



Vlaanderen
is Internationaal Ondernemen



THE BEER MARKET

IN INDIA

FLANDERS INVESTMENT & TRADE ZOCHT HET VOOR U UIT

The Beer Market in India

Flanders Investment & Trade, Mumbai

February 2014

TABLE OF CONTENTS

EXECUTIVE SUMMARY	5
SCOPE OF OUR STUDY	7
METHODOLOGY	7
OVERVIEW OF THE BEER MARKET	8
BRANDS IN THE MARKET	10
DOMESTIC BRANDS	10
INTERNATIONAL BRANDS	14
RETAIL SALES.....	16
INSTITUTIONAL SALES.....	17
MICROBREWERY	18
CHALLENGES IN SETTING UP A MICROBREWERY	18
MARKET SHARE.....	20
BEER VS OTHER ALCOHOLIC BEVERAGES.....	22
WOMEN RISING TO THE OCCASION	23
PRICING BY BRANDS	24
COMPARISON BETWEEN RETAIL AND INSTITUTIONAL PRICING	26
CUSTOMS DUTY FOR INTERNATIONAL BRANDS.....	27
BELGIAN CUSTOMS ATTACHE IN DELHI.....	28
LABELLING REGULATION.....	30
CHALLENGES IN THE MARKET.....	32
BAN ON ADVERTISING.....	32
REGISTERING A BRAND WITH THE CANTEEN STORE DEPARTMENT IS DIFFICULT	32
IMPORT DUTIES ON INTER-STATE TRANSFERS.....	32
DISTRIBUTION IS A KEY ENTRY BARRIER.....	32
PRICE HIKES LIMITED TO ONCE A YEAR	32
MARKET TRENDS AND PROMOTIONS.....	34
INSTITUTES OFFERING ALCOHOL TECHNOLOGY COURSES.....	35
CASE STUDIES.....	36
BEER CAFÉ - GURGAON	36
PINT ROOM – PAN INDIA.....	36
ROCKMAN'S BEER ISLAND - GURGAON	37
MOB - HYDERABAD	37
BIERE CLUB - BANGALORE	38
DOOLALLY - PUNE.....	38
SHIVSU CANADA PURE FILLERS COLLABORATE WITH BELGIUM'S PRODEB BREWERY	39
CERENA IMPORTS.....	40
INDUSTRY CONTACTS	41
INDIAN IMPORTERS DISTRIBUTORS AND LOCAL BREWERIES	41

IMPORTERS CATERING TO DIPLOMATS.....	45
RETAILERS STOCKING ALCOHOL AND SPIRITS	47
MICROBREWERY AND BREW PUBS	49
RELATED EXHIBITIONS INDUSTRY ASSOCIATIONS AND RELATED BODIES	51
BIBLIOGRAPHY	52

India offers interesting opportunities to companies throughout the FMCG-sector, and the food and beverage market in particular shows a large potential for growth. India's food and beverage industry currently stands at US\$ 40.3 billion and is expected to touch US\$ 66.3 billion by 2018, amounting to a growth of 18 per cent.

If we look at the alcohol and liquor industry, we see that the market has progressed well in last 7 years, with major brands entering the market. In the coming years also we are set to see steady growth in this sector. For beer, the Indian market is expected to grow by 13.2 % by 2016. The growth rate for the beer industry is an indication of the huge scope of opportunities available for breweries and beer brands marketing and/or manufacturing in India. Most of the major distilleries and breweries have now created a base in India, either in the form of a manufacturing unit or through distributors and importers.

The alcohol and liquor industry has both domestic and international players. Co-existence of these players has made the market competitive and challenging. A cross section of different types of alcoholic beverages and liquor along with variety of brands provides an excellent range to Indian consumers. Though it's appropriate to say the majority of drinkers in India prefer to go with hard liquor, beer as a drink is quite popular, and steadily catching up with the market leaders.

Domestic players have an advantage over international brands when it comes to price. On the other hand international players offer better taste and quality products, though domestic players at present have raised their level in order to compete with new international competitors. International players are liable to pay relatively high customs duty for marketing their products to India, and international players also have to abide by state taxes, which differ from one state to the other. Logistics and warehousing are another issue for international brands being imported to India, and indeed one of the reasons why certain international brands have delayed their entry into the market.

Along with taste and quality, pricing is one of the most important factors that need to be worked out for all international brands entering India market. Though the market has opened up in last 7 years, price is still a sensitive issue when it comes to marketing products in India. International players like Carlsberg and Sab Miller who have previously marketed products through distributors, later chose to set-up their own breweries in India. It's best for new international players to test out the market through the distributor/importer model: if the initial market feedback is positive, setting up a manufacturing facility for the long term perspective might be appropriate. For some foreign beer brands, the distributor/importer model has worked out well and for years they have continued to sell their products through this model. This is not unusual, given a lack of raw materials, inferior quality of hops and issues regarding intellectual property rights complicate local production.

The pub and bar culture in India is picking up, and is becoming more popular in the 20-45 age group. Though one would find more pubs in metro cities like Mumbai, Pune, Bangalore, New Delhi, and Gurgaon the tier two cities are following closely. The tier two cities are being influenced by metropolitan areas as far as the pub culture is concerned and in few years' time will be at par with metro cities in India.

In a nutshell, the Indian market offers lucrative growth prospects for foreign alcohol and spirits brands. But one needs to keep in mind that the market entry barriers are rigid and it does take good amount of effort in order to assess and start a business in India. While making a market entry, one needs to pay attention to the high customs duty, state tax barriers, inadequate logistics and warehousing facilities which are among key challenges.

February 2014, Mumbai

SCOPE OF OUR STUDY

The scope of the report is to understand the domestic beer market including competition in the form of domestic and foreign brands/breweries already active in India, their product portfolio, current market shares, segmentation, positioning, advertising and promotional strategies, distribution channels, trade barriers etc.

METHODOLOGY

The study involves desk based research (company websites, press releases and reports) and collection of data through stores in Mumbai and conversations with importers/distributors of foreign alcohol and spirits brands in India. India being a large country with relatively low penetration and incomplete availability of organized data, it is important for companies to understand that there is an element of 'subjectivity' in this report. The key findings and recommendations need to be considered in this context before taking major decisions with respect to India.

India is the fourth largest beer consumer in the Asia - Pacific region by volume - but as individuals, Indians are laggardly drinkers of the amber fluid, ranking at the bottom of the barrel among the world's top 30 beer markets.

Together, the nation's 1.2 billion population consumed 20 million hectolitres of beer in 2012 - but that's just 1.6 litres per person compared with 37 litres in China, 31 litres in Thailand, and 30 litres in Vietnam, according to a new report (Beeronomics 2013) by UBS Global. The low per-capita consumption is due to factors such as affordability, poor availability and strict regulations.

Beer is currently targeted at the higher middle and middle income demographics in India. It is estimated that of the top 30 global beer markets, India has the lowest affordability of beer relative to average GDP (gross domestic product).

Based on market data, India is the only BRIC (Brazil, Russia, India and China) country where a beer is more expensive than a Big Mac. Furthermore, on a unit/alcohol content basis, beer is 7 to 8 % more expensive than spirits.

The cost of beer is much higher in India than all other emerging markets when compared to the average income of consumers. On average, it requires 54 minutes of work to buy 500ml of mainstream beer in India compared with the global average of 20 minutes, and 9 minutes in China, based on findings of Beeronomics 2013.

Availability is another issue: there is one licensed outlet per 18,000 Indians, compared with one per 300 Chinese.

Top Beer Markets by Consumption

India's per-capita consumption of beer is expected to grow to 2.6 litres by 2016.

	Per-capita consumption (in litres)		Volume in 2012 (in hectolitres)	% growth by 2016*
	2012	2016*		
China	37	44	502.5	5%
US	78	75	244.1	0.2%
Brazil	68	74	134.3	2.7%
Russia	67	71	95	1.1%
Germany	110	104	89.7	-1.7%
Mexico	59	63	67.3	2.8%
Japan	45	44	57.9	-1.4%
UK	70	65	44.5	-1.5%
Poland	100	104	37.8	0.7%
Spain	77	72	35.9	-1.3%
India	2	2.6	20	13.2%

Source: Beeronomics 2013



The Beeronomics report, however, forecast that consumption will rise to 2.6 litres, a 13 percent growth in volume, by 2016. The states of Tamil Nadu, Andhra Pradesh, Karnataka and Maharashtra will drive 55 % of this industry volume. Growth will be driven by Indians below 30 years of age, overall economic growth and lower taxes. In April 2011, Karnataka raised the tax on spirits while leaving the tax on beer untouched - the first time there were different tax rates on different alcoholic beverages.

The growth estimate of 13.2 % is lower than the domestic industry's growth forecast of 15 %. It's very difficult to predict the market growth for beer in India as there is always uncertainty on the taxation front. Growth in the beer market is very dependent on government policies in different states. Since price elasticity in the market is high, every time the governments increase the tax on beer, sales are instantly affected. Liquor is taxed by state governments; hence the tax, mainly excise duty, varies from state to state.

Since alcohol is one segment from which all state governments expect a substantial chunk of their tax revenue, the tax on it is hiked unfailingly in the annual budget, and new duty structures are introduced during the year.

Along with restrictions on pricing, governments also control the distribution of alcoholic drinks in the market. Excise duty per litre of beer is the highest globally, and beer is taxed higher than spirits. Tax rates differ by state, ranging from a low 15 % to 70 %. In addition, a ban on advertising alcohol makes premiumization and innovation a challenge.

Beer volume sales are forecast to grow at a CAGR (Compound annual growth rate) of 10 % in the period 2012-2017. Forecast sales growth is expected to be more or less in tune with review period sales growth, as companies continue to build distribution and keep introducing variants like flavoured beer or mild beer. Imported beer is expected to show a steady increase, as is craft beer, though both will remain with small share of overall beer volume.

BRANDS IN THE MARKET

The Indian Beer market is largely dominated by Kingfisher manufactured by United Breweries. Others like Haywards, Kock Out, Budweiser, Carlsberg, Tuborg are also pretty popular amongst beer drinkers. Some of the domestic and international brands along with their product portfolios have been listed below:

DOMESTIC BRANDS

KINGFISHER – UNITED BREWERIES

Brand Kingfisher is one of the leading players in Indian beer market, locally manufactured, Kingfisher holds over 55 per cent of the beer market in India. Following are the types of beer sold by united breweries in the brand name of Kingfisher.

Kingfisher Premium Lager

Kingfisher Premium Indian Lager - with alcoholic strength less than 5 per cent v/v. Lagered for a minimum of 3 weeks.



				
TYPE	Bottle	Bottle	Can	Can
PACK SIZE	650 ML	330 ML	500 ML	330 ML
PACKING	12 X 650 ML	24 X 330 ML	24 X 500 ML	24 X 330 ML
LOADABILITY 1 X 20FT FCL	1344	1071	1546	2259

Kingfisher Strong

Kingfisher strong premium beer was launched in 1999 in order to cater to the growing strong beer segment in the country.



Kingfisher Strong Fresh

Kingfisher strong fresh was one of the first ever strong draught beer available in the Indian market.



Kingfisher Draught

Only available in 500 ml cans, Kingfisher draught was targeted towards the age group of 20-30.



Kingfisher Ultra

Kingfisher ultra was launched in 2009, positioned as a mild beer in the market.



Kingfisher Blue

With under 6 per cent alcohol Kingfisher blue is available in 4 stock keeping units (SKUs)- 650ml and 330ml bottles and 500ml and 330 ml cans.



Kingfisher Red

Kingfisher red, a premium gravity beer, has a distinctive oaky woody flavor.



London Pilsner

London Pilsner premium strong is an economy beer. The brand was launched in 2008 and became extremely popular within Maharashtra.



Kalyani Black Label

Kalyani Black label is another economy strong beer brand promoted by United breweries.



