

FINAL APPROVED

Wholesale News

November 2009 – Alcohol (Beers, wine and spirits)

| BEERS | MAT 52 WEEKS | | % CHANGE |
|-------------------------------|---------------------|---------------------|-----------|
| | TY | LY | |
| STELLA ARTOIS 4x440ml/500ml | | | Down |
| FOSTERS 4X500ML | | | Down |
| FOSTERS LAGER 8x440ml | | | UP |
| STRONGBOW CIDER 8x440ml | | | Down |
| STRONGBOW 2LTR | | | UP |
| CARLSBERG LAGER 8X440ML | | | UP |
| OWN LABEL SUPER LAGER 500ml | | | Down |
| CARLING 4x500ml | | | Down |
| OWN LABEL PREMIUM LAGER 500ml | | | Down |
| OWN LABEL STRONG DRY CIDER 2L | | | UP |
| CATEGORY TOTAL | £279,478,518 | £277,403,375 | 1% |

| WINES | MAT 52 WEEKS | | % CHANGE |
|-----------------------------------|---------------------|---------------------|-----------|
| | TY | LY | |
| BLOSSOM HILL WHITE 75cl | | | UP |
| ECHO FALLS WHITE 75cl | | | UP |
| BLOSSOM HILL RED 75cl | | | Down |
| BLOSSOM HILL WHITE ZINFANDEL 75cl | | | Down |
| ECHO FALLS ROSE 75cl | | | UP |
| LAMBRINI ORIGINAL 1.5ltr | | | UP |
| ECHO FALLS RED 75cl | | | UP |
| GALLO WHITE GRENACHE 75cl | | | UP |
| ECHO FALLS WHITE ZINFANDEL 75cl | | | UP |
| JACOBS CREEK SEMILLON/CHARD 75cl | | | Down |
| CATEGORY TOTAL | £184,403,266 | £173,854,567 | 6% |

| SPIRITS | MAT 52 WEEKS | | % CHANGE |
|-------------------------------|---------------------|---------------------|-----------|
| | TY | LY | |
| SMIRNOFF RED 70cl | | | UP |
| GLENS VODKA 70cl | | | UP |
| GLENS VODKA 35cl | | | UP |
| BELLS WHISKY 70cl | | | UP |
| OWN LABEL VODKA 70CL | | | UP |
| OWN LABEL VODKA 35CL | | | UP |
| THE FAMOUS GROUSE WHISKY 70cl | | | UP |
| SMIRNOFF RED 35CL | | | UP |
| GORDONS GIN 70cl | | | UP |
| JACK DANIELS 70CL | | | UP |
| CATEGORY TOTAL | £201,805,940 | £190,015,601 | 6% |

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Steve Collins, Commercial Director, SalesOut

Whilst the total performance of alcohol continued its positive growth trend (+3.7%) the Beer category continues to be flat, consistent with SalesOut's reports earlier in the year that independent sales have suffered as a consequence of a general decline in consumption and aggressive promotions in the major retailers. Indeed this later phenomenon is further highlighted by the recent strategy at Tesco to reward higher shopping baskets with the opportunity to buy heavily-discounted beer for as little as £5 per case. On a positive note, cider remains in strong growth lead by a significant sales increase for the Strongbow brand.

Wines have also seen something of resurgence with a 6.1% sales increase, lead by strong growth in New World products, and the particularly exceptional performance of Rosé. This growth in wine has increased its share of the total licensed offering to 28% of the independent market.

Spirits showed a growth of 6%, partly fuelled by duty increases, but also a beneficiary of the increased propensity towards stay at home entertainment. White spirits significantly outperformed dark spirits, with Vodka again growing considerably. Smaller pack sizes, such as 35cl, performed extremely well, as consumers continue to watch budgets in the recession.

ENDS