

# Brand Portfolio Highlights

## Key Brands

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### Ireland



### Scotland



### C&C Brands



## Premium & Craft

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## Other Owned Brands

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## Wholesale & Distribution



Including distribution rights for certain AB InBev beer brands such as Stella Artois, Beck's, Corona.

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## Wines, spirits, soft drinks

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## Brands

### Legend

- Core brands
- Premium brands
- Other owned brands
- Wholesale & distribution
- Wines, spirits, soft drinks

## Geographical

### Legend

- Ireland
- Scotland
- C&C Brands
- North America
- Export

Read more: Operations Review on page 28

### North America



### Export



### Our Production Facilities

Clonmel Cidery, Ireland



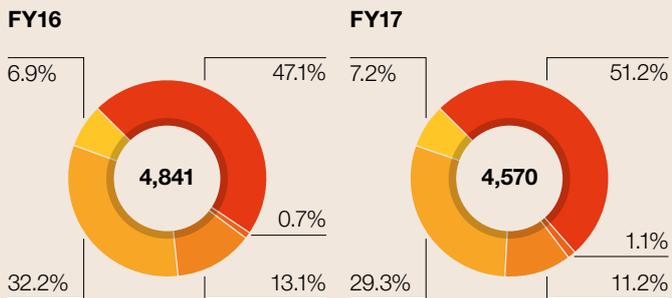
Wellpark Brewery, Scotland



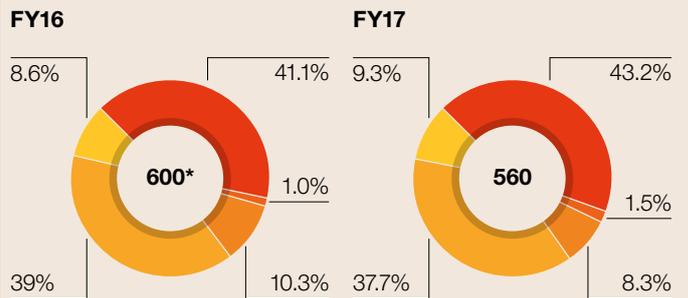
Woodchuck Cidery, USA



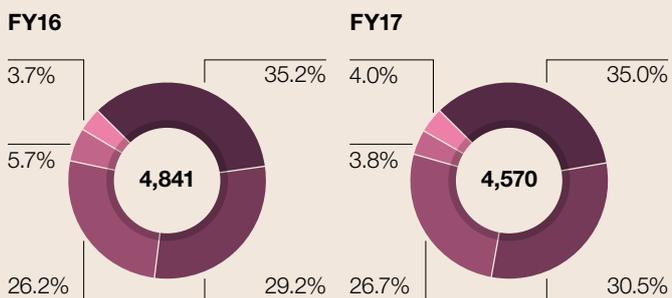
### Volumes (khl)



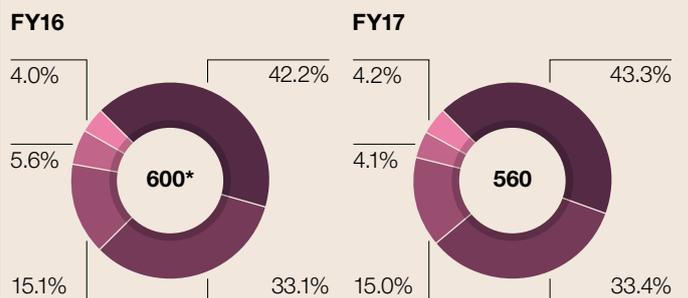
### Net Sales Revenues (€m)



### Volumes (khl)



### Net Sales Revenues (€m)



\* FY16 Net sales revenues adjusted for constant currency and US adjustment following the Pabst transaction.

## Brand Portfolio

### Key Brands

#### Magners



- Transformed cider in the UK in 2005
- No. 2 apple cider brand in GB market
- Now exported to over 50 countries worldwide

**Magners** is a premium, traditional blend of Irish cider with a crisp, refreshing flavour and a natural authentic character. Also in the range is **Magners Dark Fruit** which offers cider drinkers a fruitier alternative to draught apple. The 4% ABV fruit cider has notes of jammy berries and sharp blackcurrants.

#### Tennent's



- No.1 drink by sales in Scotland
- On the bar in 8 out of 10 pubs
- Almost 2 in every 3 pints of lager sold in Scotland
- Highest rate of sale of any beer brand in the UK

**Tennent's Lager** is brewed to the highest standards to create a lager with a crisp taste and refreshingly clean finish. Tennent's has been made with pride in the heart of Glasgow since 1885, but is famous far beyond its home city. Tennent's Lager is Scotland's best-selling lager.

**Tennent's Black T** is a premium lager using the finest natural ingredients, including 100% Scottish barley. It is a golden lager with a well-rounded flavour and a distinct smooth maltiness.

#### Bulmers



- No.1 cider brand in Ireland
- Available in 95% of Irish pubs
- 80 years of heritage and provenance
- No. 3 LAD brand in ROI

**Bulmers Original** is a premium, traditional blend of Irish cider with an authentic clean and refreshing taste.

**Outcider by Bulmers** launched March 2017 is a new sweet cider with plenty of edge and just the right balance of bitter and sweet Irish apples.

#### Core Brands Volumes (khl)



#### Core Brands Net Sales Values (€m)\*



## Brand Portfolio

### Premium and Craft

Our growing portfolio of Premium and Craft Beers and Ciders serves the consumer's increasing demand for diversity, newness and taste.

These are premium products commanding premium prices and support our key brand propositions.