Zingaro

Zingaro Super Strong was launched in the year 2000, when the Indian Beer industry was experiencing a major salience shift from Lager to Strong.



CARLSBERG INDIA



Carlsberg entered India in May 2006 by incorporating a company named 'South Asia Breweries Pvt. Ltd'. The name changed to 'Carlsberg India Private Limited' on 23rd February 2009 to reflect the company as a part of the Carlsberg Group.

Indian consumers have been experiencing Carlsberg since the 1900s, much before it commenced operations in India. In 1912, Mc Dowel and Co. Ltd., Madras, ordered the first delivery of 10 cases of quarters and 10 cases of pints each of Carlsberg Munich and Pilsner Beer.

Over the years there were many companies and agents that have brought Carlsberg to India.

Carlsberg's commercial operations started in June 2007 with the commencement of production at an acquired brewery at Paonta Sahib, in Himachal Pradesh. The introduction of Okocim Palone in the strong beer segment in some markets of North India was the first leg of its entry to India. The very first sale took place on June 2, 2007 with Okocim Palone in Himachal Pradesh.

Carlsberg expanded its operations by establishing breweries in Alwar, Rajasthan in March 2008 and in Aurangabad, Maharashtra in August 2008. In its mission to expand its reach to Indian consumers, two more breweries became operational at Hoogly (near Kolkata) West Bengal in June 2009 and Sangareddy, Andhra Pradesh in December 2010. In 2013 Carlsberg India

inaugurated its 6th Brewery in Dharuhera, Haryana. In this short span, 6 breweries have been set-up, which re-emphasize the Carlsberg Group's strategic focus on India. The growth started from 5 markets in 2007 to 24 markets in 2008 to 32 markets (including Union Territories) to date.

Carlsberg India has an impressive beer portfolio which includes a good mix of mild and strong beer - Carlsberg, Carlsberg Elephant, Tuborg, Tuborg Strong and Palone 8.

Carlsberg Green

Carlsberg Green is a flagship brand and this super premium beer in the portfolio was launched on 15th September 2007. It is available in 330ml Can, 500ml Can, 330ml bottle and 650 ml bottle.



Carlsberg Elephant

Carlsberg Elephant was launched in the super premium strong beer segment in the Indian market in January 2011. Carlsberg Elephant has fared well and consumers have appreciated this brand especially in India where strong beer comprises 80 per cent of the beer market.



Tuborg Green



Tuborg Green, was launched in India in March 2009. Tuborg Green is a bottom fermented lager beer. It is available in 330ml bottle, 500 ml can and 650 ml bottle.

Tuborg Strong

The Tuborg growth has been driven by Tuborg Strong which has seen unprecedented success in all markets. The introduction of Tuborg Strong in May 2010, positioned Carlsberg India in the all new premium strong beer category. In the first 6 months of its launch, the brand sold more than a million cases - a milestone in itself. It is available in 330ml bottle, 500ml can and 650ml bottle.



Tuborg Booster Strong

Tuborg Booster Strong is an extra strong beer.



Palone 8



Okocim Palone was the first brand launched by Carlsberg India. Carlsberg started commercial operations in India in June 2007 with the commencement of Okocim Palone's production in the 'strong beer' segment. It was re-launched in January 2011.

SAB MILLER INDIA

One of India's leading brewers with 10 high quality breweries strategically located in 9 states. Sab Miller India is spread over a large geography. They have chosen a decentralized organization model supported by a lean central function that will introduce and implement proven best practices in the beer industry. Sab Miller India has 10 world-class breweries strategically located across India, which are well positioned to easily access and efficiently service the beer markets.

Peroni Nastro Azzuro

Peroni Nastro Azzuro is the international premium beer from Italy.





Indus Pride

Indus Pride, the first Indian specialty beer. Available in a bespoke 330ml bottle, Indus Pride comes in a range of variants like Citrusy Coriander, Citrusy Cardamom, Spicy Fennel and Fiery Cinnamon.

Miller High Life

Miller High Life is an American lager with 4.7 per cent v/v. The brand was launched in India in 2011 and is currently available in all the major cities in pack sizes of 330ml and 650ml bottles.



Foster's

Foster's Lager is an Australian beer

Haywards 5000

Haywards 5000 is a strong beer that contains 7 per cent alcohol. Haywards also produces Haywards 2000, a mild beer with 5.5 per cent alcohol, and the rarer super strong Haywards 10000. Haywards Black – locally made stout beer, is a strong dark colored beer, with 8 per cent alcohol.



Knock Out

Launched in 1984, Knock Out is available only in Karnataka, Maharashtra, and Andhra Pradesh. Sold as a strong beer in the market.

Royal Challenge

Royal Challenge Premium is a mild beer containing 5 per cent alcohol. It's most popular in the states of Andhra Pradesh, Uttar Pradesh, and Orissa.



Royal Challenge Strong

Royal Challenge Strong Beer is the newest addition to the Sab Miller Portfolio.



Some of the top selling international beer brands in India are:

STELLA ARTOIS	Available on tap, 330 ml bottle, 330 ml can
HOEGAARDEN	Available on tap, 330 ml bottle
LEFFE BLOND	Available in 330 ml bottle
DUVEL	Available in 330 ml bottle
CHIMAY	Available in 330 ml bottle
ASAHI	Available in 330 ml bottle
CORONA EXTRA	Available in 330 ml bottle, 650 ml bottle
SOL	Available in 330 ml bottle
LONDON PRIDE	Available in 330 ml bottle, 650 ml bottle
SAN MIGUEL PALE PILSEN	Available in 330 ml bottle
ERDINGER WEISSBIER BEER	Available in 330 ml bottle
SCHNEIDER WEISSE	Available in 330 ml bottle, 650 ml bottle
SCHNEIDER WEISSE	Available in 330 ml bottle
MURPHY'S BLACK STOUT	Available in 440 ml can
GUINNESS DRAUGHT	Available in 440 ml can
AMSTEL	Available in 330 ml bottle
BECKS	Available in 330 ml bottle
ESTRELLA	Available in 330 ml bottle

Young urban consumers are open to experimenting with international brands; for them beer is a trendy drink to be seen with when they go pubbing with friends. Super premium international brands, customized brews, beer on tap and beer menus and festivals are all helping in expanding the market.

Even though strong beers still constitute more than 80 per cent of the beer market in India, it's in the premium and super premium segments where the action is heating up, with four big players — United Breweries (UB), Sab Miller, Carlsberg and Anheuser-Busch InBev — in the fray. Their target consumer, the aspiring middle - class urban Indian. The high-end imported beer segment grew at 30-35 per cent on a lower base. Of India's total beer consumption of about 270 million cases, premium mild beer sales are pegged at 46 million cases. Of that, super premium mild beer would be about 5 million cases.

Anheuser-Busch In-Bev, which has brought Budweiser, Stella Artois, Leffe Blonde, Hoegaarden and Corona to India, is focused only on the premium and super premium segments and has no offering in the core strong beer category. Among these labels, only Budweiser — positioned as a premium lager beer — is made in India.

Sab Miller is also upbeat about the premium beer segment, which is the fastest growing segment. Sab Miller India is present in this segment with brands such as Miller High Life, Indus Pride and Peroni Nastro Azzurro. While Miller High Life is a global beer brand and positioned as a premium beer targeting professionals in metro cities, Indus Pride, which was launched last year, is a category innovation by Sab Miller India and is India's first speciality beer brewed with authentic Indian spices.

Beer makers are doing their bit to push products in the non-summer months by associating with sporting and musical events. Brew pubs are also helping spread the beer culture with more awareness on types and styles of beer, temperature, matching food and beer accessories. Over the past few years the famous German beer carnival, Oktoberfest, too has become popular in Bangalore, Mumbai, Delhi and Hyderabad.

The liquor market in India is getting a smarter make up with leading liquor brands making foray into retail industry and organized retailers showing interest in including liquor as one of the items in their merchandise, observing its rising demand in the market.

When Scotch whisky was introduced into India in the nineteenth century, it was largely introduced only for namesake, as India traditionally didn't have a domestic drinking culture. Over the years it has become fashionable. Since then India now has around 24 brands, and nine manufacturers. One of them is Allied Blenders and Distillers Ltd., (ABD) which has made its mark as one of the successful manufacturers in the country. It's the third largest spirits company in India.

The changing times have also changed the options for alcoholic beverages. With people becoming more health conscious the alcoholic beverage companies realised that they would have to cater to stricter demands from the people. There was a beer belly fear. And so the companies introduced diet beer. United Spirits Limited (USL) has found a way of inducing health conscious Indians to drink by introducing 'diet' versions of beer, whisky and vodka. Romanov vodka became the latest entrant to come with a 'diet' tag, after Kingfisher diet (beer) and Mc Dowell No 1 diet (whisky).

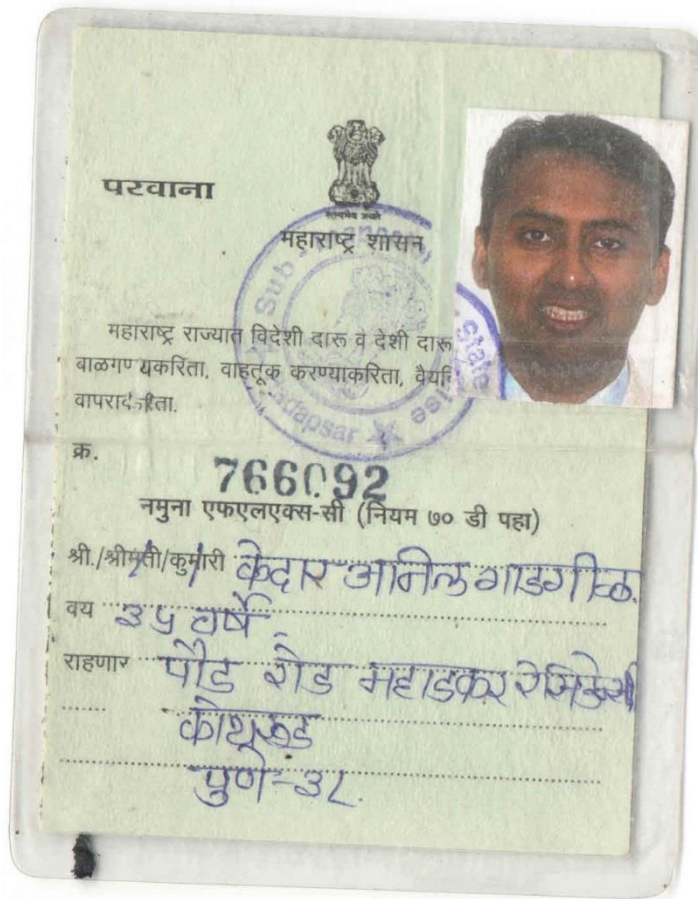
Alcoholic drinks are widely blamed in India for leading to weight gain. That the diet version of Mc Dowell No1 whisky has done well is an understatement. Within a year of its launch, it accounted for 10 per cent of Mc Dowell No1 sales. Similarly diet Kingfisher beer has also been a runaway success.

The rising popularity of cognac can also be attributed to the rising health consciousness in India. Catering to the growing health consciousness of the people has therefore become a major marketing mantra for the alcoholic beverage manufacturers to sustain the growth momentum of the industry. There are several low calorie beverages available like red wine, champagne, diet lime vodka, gin and tonic, diet Cuba libre, etc.

Institutional sales form a big chunk of the volume sale of alcohol in the country. Leading hotel chains, fine dining restaurants, local pubs, clubs and lounge bars are some of the prominent channels for bulk sale of alcoholic beverages. For manufacturers of alcoholic beverages, these types of eating joints serve as an excellent platform to introduce new variety of products; helps promote brands, offer lucrative discounts as a part of the marketing strategy in order to attract more customers. These places attract a combination of customers, customers who are willing to try out and experiment new liquor or alcoholic beverages, as well as the conservative drinkers who like to stick to their usual.

