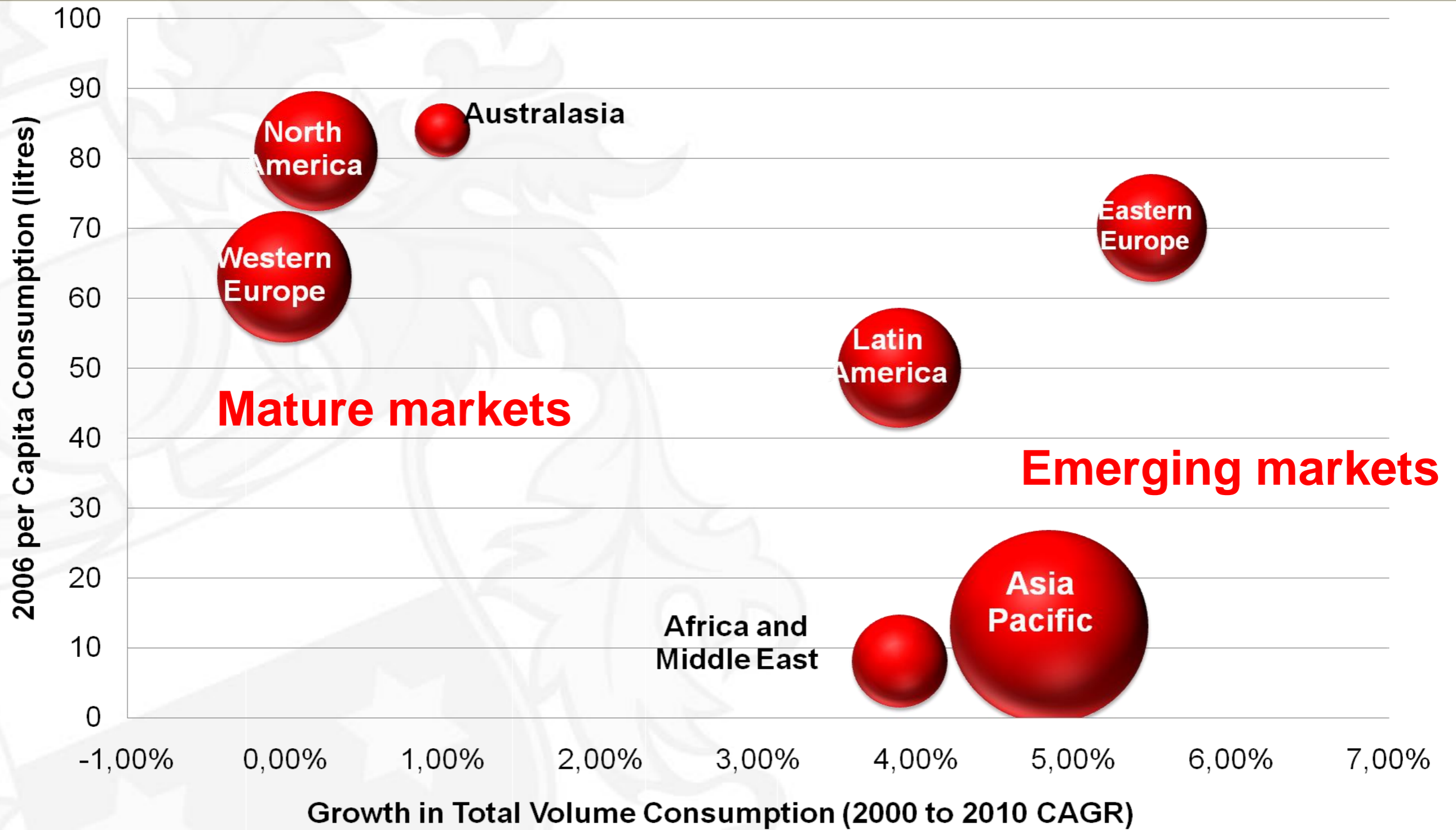
WORLD BEER CONSUMPTION

In 2011:

- **Worldwide consumption: 1,925 bn HL**
- **Average growth 2006-2011: 2.9%**
- **Average consumption per capita: 27 L**
- **Largest consumer: China with 487 m HL**

Source: Plato Logic 2009

WORLD BEER CONSUMPTION + GROWTH



Source: Goldman Sachs

DUVEL MOORTGAT HISTORY



- Founded in **1871** as a small local brewery
- Today, **fourth generation** Moortgat continues this brewing heritage with a professional, transparent and long term vision

DUVEL MOORTGAT STRATEGY

1999-2000: New Strategy

Mono production



6 breweries

Mono brand



Full portfolio

Mono country



International
organisation

DM ORGANISATION

6 breweries in 3 countries



PUURS
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1871



OUDENAARDE

2008



ANTWERPEN

2010



BERNARD CZECH REPUBLIC

2001



OMMEGANG USA

2003



ACHOUFFE

2006

DUVEL MOORTGAT MISSION STATEMENT

Driven by **quality**, Duvel Moortgat is a **niche** player that aims to occupy a **leading** position in the profitable segments of **specialty** beers and premium brands...

...both in **Belgium** and in its priority **export** markets.



QUALITY is KEY!