We are targeting that Premium and Craft represent 5% of branded volumes over the medium-term (FY2017: 2%) through a combination of in-house innovation and partnership with International and local/craft brands.

#### In-house Innovation



**Heverlee** is a premium Belgian Beer, which is endorsed by the Abbey of the order of Prémontré, in the town of Heverlee in Leuven.

**Chaplin & Cork's** is an award winning range of exquisite ciders made using pure juice from the finest English cider apples. The range includes Somerset Gold and Somerset Reserve.

#### International Agency



**Menabrea** is from Northern Italy and is matured gently in the perfect temperature of cave cellars for a taste of superior clarity. This pale lager is well balanced between citrus, bitter tones and floral, fruity undertones giving a consistent and refined flavour. It has a complicated malty, hoppy taste with an exceptional head retention due to the quality of our ingredients and maturation process.

**Pabst Blue Ribbon** is brewed in the finest traditions of an American Premium Lager dating back to 1844.

#### Local Craft



**Whitewater Brewery** was established in 1996 on the third generation family farm amidst the spectacular Mourne Mountain range in the north of Ireland. Its range of beers includes Maggie's Leap, Belfast Ale and Belfast Black.

**The Five Lamps** Dublin Brewery was originally set up in early 2012 beside Dublin's iconic Five Lamps. Its first beer, 5 Lamps Dublin Lager, was launched in September 2012. The range now includes Liberties Pale Ale, Monto Red Ale and Blackpitts Stout.

**Drygate** is the UK's first experiential Craft Brewery and is situated beside the Wellpark Brewery in Glasgow. The core Drygate range includes Bearface Lager, Outaspace Apple Ale, Gladeye IPA, Ax Man Rye IPA and the recently launched gluten-free Drygate Pilsner, as well as a regular series of unique and experimental brews.

## Brand Portfolio

### Other Owned Brands

#### Ireland Beer Brands



**Roundstone Irish Ale** is a fine ale in the Irish tradition, brewed from 100% malted barley and a blend of three types of hops to deliver a gentle yet distinctive caramelly maltiness.

**Clonmel 1650**, named after one of the most historic events in the town of Clonmel, is a fine example of a pilsner style lager with a slightly fruity estery nose and a subtle hoppy character.

#### Scottish Beer Brands



**Caledonia Best** is a modern, distinctive ale that is balanced, sweet and smooth, with a malty roast flavour and a pleasant hoppy bitterness.

**Caledonia Premium Bottled** ales are a range of ales designed to meet a variety of drinking occasions. By combining the Highland water of Loch Katrine with the finest Scottish malted barley, hops and yeast we have created a family of beers that are unmistakably Scottish.

#### English Cider Brands



**Blackthorn** is a West Country legend and one of the country's best known and widely drunk ciders due to its secret blend of bittersweet English cider apples. The range includes **Blackthorn Gold**, **Blackthorn Dry** and **Black 'n Black**.

**K cider** is a full strength, premium cider expertly pressed with a unique blend of English cider apples to deliver a full bodied flavour and rich golden colour.

**Ye Olde English** is a traditional medium dry cider made using a unique blend of dessert and cider apples to deliver a deliciously refreshing taste.

**Addlestones** is a naturally cloudy premium cider that is twice fermented but never filtered to deliver its unique, smooth taste.

**Gaymers** is a clean, crisp, easy drinking medium cider made using the finest English apples.

Other English cider brands include **Natch**, **Special VAT** and **Taunton Traditional**.

#### American Cider Brands



**Woodchuck Hard Cider** is a premium hard cider handcrafted in Vermont from the highest quality ingredients while offering an innovative range of ciders. **Gumption** is the newest style in our Woodchuck family and pairs the fresh juice of common eating apples with dry European bittersweet cider apples. The bold packaging and active lifestyle delivers a new energy to the Woodchuck brand family.

**Wyder's Hard Cider** was formulated in 1987 by cider master Ian Wyder and is now available throughout the central and western United States.

## Brand Portfolio Wholesale & Distribution

### Brand-led wholesale in Ireland and Scotland

In common with other brewers, the Group complements its branded business with third-party drinks wholesaling, own-label and agency distribution in its key domestic markets of Ireland and Scotland.

This wholesale and agency activity supports our branded businesses by broadening the portfolio of drinks we can offer to our on and off-trade customers and deepens our level of understanding and engagement with the trade. Wholesale and agency also leverage the Group's existing procurement, sales, marketing and distribution infrastructure to provide incremental revenue and profit through overhead absorption.

Our principal agency business is the AB InBev beer portfolio which we distribute in Ireland and Scotland (excluding Budweiser in the Republic of Ireland). AB InBev's range of World beers includes Becks, Stella Artois, Budweiser, Bud Light and Corona and is highly complementary to our Magners, Bulmers and Tennent's brands and our emerging Premium and Craft portfolio.



## Brand Portfolio Wines, Spirits And Soft Drinks

### Wine & Spirit Brands



The Group's portfolio of wine and spirit brands sold in the on-trade includes the **Oliver & Greg's** and **Moondarra** wine brands, **Odessa Vodka** and **Squires Gin**.

The Group also distributes a number of wine brands in the Republic of Ireland including **Santa Rita** and **Yellow Tail**.

### Soft Drinks



**Tipperary Pure Irish Water** is proudly bottled at source in Tipperary.

**Finches** is a range of premium soft drinks in orange and other flavours produced in Ireland with pure natural spring water.

**JWV+** is made from natural mineral water. It contains a range of health intrinsic and is targeted at consumers looking for tasty refreshing alternatives to the traditional soft drink and bottled water offering.