The minimum requirement for procuring and serving alcohol requires these types of chains to obtain a liquor license, which basically grants them the permission to procure and serve alcohol to their customers in bulk quantities. Similarly a liquor license can also be issued to an individual customer who consumes or purchases alcoholic beverages, both the above are as per laws of the land. The procedure for obtaining the license varies from case to case and the fees for the license differ between an individual and a hospitality chain. Obtaining a liquor license proves to be a deterring factor for a lot of start-ups in the food and beverage sector looking to serve alcohol. The process for getting a license varies between different states of India, what might be the process for Maharashtra, might not be the same for Karnataka. Expert advice is recommended for international brands in case they are looking to set-up pubs or clubs in India.

Sample of individual liquor license



Till recently, Indians were exposed to only one kind of beer the commercial lager. It is a fairly competent product till such time it leaves the brewery and hits the supply chain. When the bottled beer finally gets to the consumer, it could be as old as five months and may have faced fluctuating temperatures, poor storage and transportation. It is only in India that bottled beer is chilled just before consumption.

It was a desire to skip this tenuous supply chain that gave rise to the notion of 'independent' breweries in India. Known as microbreweries, they began by producing limited quantities of beer each day. In a commercial format, they are better known as brewpubs. These are essentially lounge bars where one can consume fresh off the tap beer that has been brewed in house. These microbreweries produce between 1,320 and 13,208 gallons of beer per day. None of it is bottled and there are no preservatives added in the process.

There is a possibility of creating about 2,000 different varieties of beer. Indians are now seeking a wider choice and better quality that only craft brewers can offer. And since experience leads to education, Indians, especially in the metros, now have a better understanding of beer than ever before.

Beer drinking is still restricted to the 'bottled' concept and there is very little awareness about the beverage. That's why many brewpubs offer a tour of the brewery to help consumers understand the various stages of brewing. Not only does it give a fresh perspective to beer but also builds a brewer client relationship.

When it comes to ingredients, most craft brewers prefer imports. Micro brewing is a fresh concept and most barley suppliers only have the kind of grain that's used by industrial breweries. Once the demand for a better bouquet of barley increases, it will be profitable for the suppliers to cater to the growing need. In the next two years barley used for craft brewing will be sourced domestically. Another key import is the hops. These are a special kind of flower endemic to temperate zone countries. Hops are the all important ingredient that give a beer its distinctive bitterness and also act as a stabilizing agent.

The brew bubble is seemingly growing but owners of these businesses are still struggling with operational and external challenges. These range from stringent state liquor laws, licensing issues, restriction of funds and lack of skilled labour for the highly technical job of brewing. Presently there are just three schools that provide a degree in brewing technology; it takes two years to train a student of microbiology to get a granular understanding of brewing. In such an environment, it is difficult for small brewing companies to predict growth.

Despite this, a bevy of microbreweries have mushroomed in areas where residents have large disposable incomes (Gurgaon, Pune, Bangalore and even Chandigarh and Panchkula). Notably, these areas are also close to metros, like Delhi and Mumbai, where liquor laws are too strict for a microbrewery to flourish. These cities are demographically blessed with young professionals who can afford to spend a bigger buck for a product that goes the extra mile.

CHALLENGES IN SETTING UP A MICROBREWERY

After three years of running from one government office to another, Boston boy Gregory Kroitzsh and brew master from Alaska, Benjamin Johnson have finally opened Mumbai's first microbrewery.

While the past two years saw microbreweries propping up by the dozen in Pune, Bangalore, Gurgaon and even in smaller cities like Haryana, Mumbai's thirst for a good brew kept building, in some cases even leading people to Pune for a beer weekend. The microbrewery was set up more than a year ago, the team was in place, the staff was hired, the brew master as Kroitzsh said "sat on his butt for two years", the rentals were being paid but the licenses didn't arrive for

about two and a half years owing to the strict licensing policies and the tough-to-navigate bureaucracy.



If Twitter, Instagram, Foursquare and Facebook are any indication, the news of The Barking Deer ready to serve the city's first freshly brewed beers has the tippers in Mumbai very excited. On the day of the launch, the tweeting and status updates went on through the night and the ones not invited for the event were commenting and retweeting with as much enthusiasm. Meanwhile, the pitchers of the Bombay Blonde Ale, The Barking Deer India Pale Ale and Flying Pig Belgian Wit were disappearing moments after being filled from the taps. The freshest, lightest and smoothest brews are now just around the corner. The

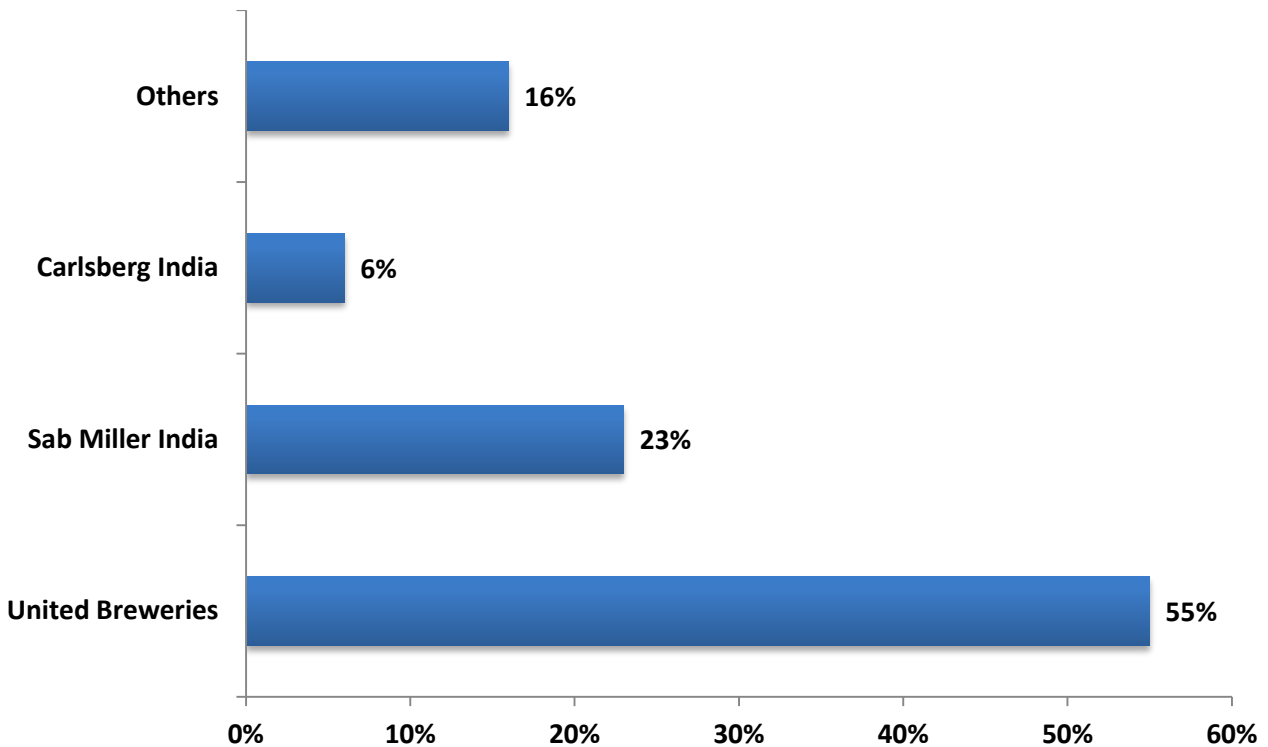
Barking Deer serves fresh brews, priced between Euro 2.96-4.14, starting November 7. Mumbaikars will no longer have to drive down to Pune to get their hands on some of the freshest, lightest brews

MARKET SHARE

United Breweries Ltd, the maker of Kingfisher beer, and Sab Miller India Ltd, which owns the Haywards and Foster's brands, are the top firms in the Indian beer market. These companies currently enjoy a market share of 55 % and 23 % respectively. The third player, Carlsberg India Pvt Ltd, is at 6 per cent, sharply increasing its share from 2011, but the gap still underlining the dominance of the top two players.

Tuborg, owned by the Danish brewing giant Carlsberg AS, has become the first international brand to break into the league of top five largest selling beers in India. Tuborg ended last fiscal year with 4.5 % share of domestic consumption, estimated at 275 million cases (of 7.8 litre each), giving it the fourth slot.

MARKET SHARE IN INDIA



The last big beer maker absent from India, world's largest beer company, Belgium-based AB InBev, has entered into a joint venture with the R K Jaipuria group to market its flagship brands Stella Artois and Beck's. With this, India has become home to the top five global brewers – Sab miller, Anheuser-Busch, Carlsberg, Heineken and InBev.

The Belgian company has picked up 49 % stake in the JV with RJ Corp giving InBev access to RKJ Group's strong distribution network and giving RKJ a portfolio of brands and operational expertise. The JV has plans to heavily invest in next 4-5 years which includes buying out breweries in the North and West.

RJ Corp has an established nationwide distribution and manufacturing presence and this will provide a suitable launch platform for InBev to foray into the Indian market with their products. InBev's expertise in the beer segment will prove to be a win-win situation for both companies.

United Breweries Ltd (UBL), India's largest brewer, expects sales of Heineken NV's namesake brand to climb more than 50 % in the country this fiscal year as it ramps up distribution of the pricier foreign beer. Heineken is the fastest growing line in the company's portfolio. The Amsterdam-based company owns about 37 % of United Breweries, which began distributing the European brand in 2011.

The brewer, based in Bangalore, is seeking to boost sales from the international label as demand for premium beers surges and global rivals from Sab Miller Plc to Carlsberg AS market new products to increasingly affluent young Indians.

As much as 80 % of the beer sold in India's beer industry is strong, with alcohol content of 6-8 %, United Breweries gets most of its revenue from its flagship Kingfisher brand, under which it sells lines including Strong, Draught and milder variants such as Ultra.

Alcoholic beverages have become a lifestyle with the young and the not-so-young. With increasing expendable incomes everyone is in high spirits and the market for alcoholic beverages is taking long strides ahead. The old adage of wine, women and song has now taken a new twist: women love wine and song. No wonder while the Indian Made Foreign Liquor (IMFL) is coming out with new diet drinks the international manufacturers, in spite of the government's stringent policies, are looking at the Indian consumer as a prospective client.

In India, the alcoholic beverages sector grew at a compound annual growth rate (CAGR) of over 12 per cent during 2004-09 and was worth \$21.7 billion in 2009. It might cross \$39 billion by 2014, predicts a recent Datamonitor report.

Nearly 30 to 35 % of adult men and five per cent of women are regular consumers of alcohol in India. The earliest age at which alcohol is consumed has also changed significantly — from 28 years in 1980 to 18 years in 2010.

Due to changing cultures, consumers are gradually opting to visit pubs and lounges more frequently. With a growth in young population in India, the youth is more inclined to drink lighter spirits which is spurring growth in white spirits, such as vodka, rum, gin and tequila. Players in the industry are launching regular and premium brands to tap this potential and growing demand. It has been found that previously the ladies had mocktails. The concept of mocktails is now slowly taking a backseat as the ladies prefer to have vodka and Bacardi based cocktails.

However, the partygoers in Pune, and in many other Indian cities, seem have developed a liking for beer. During 2010-11 the consumption of beer in Pune alone touched 30.87 million litres, a whopping 23.75 % over the last fiscal. The sale of Indian made foreign liquor (IMFL) like whiskeys and rums witnessed a growth of 14.7 %. Country liquor saw a growth of 13.27 %. On the other hand, the sale of wine rose by only 10 %.

The white spirits in India is nominal in terms of share, but in terms of popularity, it is growing rapidly as compared to the other spirits, and this provides huge potential for players to launch newer brands and flavors to exploit this potential. Furthermore, due to the changing profiles of consumers and growing culture of visiting pubs, the market is set to expand rapidly. The market is now being flooded with premium foreign brands.