- Raw materials
- Best available technologies
- People
- Partners



DUVEL MOORTGAT

QUALITY BREWERS SINCE 1871

DUVEL MOORTGAT TODAY



- 3rd largest brewer in Belgium
- 100% family controlled
- Turnover: 2012: ± 180 mio EUR (x3.7 vs 2000)
- Net profit: 22 mio EUR
- HR: ± 800 employees
- Consumption: 4 Duvels / second
- Production: ± 800.000 HL / year

55.000 bottles / hour



PORTFOLIO APPROACH

Strong brands covering all beer segments appeal to different consumers & moments



Liefmans

Vedett

De Koninck

Chouffe

Duvel

Maredsous

Masterblenders

Liefmans



DUVEL MOORTGAT

QUALITY BREWERS SINCE 1871

Duvel Moortgat's international presence



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EXPORT MARKETS

1. Priority markets (NL, FR, USA, UK, CHINA)

- own commercial & distribution structure
- through DM subsidiaries & acquisitions

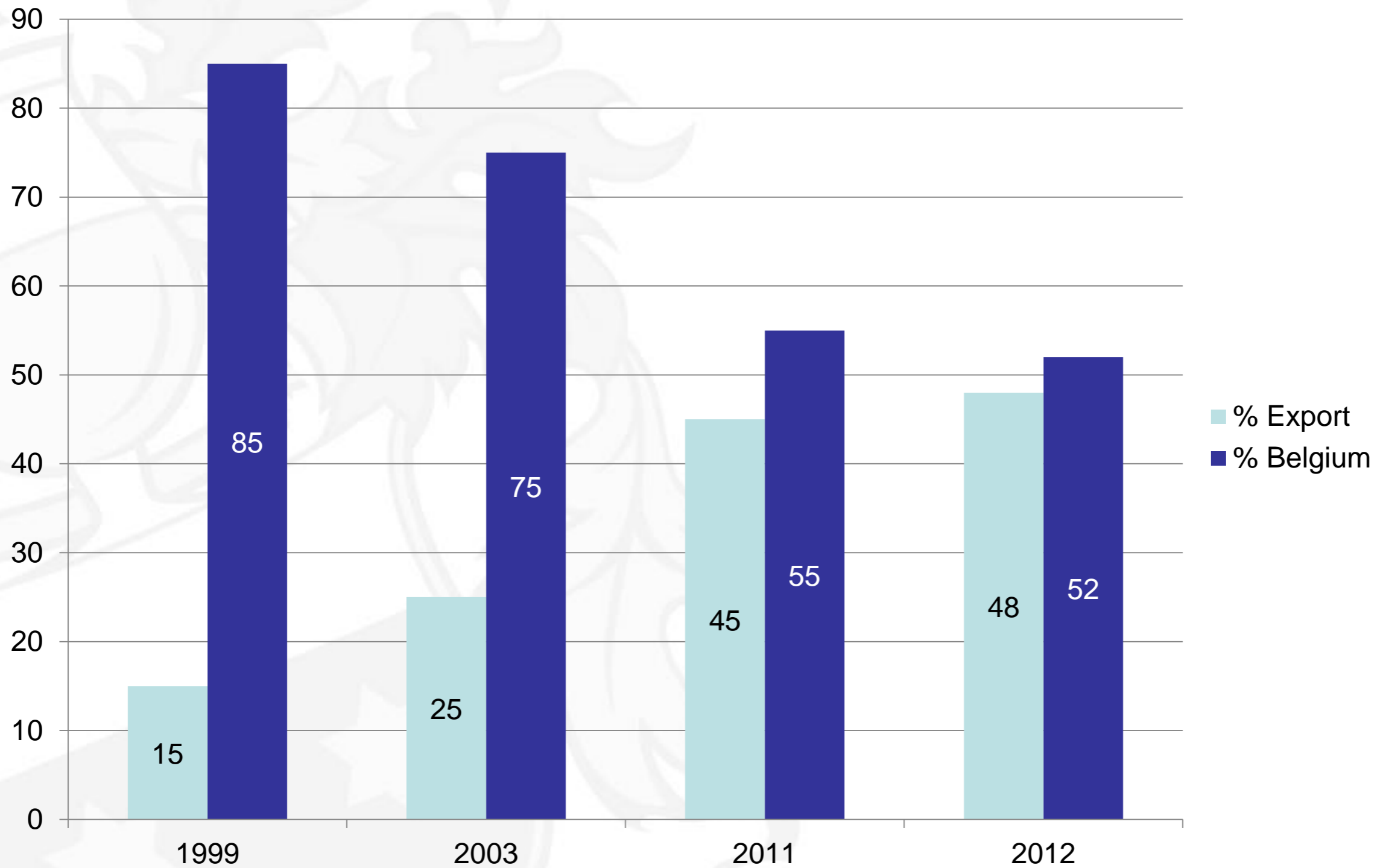
2. Emerging Export Markets (> 70 countries)

- select the right partner

- Beer knowledge + focus on quality
- Distribution + brand building: on trade > off trade
- Willingness to co-invest in long term

⇒ PASSION!

SALES SPLIT BELGIUM vs EXPORT



DM IN JAPAN

More than 20 years collaboration with Konishi:

- Leading sake brewer + micro Beer prize 2011
- 15th generation, since 1550
- Common aim to strive for top quality
- Perfectly in line with DM mission statement
- Very professional approach
- Daily contact, regular visits of Konishi to Belgium and vice versa



COLLABORATION WITH KONISHI

Very high quality standards:

- Packaging: perfect bottle – and label condition:
 - Hand- inspection of each single bottle
- Shelf life and product flow:
 - close follow-up on best before dates and FIFO
- Transportation:
 - different types of containers according to season



DUVEL MOORTGAT

QUALITY BREWERS SINCE 1871

COLLABORATION WITH KONISHI

Close cooperation and communication:

- Daily communication
 - Best practice in Belgium
 - Adaptation for Japan
- Locally produced materials and communication tools always up to DM standards



DUVEL MOORTGAT

QUALITY BREWERS SINCE 1871

Duvel = A World Brand



Thank you for your attention.

Q & A?

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