This could be attributed to the fact that import duties have considerably decreased from 210 % in 2001 to 150 % in 2013. Distribution regulations have also eased relatively, reasons behind adequate availability of imported spirits and alcohol.

An analysis of the drivers of growth in the economy explain the factors for growth of the industry that include rising levels of income, dramatic change in the lifestyles of the people and higher acceptance of alcoholic beverages, huge market potential, entry of international brands, and growth in organized retail, etc.

Drinking is no longer a taboo, particularly with the younger generation. It has become a part of socializing. And even women have taken to imbibing spirits spiritedly. In fact, if you are a man and plan to go for a drink but lack a drinking companion, you might as well ask a female friend. According to the Datamonitor report, the demand for alcoholic beverages in India is growing faster among women than in men. Women have begun to experiment with a lot of alcoholic brands buoyed by their increasing financial and social independence.

Gone are the times when women sipped fruit juices while the men swigged their whisky on the rocks. They are no longer passive onlookers. They too consume alcoholic beverages but they mostly prefer vodka, breezers and vodka and Bacardi-based cocktails.

Besides cocktails and white spirits the drinks most preferred by the fair sex seems to be wine. The Datamonitor study notes that wine occasions - the number of times it is consumed - for women grew 100 per cent during 2004-09, with beer and spirits following at 66 and by 32 per cent, respectively. The corresponding statistics for men are 100 per cent for wine, 47 per cent for beer and 29 per cent for spirits. Incidentally, the report takes into account consumption at retail outlets alone, so the actual figures could be much higher. Also, manufacturers have resorted to innovative packaging and marketing to drive alcoholic beverage sales. Shrewd marketing by liquor brands to position alcohol as a lifestyle product and global exposure have helped to facilitate the acceptance of alcoholic beverages, particularly among the young population.

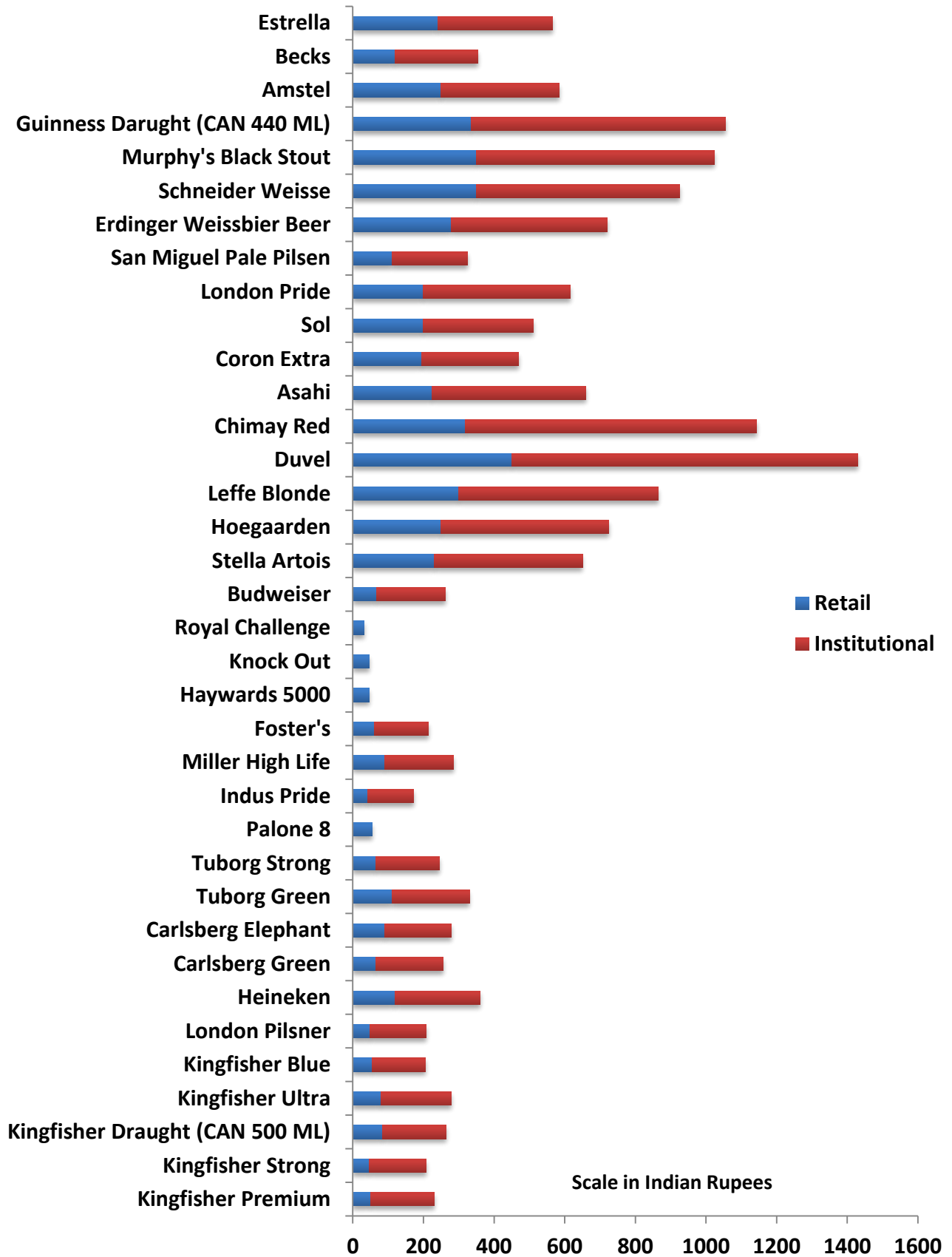
Vodka and drinks with lower alcohol concentration such as Bacardi breezers are also becoming popular. Yet when one looks at it from the general perspective, women constitute only three per cent of the total market, which compares even poorly to the global trend where women comprise a third of the total consumer base. Even in China, women account for 31 per cent of the total alcohol consuming population. Surprisingly, or perhaps because of the volume game, drink manufacturers have begun to cater to this niche market. United Spirits Ltd. introduced Pinky Vodka a few years ago and claims it has become an instant hit in metro markets.

1 Euro: 84.36 INR (As of 05 Feb 2014). These are approximate figures.

BRAND	QUANTITY (PINT -330ML)			
	RETAIL (SHOPS/ OFF THE SHELF SALE)		INSTITUTIONAL PRICING (PUBS AND HOTELS)	
	INR	EURO	INR	EURO
KINGFISHER PREMIUM	50	0.5927	180	2.13371266
KINGFISHER STRONG	47	0.55714	160	1.89663348
KINGFISHER DRAUGHT (CAN 500 ML)	85	1.00759	180	2.13371266
KINGFISHER ULTRA	80	0.94832	200	2.37079184
KINGFISHER BLUE	55	0.65197	150	1.77809388
LONDON PILSNER	48	0.56899	160	1.89663348
HEINEKEN	120	1.42248	240	2.84495021
CARLSBERG GREEN	65	0.77051	190	2.25225225
CARLSBERG ELEPHANT	90	1.06686	190	2.25225225
TUBORG GREEN	110	1.30394	220	2.60787103
TUBORG STRONG	65	0.77051	180	2.13371266
PALONE 8	55	0.65197		
INDUS PRIDE	41	0.48601	130	1.5410147
MILLER HIGH LIFE	90	1.06686	195	2.31152205
FOSTER'S	60	0.71124	155	1.83736368
HAYWARDS 5000	47	0.55714	NA	NA
KNOCK OUT	47	0.55714	NA	NA
ROYAL CHALLENGE	31	0.36747	NA	NA
BUDWEISER	67	0.79422	195	2.31152205
STELLA ARTOIS	230	2.72641	420	4.97866287
HOEGAARDEN	250	2.96349	475	5.63063063
LEFFE BLONDE	300	3.55619	565	6.69748696
DUVEL	450	5.33428	980	11.61688
CHIMAY RED	319	3.78141	825	9.77951636
ASAHI	225	2.66714	435	5.15647226
CORON EXTRA	195	2.31152	275	3.25983879
SOL	200	2.37079	310	3.67472736
LONDON PRIDE	200	2.37079	415	4.91939308
SAN MIGUEL PALE PILSEN	110	1.30394	215	2.54860123

ERDINGER WEISSBIER BEER	280	3.31911	440	5.21574206
SCHNEIDER WEISSE	350	4.14889	575	6.81602655
MURPHY'S BLACK STOUT (CAN 440 ML)	350	4.14889	675	8.00142248
GUINNESS DRAUGHT (CAN 440 ML)	335	3.97108	720	8.53485064
AMSTEL	250	2.96349	335	3.97107634
BECKS	120	1.42248	235	2.78568042
ESTRELLA	240	2.84495	325	3.85253675

COMPARISON BETWEEN RETAIL AND INSTITUTIONAL PRICING



CUSTOMS DUTY FOR INTERNATIONAL BRANDS

- Chapter 22: Beverages, spirits and vinegar.
- HS Code: 2203
- Product name: Beer
- CIF Value of the Product: 100 (Hypothetical value)

VALUE AND DUTY DESCRIPTION	CUSTOM DUTY RATES	CALCULATED AMOUNT	FORMULA
Assessable Value(AV)		101	CIF Value + Landing Charges (at 1 % of CIF Value)
Basic Duty of Customs (%)	100 %	101	$(AV \times BD \text{ rate}) / 100$
Basic Duty Pref (%)	0%	0	$(AV \times BD \text{ Pref rate}) / 100$
Additional Duty of Customs (CVD) (Including Cess, if any) (%)	0 %	0	$(AV + BD. \text{ Amt.}) \times CVD \text{ rate} / 100$
Central Excise Education Cess (%)	0 %	0	$(CVD \text{ Amt.}) \times \text{Central Excise Edu. Cess Rate} / 100$
Customs Education Cess (if any) (%)	0 %	0	$(BD \text{ Amt.} + CVD \text{ Amt.} + Edu. \text{ Cess. Amt.}) \times \text{Custom Edu. Cess Rate} / 100$
Special Additional Duty of Customs (Spl.CVD) (if any) (%)	0 %	0	$(AV + BD \text{ Amt.} + CVD \text{ Amt.} + Edu. \text{ Cess. Amt.} + \text{Custom Edu. Cess Amt.}) \times \text{Spl. CVD Rate} / 100$
Total Customs Duty		101	BD Amt. + CVD Amt. + Edu. Cess Amt. + Custom Edu. Cess Amt. + Spl. CVD Amt.
Landed Price of the Product		202	State taxes and excise duties will be added to the landed price upon arrival in India

All goods (HS Code: 2203) put up in bottles or cans or any other packing for ultimate sale in retail and having a CIF price:

- Not exceeding \$25 per case: 75 % ad valorem tax
- Exceeding \$25 but not exceeding \$40 per case: 50 % ad valorem tax or \$37 per case whichever is higher
- Exceeding \$40 per case: 20 % ad valorem or \$40 per case whichever is higher

The rationale behind increasing taxation on alcohol as a policy measure is relatively simple - by making beverage alcohol more expensive, per capita consumption will be decreased and with it the incidence of problems. The public health perspective, which is not necessarily concerned with economic efficiency or corporate profitability, sees curbing alcohol consumption as a means of preventing a range of social and health problems and reducing the alcohol related burden on society. With this reasoning in mind, many governments implement a range of measures limiting the physical availability and economic accessibility of alcohol. Taxation is used as a means to limit the demand for alcohol by raising its cost, making it less accessible to consumers. The effectiveness of taxation as a public health and social tool for reducing consumption, abuse and problems has been much debated. There is evidence that increasing the price of alcohol limits its purchase by some people. Public health researchers are particularly interested in such a population level strategy when per capita reductions in alcohol consumption also can be shown to reduce alcohol related consequences, both chronic (e.g., liver cirrhosis) and acute (e.g., violence and injuries) problems.

Excise taxes are indirect taxes on the sale or use of specific products or transactions. The tax is often passed on to people and organizations that purchase particular products or services. A tax based on the presence of alcohol in a product is an excise tax; other examples of excise on products include tobacco, energy (oil and gas taxes), and waste (trash containers). Unlike value added taxes and sales taxes, excise tax is usually not a function of the value of the product being taxed, but rather a fixed rate tax or specific tax, expressed as a monetary amount per quantity, not value, of the product.

BELGIAN CUSTOMS ATTACHE IN DELHI

The European Commission has launched the first phase of a new web portal to help businesses to understand and follow the customs procedures for importing goods into and exporting goods from the EU. Designed as a single point of access to relevant and practical information, the portal includes animated scenarios to explain each step of the import, export and transit procedures. It also outlines the legal framework for such procedures, and includes information (such as policy information, databases and assistance services) taken from Commission and Member States' customs websites. This first stage of the "European Customs Information Portal" (ECIP) focuses on the application of the Safety and Security Amendment to the Customs Code, which entered into force on 1 July 2009. The customs portal was developed together with Member States and the Trade Contact Group, and will be further extended in the future to cover other areas and provide more in-depth information on customs procedures.

For further information:

<http://ec.europa.eu/ecip/>

Tasks of the Customs Attachés

The creation of a worldwide network of customs attachés is one of the tools through which the Belgian Administration of Customs and Excise will manage to create and develop relationships with foreign administrations and businesses. These agents will have as a primary and fundamental mission the exchange of information that will permit, as defined above, to reconcile in an efficient manner two apparently opposite logics (speed/security of the trade flow). Its creation has to be situated in the need for international operational cooperation.

In practice, they have the following tasks:

- Mission to protect the logistic chain:
- Mission to combat fraud:
- Mission of customs diplomacy and economic role:

Below are the full contact details of the Customs Attachés in New Delhi, India:

Werner VAN DER CRUYSEN

Embassy of Belgium – Customs Attaché

206, Jor Bagh Road (2nd floor)
New Delhi 110003, India
Tel/Fax: +91 11 43 59 67 41
GSM + 91 99 58 58 14 90
E-mail: werner.vandercruyssen@minfin.fed.be

Regulations' governing the labelling and packaging of food and beverage products being marketed in India forms an important aspect of import procedure. Apart from high customs duties and state taxes, companies shipping alcoholic products should keep in mind some of the rules laid down by the Food Safety and Standards Authority of India (FSSAI) for every pre-packaged food and beverage sold in the market.

Language permitted to be used for labels – English, Hindi or Devnagiri.

Information on the label should be legible.

Label should be applied in the manner that they do not separate from the product container.

Information on the label should contain details such as - the name of food or beverage, including the trade name or description of food contained in the package, list of ingredients. The list of ingredients shall contain an appropriate title, such as the term "Ingredients". The name of Ingredients used in the product shall be listed in descending order of their composition by weight or volume, as the case may be, at the time of its manufacture.

In case the manufacturer is not the packer or bottler, the name and complete address of the packing or bottling unit as the case shall be declared on every package of food.

Imported food and beverage products imported shall also carry the name and complete address of the importer in India, the name of the country of origin of the food article, the net content by weight or volume or number, as the case may be, shall be declared on every package of food; a batch number or code number or lot number which is a mark of identification by which the food can be trace in the manufacture and identified in the distribution, shall be given on the label, special instructions for storage or use (if applicable), bar codes (if applicable) are issued by EAN (European Article Numbering) at New Delhi, market retail price, including taxes, duties, transportation, date , month and year of manufacture and packing or pre-packing if "best before" less than 3 months only month and year if "best before" is more than 3 months

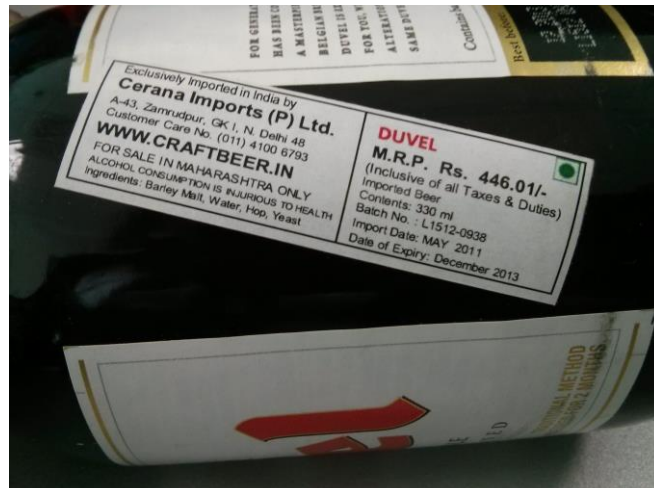
The labels can be of particular shape and size such as:

- Rectangular- 40% of H x W of the panel having largest area
- Cylindrical/round/oval OR near cylindrical/round/oval – 20% of H x average circumference of such container
- Other Shape – 20% of total surface area of container

Except where there is label, securely affixed – label shall give a surface area of not less than 10% of total surface area of container

Provided that in case of package having a capacity of five cubic centimeters or less, the principle display panel may be card or tape affixed firmly to the package or container and bearing the required information under these rules

Sample of labelling on Duvel bottles indicating some of the above rules prescribed by Food Safety and Standards Authority of India (FSSAI)



Some important websites which will provide further information on the regulations:

Ministry of Commerce and Industry, Directorate General for Foreign Trade
<http://dgft.delhi.nic.in/>

National Government portal
<http://india.gov.in/govt/policies.php>

Food Safety and Standards Authority of India
<http://www.fssai.gov.in/>

CHALLENGES IN THE MARKET

Due to strong entry barriers and numerous taxes, existing liquor players are likely to maintain their strong position in the market. Brands with a strong sub-segmentation strategy are likely to expand categories and brand strength, as brand building methods are limited due to the ban on liquor advertisements. However, pricing power is a concern in the face of volatile raw material costs, as state governments allow price hikes only once a year.

BAN ON ADVERTISING

Advertising of liquor products is banned in India. Liquor companies can promote brands only at points of sale. Brand creation through advertising is limited, though some companies advertise mineral water, CDs and cassettes. The restriction on advertising has helped domestic brands maintain market leadership. It has also helped regional players maintain their unique identity. Foreign brands, even if launched in India, will find difficulty in promoting brands, as brand creation is extremely challenging.

As advertising is banned in the sector, the creation of a new brand is difficult. The restriction on stock keeping unit (SKU) sizes (limited to five SKU varieties) and the limited number of retail stores also hampers brand building. Launching new brands also requires permission. The brand needs to be registered in every state and with the CSD (Canteen store department – managed by armed forces). Consequently, the creation of new brands is difficult.

REGISTERING A BRAND WITH THE CANTEEN STORE DEPARTMENT IS DIFFICULT

Almost 15% of liquor sales take place in the military's canteen store departments (CSD). To sell brands through CSD outlets requires prior registration, a process that takes close to nine months. Also, CSD outlets have stringent policies on quality, supply chains and distribution fee structures. If a company is not able to register a brand with the CSD, it would be unable to attract a large number of consumers. CSD is crucial for driving growth in south India, which accounts for 59% of liquor consumption in India.

IMPORT DUTIES ON INTER-STATE TRANSFERS

Foreign alcohol and liquor brands attract high custom duties for exporting products to India, in addition to the custom duties, company's needs to pay excise duty for selling liquor across states. Liquor manufactured and sold within a state attracts lower excise duty. The higher excise duty on liquor from other states results in a higher price, which leads to lower off take. Also, these 'imports' are allowed only through a quota system, which restricts the quantity being imported. As a result, almost all liquor manufacturers are compelled to set up distilleries in every state. Higher state taxes also result in higher prices.

DISTRIBUTION IS A KEY ENTRY BARRIER

Distribution of liquor varies by state. In some states, such as Tamil Nadu, Kerala and Delhi, the government acts as distributor and markets it through its own shops. In Uttar Pradesh, Andhra Pradesh and Karnataka, distribution is semi-controlled by state governments. Governments act as distributors and the retail sector is not controlled. In other states, such as Maharashtra and Goa, distribution is free, as with any other consumer company such as Britannia Industries (biscuits), Colgate Palmolive India (toothpastes) or HUL (soaps). Four state governments (Gujarat, Nagaland, Manipur and Mizoram) have banned the sale of liquor within their territories.

PRICE HIKES LIMITED TO ONCE A YEAR

Liquor prices are determined by state governments once a year. Liquor companies can change prices once a year but are not permitted to alter these in the course of the year, irrespective of changes in raw material prices. The sector also faces progressive taxation, which dissuades price hikes, as it attracts higher taxes. States in which the government controls the liquor distribution

networks account for 70% of liquor consumption in India. As a result, the pricing power of liquor companies is weak. Unlike other consumer companies, liquor companies do not enjoy the advantage of correcting product prices based on raw material prices, media inflation, new launches, probable re-launches and competitive pressure.

Further, mis-pricing in the case of liquor companies products cannot be covered by offering freebies or by managing trade margins and discounts. A few companies are overcoming the price hike issue by using a premiumization strategy to pass on the volatile prices of molasses and glass, thereby improving realizations. As consumers are upgrading from country liquor to Indian made foreign liquor and from regular to premium alcohol, brands with premiumization strategies will continue to do well.

While Americans and Europeans prefer their beer to be light on alcohol content, Indians have traditionally been partial to a stronger brew, a preference that's become further accentuated of late along with an improvement in the image associated with such beverages.

The domestic market for strong beer grew faster in 2012 than in the past three years due to new product launches by foreign brewers and increasing sales of market leader Kingfisher Strong. Strong beer with alcohol content of more than 5 %, now accounts for more than 80 % of all beer sold in India. The Indian preference for strong beer led Carlsberg, Foster's maker Sab Miller and Anheuser-Busch InBev to launch brands tailored specifically to the market over the past two years. They include Tuborg Strong, Carlsberg Elephant and Budweiser Magnum, priced at par or higher than Kingfisher Strong.

Based on the experts, this year, the growth will be driven totally by strong beer. Strong beer will grow at some 15 % while mild beer will decline by 3-4 %. Beer with high alcohol content hasn't always had a great image in India, but that may be changing.

It has become more socially acceptable for people to be seen drinking strong beer because high-quality brands like Foster's, Carlsberg and Budweiser have launched in this segment. Earlier, people had no options when they wanted to move up from Kingfisher Strong.

Unlike the West, taste and refinement aren't factors for most drinkers in India. That is why strong beer is more popular as it has high alcoholic content. In the West, the positioning of beer is different - beer is seen as a refreshment drink.

Over the past three years, Kingfisher Strong and Sab Miller's Knock Out have reported higher growth than most other strong beer brands, whereas Haywards has lost market share, according to data provided by Euromonitor.

Tuborg Strong is Carlsberg's fastest growing brand in India, with sales having doubled in 2012. For United Breweries, which has more than 50 % share of India's beer market, Kingfisher Strong still drives growth.

To gain a larger share of the strong beer market, the company is expanding distribution of lesser-known Kingfisher Red, also a strong beer but 7-10 % more expensive than Kingfisher Strong. It's currently available only in north and east India.

Overall mild beer category is flat or declining, the 'super-premium' mild beers like Kingfisher Ultra, Heineken, Carlsberg, Miller High Life are growing.

Alcohol technology courses are rare in India. Following are some of the institutes and universities in the country offering courses relevant to the field of making alcohol.

Vasant Dada Sugar Institute

Website: www.vsisugar.com

Course Name: Alcohol Technology

Address: Manjari Budruk, Tal: Haveli, Dist.: Pune Maharashtra State, India, Pin – 412307

Telephone: EPABX: +91 20 26902100 (Hunting 15 Lines)

Fax: +91 20 26902244

Email: vsilib@vsnl.com (VSI Communications/ Administration)

Gurunanak Dev University

Website: www.gndu.ac.in

Course name: B.Tech sugar and alcohol technology

Address: Grand Trunk Rd, Off NH 1, Amritsar, Punjab, 143005, Guru Nanak Dev University, Amritsar, Punjab 143005

Telephone: +91 183 225 5711

Fax: +91 183 2258819

National Sugar Institute

Website: <http://nsi.gov.in/>

Course Name: Sugar Engineering / Sugar Technology / Alcohol Technology

Address: National sugar institute, P.O: NSI, Kalyanpur, Kanpur , Pin code: 208017, Uttar Pradesh

Telephone: + 91 512 2570541, 2570542, 2570543, 2573141, 2573142

Fax: + 91 512 2 570 247

Email: nsikanpur@nic.in

BEER CAFÉ - GURGAON

The booze culture in India is headed towards change, especially when the beverage under consideration is beer. Outlets serving the heady varieties of ale no longer wish to continue being tagged as a pub or a bar. Instead, their motto is to emerge as just another neighborhood cafe, serving pints and pitchers of beer as casually as they would hand out a cup of cappuccino.

Among the several other joints is 'The Beer Cafe', which not only tenders a bistro-like character but also manages to label itself as one by including the word 'cafe' in its name. Not to mention, it is one of the few such cafes in India to have 50 different varieties of beer from 17 countries on board.

While every other bar will boast their quintessential routine of happy hours, The Beer Cafe goes a step ahead and introduces the concept of 'Pour Your Own Beer' - PYOB. Three tap beers - Fosters, Stella Artois and Hoegaarden are on offer. What you need to do is, sign up for a RFID (radio frequency identification) activated beer card (minimum INR 500/ Euro 5.92) at the cafe and swipe it against the tap for a beer of your choice into the pre-chilled mugs available at the counter. Refill if you must until the card runs out of credit. The idea is to make different varieties of beer available - you may choose to drink half a mug of Fosters and then move on to tasting a bit of Hoegaarden. Remember, you get charged only for the amount of beer tapped out of it. PYOB works well because the RFID card allows you to stop for a swig of beer at all its five outlets in Delhi. Also, the card is yours to keep for life. The Beer Cafe is the first of its kind to attempt the PYOB concept in India and a very successful one at that.

Source: Times of India article 'Beer and bites galore at The Beer Café' - Date: Jan 30, 2014

PINT ROOM – PAN INDIA

Pradeep Gidwani is a man with a dream. Many would call it a pipedream, but Gidwani insists it can come true. He wants to make beer as easily available and as widely consumed as coffee in India. To realise his dream, the former CEO of two leading beer brands, Carlsberg India and Foster's India, has turned entrepreneur.

He is founder of 'The Pint Room', begun in July last year, which already has five outlets - two in Mumbai, one each in Delhi, Panchkula near Chandigarh, and Bangalore - and intends to raise their number to 20 by the end of this year. "We want to be the Starbucks of beer," he says.

Indeed, The Pint Room is his second effort. Initially he started in December 2010, when he launched 'The Beer Café' in partnership with Rahul Singh, former Executive Director (Apparel) at sportswear retailer Reebok India, in Delhi's Vasant Kunj.

"My idea of a beer cafe is one which looks less like a bar or a pub, and more like a coffee shop," says Gidwani. "I want to create a space where conversations can be had over beer, without loud music or dim lights."

He joined hands with Singh because of the latter's wide experience in retail. Today, The Beer Cafe is competition. The partners developed differences and ultimately Singh bought the brand from Gidwani.

But Singh shares Gidwani's conviction that beer could outsell coffee one day. His outlet in Delhi's Connaught Place is sandwiched between two coffee shops - one run by the coffee chain Cafe Coffee Day and the other by its rival, Costa Coffee. "I want to take away their market share," he says.

Gidwani is not fazed. "Before the coffee chains established themselves, sceptics used to say we were a tea drinking nation. Now everyone can see the success of coffee," he says.

How are the fledgling beer chains doing? Both The Pint Room and The Beer Cafe have around 40 brands on offer from local ones such as Kingfisher to imported premium ones such as

Chimay from Belgium and Estrella Damm Inedit from Spain.

Prices range from Euro 1.5 - 12 a bottle. While Gidwani is reluctant to discuss figures, Singh says he had a turnover of around 50 million in 2012/13, with a profit margin of 20 per cent. Mayfield Fund, a California-based private equity firm, has pumped \$5 million into The Beer Cafe for a minority stake, and Singh expects his revenue to quadruple this year as, flush with funds, he opens more outlets.

Source: India Today Article 'Buzzed on Beer' Date - June 23, 2013

ROCKMAN'S BEER ISLAND - GURGAON

'Rockman's Beer Island' in Gurgaon serves four beer varieties brewed on the premises of the pub. Here, patrons can see the imposing copper mash and wort kettles and the stainless steel fermentation/storage casks from which beer is dispensed through taps at the pub counter.

Of the three main outlets at Rockman's — Bavarian, Keg & Barrels, and Rockdome — Bavarian is a German-style pub brewery that promises authentic German cuisine. At Bavarian, beer is produced according to the 'Reinheitsgebot', also called the Bavarian Purity Law, which stipulates that beer be brewed only from four natural ingredients — malt (from barley or wheat), hops, yeast and water. While the first three ingredients are imported from Germany, the fourth is treated at a special plant in Gurgaon. As if that wasn't enough — the monstrous tanks and barrels are supplied by Kaspar Schulz (Bamberg), a three century old German manufacturer of brew systems.

Shobhit Kumar, unit head, 'Rockman's Beer Island', vouches for the beer's kosher preparation: "We don't use preservatives to give a longer shelf life to our beer, nor do we use unnatural CO₂. The CO₂ the beer contains is naturally produced during fermentation."

Lager: With an alcohol content of 4.5 per cent, the lager is smooth and leaves an unobtrusive aftertaste of roasted barley.

Lager strong: It has the highest alcohol content (7 per cent) and tastes as smooth. The roasted barley feel is stronger and lingering.

Dark: Containing more hops and 5.3 per cent alcohol, this is a darker and bitter variant.

Wheat beer: The most popular beer at Rockman's is also the smoothest and the tastiest because instead of roasted barley, you now have a sweet, wheaty taste. It's low on alcohol content (only 4 per cent) and high on calories (265 cal/500ml).

Source: Live Mint & the Wall Street Journal Article 'Lounge Review | Rockman's Beer Island, Ambience Mall, Gurgaon' – Date: 15 May 2009

MOB - HYDERABAD

MOB - the city's first Belgian beer café offers refreshing whites to trappist beers of the monks, and an insight into brewing traditions

Like most travelers, friends Chalapathi Raja, Vikas Passary and Vijay Patwari were enamoured by Belgian beers. They visited heritage breweries and savoured everything from the fruity 'La pecheresse' (2.5% alcohol) to the dark 'Westmalle Dubbel' (a Trappist beer with 7% alcohol). Vikas, being a restaurateur (Little Italy and So), wondered if opening a Belgian beer café would be feasible in Hyderabad and Chalapathi Raja was game. "We made three trips and short listed 16 beers — four tap beers and 12 bottled ones. We choose different varieties — Belgian - French and Belgian - German beers. Each of these has a history that dates back to the World War," says Chalapathi.

At first, a few people walked in thinking this is a pub. But within a few days, the more mature, beer-understanding clientele began to drop in. Welcoming is one way to describe the ambience

of the café. The interiors are in muted browns and the décor is simple with wooden furniture. The café has indoor and al fresco seating.

On a single platter, you can get four tap beer variants, each 170ml, to taste and order. These beers are served from specially installed taps brought in from Italy. The frosted taps ensure the temperature of the beer remains the same, from the base to the nozzle of the tap. Witte, Abbey Blond, Dubble Blond and Divine are the four tap beers, priced between Euro 4.26 and 4.91 for 330ml.

The menu has brief notes on the brewing traditions of Belgium and the styles of beer (white, abbey, special, fruit, blond, special blond, tripel, strong dark and the Trappist varieties brewed by monks). The food menu is a mix of international and Indian cuisine styles, both vegetarian and non-vegetarian. These are Tapas-style platters and Vikas informs that the team plans to offer sumptuous main-courses soon.

Source: The Hindu Article 'Cheer for Beer' Date - October 3, 2013

BIERE CLUB - BANGALORE

Meenakshi Raju and Arvind Raju, siblings, were vacationing in Singapore's 'Brewers', a famous microbrewery, when an idea stuck; they wondered "why wasn't there a microbrewery in India's beer capital, Bangalore?" They were gung-ho about the idea and came back to India with a whole host of plans. "But we ran into some bureaucracy. It took us two years to convince the government about the concept and get licences to build the microbrewery," says Arvind Raju, director of the 'Biere Club' in Bangalore. After completely reworking and strengthening the structure of an old KPMG office, the brewery was ready.

Aptly titled the 'Biere Club', it has its own brand under the same moniker and for casual visitors this place is just another pub restaurant. But go beyond the kitchens you will see this restaurant transform into a brewery.

Inside it is a plethora of activity. Brew master Daniel Wambua from Kenya makes 500 litres of beer every day. The brew house is carefully equipped with fermentation tanks, mashing units and conditioning units. For beer lovers this is a haven of choices, there are ales, lagers, wheat beers and stout. It does not stop here; there are occasional and seasonal brews, which the microbrewery is already working on.

The kitchen serves Mediterranean food, cooked by Shaun Kenworthy, a chef who specialises in gourmet food, from the UK. The promoters have spared no expense and have launched craft brewery in Indian. Craft brewery globally means a small brewer who takes all the time in making the ale and serves it to the local community.

Source: The Economic Times Article 'Toit, Doolally, Rockman's Beer Island, Hops n Grains and The Biere Club chart out national rollout plans' – Date 29 Aug 2011

DOOLALLY - PUNE

Suketu Talekar and Prateik Chaturvedi left their high-profile jobs with P&G in Singapore and started Doolally, Pune's first microbrewery, with a desire to make a beer that would not only taste natural but also proclaim its Indian genesis. It all started at a microbrewery in Singapore which the two friends used to frequent for their daily quota of beer. "The beer we used to have at Brewerkz made us realise what we had in India was not beer in the true sense of the word. It was like a revelation for us," recounts Talekar, an IIM Bangalore graduate, who left his job in 2005. While Talekar was surveying the beer scene in Pune, Chaturvedi, an IIM Calcutta graduate, interned with Brewerkz for three months to observe the process and business of microbrewing for a first-hand feel.

Enter Oliver Schauf. Since neither Talekar nor Chaturvedi was a brewmaster, they needed a third partner who would share their vision. Oliver Schauf, a German brewer who was brewing in Greenland and had 15 years of experience in the trade relocated to Pune in April 2009. He

advised the team on brew systems and coordinated with the suppliers through emails and chats.

Currently, Doolally serves two staples — a German-style wheat beer and an apple cider. The brewery also offers two or three monthly varieties that could be anything from jaggery beer or pomegranate cider to Schauf's special salted beer. In the past 19 months, 25 unique brews were served here, and some of Schauf's current experiments include a millet-based beer, a passion fruit cider and a beer made from karwanda berries, which are indigenous to Maharashtra.

A pint of Doolally is priced Euro 1.77, but this doesn't look overly expensive given the price of a glass of industrial beer at a bar, which generally costs about Euro 1.65. As Talekar says, "Beer is a democratic, blue-collar beverage compared to champagne, wine and scotch so a higher price would only discourage potential customers."

Source: Business world Article 'Getting Fresh' – Date 29 Jul 2011

SHIVSU CANADA PURE FILLERS COLLABORATE WITH BELGIUM'S PRODEB BREWERY

Shivsu Canada Pure Fillers Pvt. Ltd. (SCPF) has recently entered into a Joint Venture with Belgium based M/s. PRODEB Brewery and Technology who are the leaders in brewery equipment to provide total turnkey solutions for microbreweries / brew pubs (a microbrewery is a small brewery with a limited production capacity which produces hand-crafted beers).

The demand for beer is growing at a steady rate in India and Shivsu wants to capitalize the opening of microbrewery licenses by the government in several states in India. It expects to establish at least 75 to 100 microbreweries at an investment of INR 10.50 million to INR 20 million each by the end of 2011-12 in various states in India amounting to a turnover of INR 1 billion to 1.5 billion annually and job opportunity to over 1500 people.

According to Mr. Sushilkumar Eashwaran, Technical Director of SCPF, "the Indian market for different types of beers available in Europe is still at a nascent stage in India. Due to a clear policy of licenses for microbreweries / brew pubs by various state governments in India the growth of European traditional beer is bent to attract and satisfy the taste buds of millions of consumers."

Canada Pure Fillers plans to launch through these microbreweries and brew pubs not just regular lager or ales but also many exiting flavors of beers such as Apple, Peach, Litchi, Kriek and Chocolate. It also expects to launch Stout beers as well as artizanal beers as well as a special beer for women in the offing. The alcohol level present in the microbrewery / brew pubs will range from 3 to 8%. The company has a team of reputed brew masters from Belgium who would share the recipes and train the Indian companies to produce great tasting beer. In the process, SCPF has launched equipment with a joint venture with PRODEB Brewery Technology from Belgium.

SCPF - a member company of Shivsu Group – is into the business of establishing bottle water , soft drink, juice etc. Since its establishment in the year 1969, it has pushed its boundaries to include various business activities like pet bottle blowing machine, pet bottle rinser filller capper, glass bottle washer filler capper, polycarbonate washer filler capper, liquor and beverage packaging machinery. With the setting up of microbreweries, the company targets an additional turnover of INR 1.5 billion in the coming financial year. In the next three years the company plans to venture into African, European and American markets, and also foray into large brewery project of 50000 HL to 100000 HL per annum.

PRODEB Brewery technology is the company based out of Brussels, Belgium. Who are in the business of manufacturing and consulting technologies for microbrewery. PRODEB has the expertise to deliver the latest Belgium technology along with renowned brew masters to produce the great tasting beers.

PRODEB has under its banner several brands of microbrewery in Belgium. The beers from these microbreweries are sold worldwide. PRODEB brewery technology also provides reliable raw

materials for beer manufacturing from Belgium. PRODEB has an exclusive Joint Venture agreement with Canada Pure Filters for Worldwide market.

Source: Canada pure fillers Article 'Shivsu Canada Pure Fillers ties up with Belgium's Prodeb Brewery to Launch Micro Brewery Equipment'- Date: July 2011

CERENA IMPORTS

Delhi based 'Cerana Imports', importers of premium beers, has added two premium Belgian beer brands — Duvel and Liefmans to its portfolio. These two premium brands of Duvel Moortgat, one of the largest family owned breweries in Belgium, will be available in India as well.

Bram Vaerewyck, Export Manager, Duvel Moortgat, said that India is ready for speciality beer like Duvel and the discerning beer consumers here are looking for new taste. "We are a family-owned brewery with wide portfolio of beers and Duvel is our flagship brand. We are confident about our India foray and looking forward to long-lasting relationships in the Indian market."

Being premium beers, Cerana Imports plans to foray into the 'Class A+ outlets' in Tier I cities of the country, like Delhi, Mumbai, Kolkata and Chennai. Ankur Jain, Director, Cerana Imports said, "In the first phase, we want to concentrate on luxury hotels and bars in the urban metropolis."

Source: Hospitality Biz Article 'Cerana Imports introduces premium Belgian beers in Indian market'-Date 31 Jan 2011

ALLIED BLENDEES AND DISTILLERS PVT. LTD

Address: 2nd Floor, Bandbox House, Dr. Annie Besant Road, Worli, Mumbai - 400 030
Telephone: +91 22 43001111
Fax: +91 22 43001116
Email: info@abdindia.com
Website: www.abdindia.com
Contact Person: Sudhir Jain
Designation: Manufacturing operations Head
Details: Allied Blenders and Distillers Pvt. Ltd. (ABD) is a company promoted by Mr. Kishore Chhabria. He has been spearheading the business for over twenty years. ABD is a leading name in the Indian made foreign liquor (IMFL) segment. They mainly manufacture whiskey, rum, vodka and brandy.

BRINDCO SALES LTD.

Address: 1st floor Solaries Bldg No II, Opp L & T GATE No 6, Saki Vihar Rd, Andheri East, Mumbai - 400059
Telephone: +91 22 28578133, 28578134, 28578196
Fax: +91 22 28578197
Email: nixon.dmello@brindco.com , nixondmello@gmail.com
Website: www.brindco.com
Contact Person: Nixon Dmello
Designation: Head Western India
Details: Leading importer and distributor of alcoholic beverages

IMPALA DISTILLERY & BREWERY LTD

Address: Assolda, Quepem, P.O. Chandor, Goa – 403714
Mobile: +91 9822101143/8888884899
Email: vijaymontecruz@impalagoa.com
Website: www.impalagoa.com
Contact Person: Vijay Cruz
Designation: Director
Details: Brewed and bottled in Goa with imported German hops, the two home brands marketed by the company are Belo and Kings

MANSHA AGENCIES PVT LTD

Address: Ask House, 106, Marol Co-op Industrial Estate Andheri West, Mumbai – 400059
Telephone: +91 22 4030 3001 / 4030 3030
Mobile: +91 98 203 45383
Email: yohan@mansha.net.in , yohan1875@gmail.com
Contact Person: Bhupinder Singh / Rakesh Jalan
Designation: Owner

Details: Distributor of wine shops, liquors & spirits in Mumbai.

MOHAN BROTHERS PVT. LTD

Address: 59/2654, Safalya Co-op Housing Society, Gandhi Nagar, Bandra - (East) Mumbai – 400051

Telephone: +91 22 26423037

Fax: +91 22 26423840

Email: mumbai@mbpl.net , rohit@mbpl.net

Website: www.mbplindia.net

Contact Person: Sunil Biradar , Rohit Mehra

Designation: Business Development Manager, Director

Details: Importers of beverages, beer, wine and alcohol. They stock brands such as Heineken, Tiger Beer including Geist Belgian beer.

NASHIK VINTNERS PVT LTD - SULA VINEYARDS

Address: 3rd Floor, A wing, Todi estate, Sun Mill compound, Lower Parel, Mumbai – 400013

Telephone: +91 22 67211900/61280606

Fax: +91 22 24926064

Email: rajeevs@sulawines.com

Website: www.sulawines.com

Contact Person: Rajeev Samant

Designation: CEO

Details: Sula Wines is one of the leading local wine brands in India.

KHEMANI GROUP

Address: Ringanwada, Kachigam Road, Daman, Daman & Diu - 396 191

Telephone: +91 22 2242672/2242872

Fax: +91 22 2242673/2243778

Email: enquiry@khemanigroup.com

Website: www.khemanigroup.com

Contact Person: Suresh Khemani

Designation: Director

Details: Khemani's are also India's leading manufacturers, distillers, blenders, and bottlers of all kinds of potable liquor.

MAGPIE GLOBAL LTD

Address: Kapadia Chambers, Dana Chambers, Devji Ratansey Marg, Mumbai - 400009

Telephone: +91 22 66151131-34

Fax: +91 22 66151135

Mobile: +91 9820042519

Email: magpie1@ttml.co.in

Website: www.magpieglobal.com

Contact Person: Deepshikha Garg
Designation: MD
Details: Importers of alcoholic beverages, beer, liquor, wines and champagnes, cigarettes and Toiletries. Beer brands include Grolsch premium lager, Holsten, Heineken. Magpie Global Ltd. has successfully obtained exclusive distributorship from prestigious multinational companies such as Bacardi Martini S.A., Germany, Bardinet S.A., France, Grolsch International B.V., The Netherlands, Brown Forman Worldwide LLC, U.S.A. , Beam Global, U.K. , William Grants & Sons, U.K. , Phillip Morris Co. , U.S.A.

BHANDARI GLOBAL VENTURES PVT LTD.

Address: T 3 / F 903, Uniworld Gardens, Sohna Road, Gurgaon 122001
Telephone: +91 124 4143087
Mobile: +91 98100 43143
Email: sukesh@romboutsindia.com
Contact Person: Sukesh Bhandari
Designation: Managing Director
Details: A leading importer and distributor of foreign alcohol and spirits in India

HEMA CONNOISSEUR COLLECTIONS PVT LIMITED

Address: B 179, Okhla Industrial Area Phase I, New Delhi – 110020
Telephone: + 91 11 41032500
Email: info@hema.in
Website: www.hema.in
Contact Person: Amit Agarwal
Designation: Director
Details: Hema Connoisseur Collections (P) Limited is part of the Hema Group of Companies and is engaged in the imports and distribution of various international products in India and caters to the embassies, hotels, restaurants, clubs, resorts and retail market. It is a Delhi based organization having an office and a warehouse in Delhi.

INDO SPIRITS DISTRIBUTION LTD

Address: B – 230, Okhla, Phase – 1, New Delhi – 20.
Telephone: +91 9599005000
Mobile: +91 9811005000
Email: sm@indospirit.com
Website: www.indospirit.com
Contact Person: Sameer Mahandru
Designation: Managing Director
Details: Indospirit is a Leading Importer and Distributor of Alcoholic & Allied Beverages in North India.

HIGH SPIRITS

Address: 200 B , Pocket C, Sidhartha Extn, New Delhi 110014
Mobile: +91 9810603333

Email: sanjeev@high-spritexim.com
Contact Person: Sanjeev Gupta
Designation: Managing Director
Details: Importer and distributors of beer and other alcoholic beverages

FLEMINGO INTERNATIONAL

Address: D-73/1, TTC Industrial Area, MIDC, Turbhe, Navi Mumbai - 400 705. INDIA
Telephone: +91 22 66269999
Email: atulahuja@flemingo-intl.com
Website: <http://flemingo-intl.com>
Contact Person: Atul Ahuja
Designation: CEO
Details: Duty free liquor and spirits retail chain.

CERENA IMPORTS

Address: A-43 Zamrudpur, Ground Floor, G.K. 1, New Delhi - 110 048
Telephone: +91 11 46536793
Mobile: +91 99104 19997
Email: ankur@cerana.in
Website: www.craftbeer.in
Contact Person: Ankur Jain
Designation: Director
Details: Cerana Imports Private Limited is a premier importer and distributor of craft beverages in India. They are one of the leading importers of Belgian beers in India, they are also importing beers from Germany, France, Netherlands and the United States.

PRESTIGE WINES & SPIRITS PVT LTD.

Address: 26, Sarvodaya Industrial Estate, Off Mahakali Caves Road, Andheri (East), Mumbai – 400093
Telephone: +91 22 42151376
Mobile: +91 9819435069
Email: sanal@prestigewinesandspirits.com
Website: www.prestigewinesandspirits.com
Contact Person: Sanal Kumar
Details: Supplier to the Belgian Consulate, an Indo-European venture that promotes and imports premium wines and spirits. The venture is promoted by Mr. Gautam Thapar (Chairman, Avantha Group) and other Indian entrepreneurs along with Mr. Miguel A. Torres (President, Torres Group) and Mr. John L.S. Grant (Chairman, Glenfarclas).

FINE WINES N MORE (FWM)

Address: 113, Raheja Plaza, Plot No. 15/B, Parksosns Press Compound, Andheri (W), Mumbai – 400053
Telephone: +91 22 40330000
Fax: +91 22 4033 0100
Email: info@finewinesnmore.com , craig@finewinesnmore.com
Website: www.finewinesnmore.com
Contact Person: Craig Wedge

Designation: COO

Details: FWM's core focus lies in the import, brand building, distribution, marketing and sales of 150 fine products from 35 leading wine, fresh juice and spirit companies from around the world. Interested in introduction of Belgian beers.

ASPRI SPIRITS PVT. LTD.

Address: 301, Lavlesh Court, Pandit Varde Road, Bandra West, Mumbai 400 050

Telephone: +91 22 26401995

Fax: +91 22 26401997

Mobile: +91 9820317899/ 9730027721

Email: mail@aspri.org

Website: www.aspri.org

Contact Person: Sumedh Singh Mandla

Designation: CEO

Details: Supplying to the shipping lines, Star Hotels, Indian Navy and the Diplomatic fraternity including the Belgian Consulate

CHINCHOLI WINES**Address:** Opp. Nirlon H.S.G Society, Malad(West), Link Road, Mumbai - 400064**Telephone:** +91 22 28712629/ 28770376/ 28767163/ 32682870**Mobile:** +91 9987712201**Email:** chirag@chincholiwines.com**Website:** www.chincholiwines.com**Contact Person:** Mr. Chirag**Designation:** Owner**Details:** Exclusive walk in boutique for wines, cognac, scotch , single malt, vodka, gin, tequila, beers, liqueur, martini, bourbon whiskey, champagne etc. from all around the globe. Also include several imported Belgian beers.**LIVING LIQUIDZ****Address:** Sani Armaa, Raut Lane, Opposite Hare Rama Hare Krishna Temple, Juhu, Vile Parle West, Mumbai 400056.**Telephone:** +91 22 61500700 / 701**Mobile:** +91 9702715719**Email:** info@livingliquidz.com / moksh@livingliquidz.com**Website:** www.livingliquidz.com**Contact Person:** Reji Muralidharan**Designation:** Manager**Details:** Living Liquidz has pan India tie ups with hyper city, Spencer Retail, Foodland Fresh, Bharti Walmart, Wadhawan Retail Spinach, Aditya Birla More, Jonny Walker Select etc, not only giving the best prices but also expanding at a soaring rate covering major areas for easy access.**HYPERCITY RETAIL****Address:** Paradigm - 'A' Wing, 1st Floor, MindSpace, Malad (West), Mumbai – 400064**Telephone:** +91 22 40695555**Email:** ashutosh.chakradeo@hypercityindia.com**Website:** www.hypercityindia.com**Contact Person:** Ashutosh Chakradeo**Designation:** Head Buying and merchandising**Details:** One of the leading large format retail chains in India**FUTURE GROUP****Address:** Knowledge House, Shyam Nagar Off Jogeshwari Vikhroli Link Road, Jogeshwari East, Mumbai 400060**Telephone:** +91 22 3084 1300**Mobile:** +91 9323994718**Email:** Avinash.Tripathi@futuregroup.in**Website:** <http://futuresretail.co.in>**Contact Person:** Avinash Tripathi**Designation:** Senior Category Manager

Details: Future Retail is the flagship company of Future Group, India's retail pioneer catering to the entire Indian consumption space. Through multiple retail formats, we connect a diverse and passionate community of Indian buyers, sellers and businesses. The collective impact on business is staggering: Over 300 million customers walk into our stores each year and choose products and services supplied by over 30,000 small, medium and large entrepreneurs and manufacturers from across India. This number is set to grow.

GODREJ NATURE'S BASKET

Address: Gate No. 2, Pirojsha Nagar, eastern Express Highway, Vikhroli , Mumbai – 400079

Telephone: +91 22 251977 84/88

Mobile: manit.jana@godrejnb.com

Email: www.godrejagrovvet.com

Website: Manit Jana

Contact Person: Manager Imports

Designation: Retail store, selling high end products including alcohol

Details: Gate No. 2, Pirojsha Nagar, eastern Express Highway, Vikhroli , Mumbai – 400079

BEER CAFÉ

Address: 4th Floor, Ambience Mall, Gurgaon
Telephone: +91 124 466 53 71
Email: info@thebeercafe.com
Website: <http://thebeercafe.com/>
Contact Person: Rahul Singh
Designation: Founder
Details: An upcoming brewpub in the national capital region.

THE PINT ROOM

Address: Second floor, Ambience Mall, Nelson Mandela Road, Vasant Kunj Phase II, Vasant Kunj, New Delhi, Delhi
Telephone: +91 11 40870509
Website: www.thepintroomworld.com
Contact Person: Pradeep Gidwani
Designation: Owner
Details: A leading chain of lounge bar serving different varieties of beer from around the globe

ROCKMAN'S BEER ISLAND

Address: Level 4 Ambience mall, Gurgaon
Telephone: +91 124 2700000
Website: www.rockmangroup.com
Contact Person: Shobhit Kumar
Designation: Unit Head
Details: Rockman's beer island was one of the first microbreweries in India

MOB

Address: Level 2, Aryans, Road No. 92, Jubilee Hills, Hyderabad
Telephone: +91 40 40203311
Contact Person: Chalapathi Raja
Designation: Founder
Details: MOB is India's first exclusive Belgium Beer Bar which houses some of the Finest Beer brands from Belgium never before available in India.

BIERE CLUB

Address: 20/2, Vittal Mallya Rd, D Souza Layout, Ashok Nagar, Bangalore, 560001
Telephone: +91 80 42124383, +91 80 42124384
Website: www.thebiereclub.com

Contact Person: Minakshi Raju / Arvind Raju
Designation: Co- Founders
Details: One of Bangalore's very first brew pub, biere club serves ale, lager, stout and wheat beer

DOOLALLY

Address: The Corinthians Boutique Hotel, Nyati County, NIBM Annexe, South Pune, Pune 411060
Telephone: +91 20 26952226
Website: www.doolally.in/home.html
Contact Person: Suketu Talekar / Prateik Chaturvedi
Designation: Co- Founders
Details: Doolally was Pune's very first microbrewery.

ALL INDIA BREWERS ASSOCIATION

WORLD OF FOOD 2014

Website: www.worldoffoodindia.com

INDIA INTERNATIONAL FOOD AND WINE SHOW

Website: www.ifows.com

INTERNATIONAL FOODTEC INDIA 2014

Website: www.foodtecindia.com

FOOD AND BEV TECH

Website: www.foodbevtech.com

AAHAR INTERNATIONAL FOOD & HOSPITALITY FAIR 2013

Website: www.aaharinternationalfair.com

FOOD & GROCERY FORUM INDIA 2013

Website: www.foodforumindia.com

HOSPITALITY BUSINESS FAIR 2013

Website: www.hbf.co.in

FOOD INGREDIENTS INDIA 2013

Website: www.fiindia.ingredientsnetwork.com

MAGAZINES & PUBLICATIONS

UPPERCRUST – One of the leading magazines for food and beverage industry.

Website: www.uppercrustindia.com

AMBROSIA – MAGAZINE

Website: www.ambrosiaindia.com

BEVERAGE & FOOD WORLD JOURNAL

Website: www.beverageandfoodworld.com

- **India Hospitality Review**
Article: 'Accenture to solve licensing issues for hotels in Maharashtra'
Date: 07 Oct 2013
- **All India Brewers Association**
Report: Presented at the 'Food Regulatory Summit'
- **The Economic Times**
Article: 'Indian cheer for foreign Beer'
Date: 21 Feb 2011
Article: 'Sip traditionally brewed beers in Belgium'
Date: 22 Jan 2012
Article: 'SABMiller's sales jumps 20% in FY13'
Date: 8 Oct 2013
Article: 'Premium international beer brands bet big on India; shed the beverage's summer drink image'
Date: 15 Sept 2013
Article: 'Beck's & Stella Artois comes to India'
Date: 18 May 2007
- **Euromonitor International**
Report: 'Beer in India'
Date: Sept 2013
Article: 'Top beer brands in India'
Date: 18 Dec 2012
- **Anandrathi India Equities**
Report: 'Indian Consumer Alcoholic Beverages'
Date: 18 Apr 2012
- **Live Mint and wall street journal**
Article: 'Beer still a luxury for the average Indian'
Date: 29 Sept 2013
Article: 'United Breweries says Heineken India sales to rise 50% this year'
Date: 18 Apr 2013
Article: 'Mumbai to catch up on craft beer'
Date: 12 Dec 2012
- **Business standards**
Article: 'Kingfisher tops rivals in India's beer market'
Date: 3 Mar 2012
Article: 'Carlsberg expanding its beer portfolio in India'
Date: 5 Nov 2013
- **The Financial Express**
Article: 'Indian beer industry poised to grow 20 times'
Date: 22 Aug 2013
- **Just Magan – blog by Magandeep Singh**
Article: 'Indian Wine Imports Duties & Taxes Explained: Delhi, Maharashtra, Karnataka'
Date: 19 Nov 2012

Article: 'The Indian wine tax dilemma'

Date: 4 Dec 2011

- **Fine Food India**

Article: 'In High Spirits, Food & Beverage Business Review'

Date: 6 Sept 2011

- **International Centre for alcohol policies**

Report: Alcohol taxation

Date: May 2006

- **Daily News Analysis**

Article: 'Meet the men who finally opened Mumbai's first microbrewery'

Date: 3 Nov 2013

- **Reuters India**

Article: 'Stronger is better: brewers tap India thirst for potent beer'

Date: 24 Sept 2013

- **Times of India**

Article: 'Beer and bites galore at The Beer Cafe'

Date: Jan 30, 2014

Article: 'Tuborg breaks into list of India's top 5 beers'

Date: 22 Jun 2013

- **The Telegraph**

Article: 'What's brewing'?

Date: 21 Mar 2009

- **Bangalore Chamber of Industry and Commerce (BCIC)**

Report: Labelling Requirements for Pre- packaged Foods

Date: Oct 2012

- **Ambrosia: Food and beverage magazine**

Article: 'An ode to Flanders beer'

Date: May 2010

- **Hospitality Biz**

Article: 'Cerana Imports introduces premium Belgian beers in Indian market'

Date: 31 Jan 2011

- **Business World Magazine**

Article: 'Getting Fresh'

Date: 29 Jul 2011

- **The Hindu**

Article 'Cheer for Beer'

Date: October 3, 2013

- **India Today**

Article: 'Buzzed on Beer'

Date: June 23, 2013

TOM VERMEULEN

Trade and Investment Commissioner



RANJAN APTE

Invest Deputy



SHERLYNN D'COSTA

Trade Assistant



SOMA SENGUPTA

Trade Assistant



Flanders Investment and Trade

Consulate General of Belgium | 7th Floor TCG Financial Centre

C-53 "G" Block Bandra - Kurla Complex,

Bandra (E), | Mumbai - 400 051

E-mail: mumbai@fitagency.com

Website: www.flandersinvestmentandtrade.com

De informatie die u in deze publicatie vindt is bedoeld als achtergrondinformatie die u moet in staat stellen een beeld te vormen met betrekking tot de hierin behandelde materie. Zij is met de grootste zorg verzameld op basis van de beschikbare data en documentatie op het ogenblik van de publicatie. Deze publicatie heeft bijgevolg niet de ambitie van volledigheid of geldigheid voor uw specifieke situatie. Zij kan bijgevolg nooit beschouwd worden als een juridisch, financieel of ander gespecialiseerd advies. Flanders Investment & Trade (FIT) kan in die zin nooit verantwoordelijk gesteld worden voor gebeurlijke foutieve vermeldingen, weglatingen of onvolledigheden in deze publicatie. FIT kan evenmin verantwoordelijk worden gesteld voor het gebruik of de interpretatie van de informatie in deze publicatie. De verwijzingen in deze publicatie naar bepaalde entiteiten, bedrijven en/of personen houden geen bijzondere aanbevelingen in die voor Flanders Investment & Trade enige verantwoordelijkheid zou kunnen teweegbrengen.

Datum van publicatie: 03/2014

The information in this publication is provided for background information that should enable you to get a picture of the subject treated in this document. It is collected with the greatest care on the bases of all data and documentation available at the moment of publication. Thus this publication was never intended to be the perfect and correct answer to your specific situation. Consequently it can never be considered a legal, financial or other specialized advice. Flanders Investment and Trade (FIT) accepts no liability for any errors, omissions or incompleteness's, and no warranty is given or responsibility accepted as to the standing of any individual, firm, company or other organization mentioned.

Date of publication: 03/2014