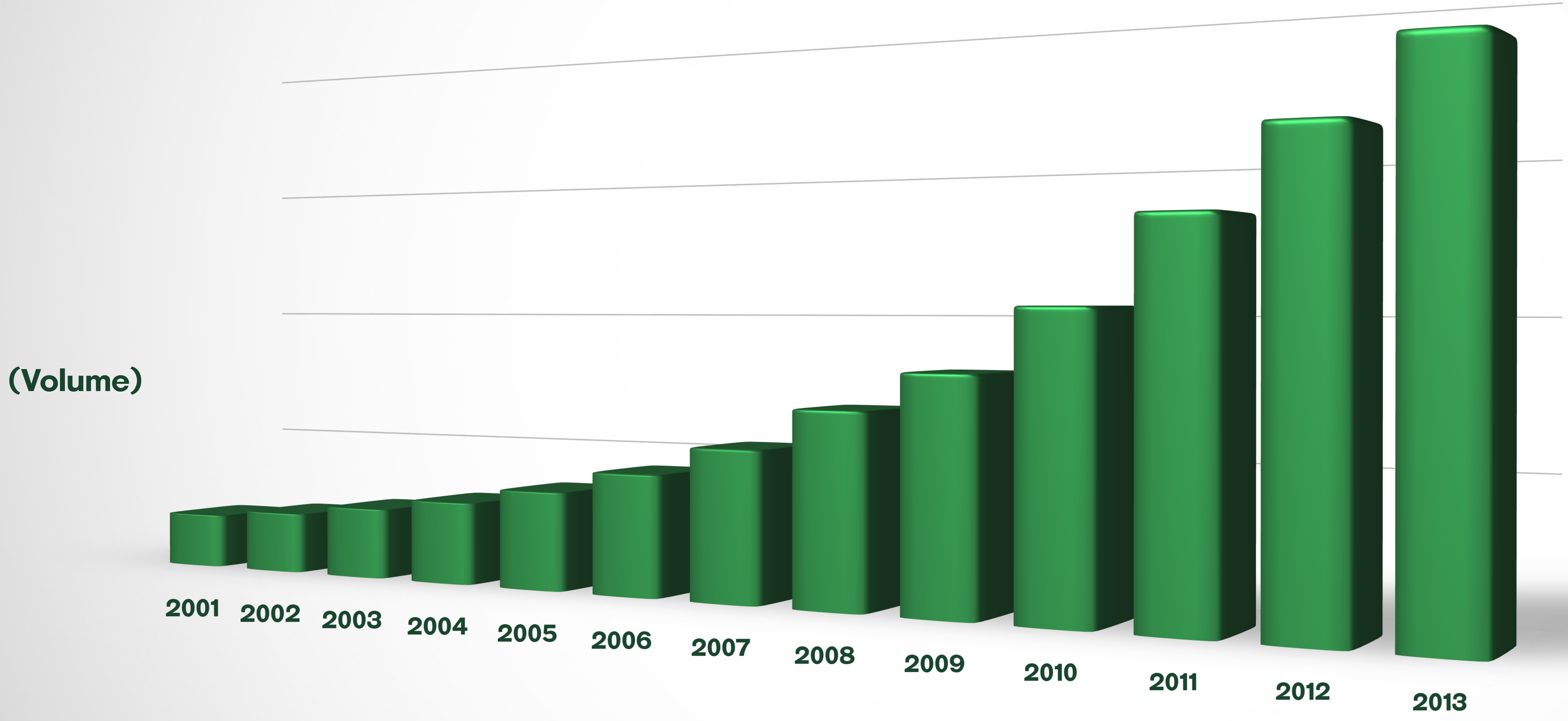
JAMESON®

JOHN JAMESON JJ&S & SON LIMITED

IRISH WHISKEY

WHAT HAS MADE JAMESON A SUCCESS IN THE U.S.

JAMESON U.S. HAS HAD SUSTAINED VOLUME GROWTH PERFORMANCE



21%
3 Year CAGR ('10-'13)

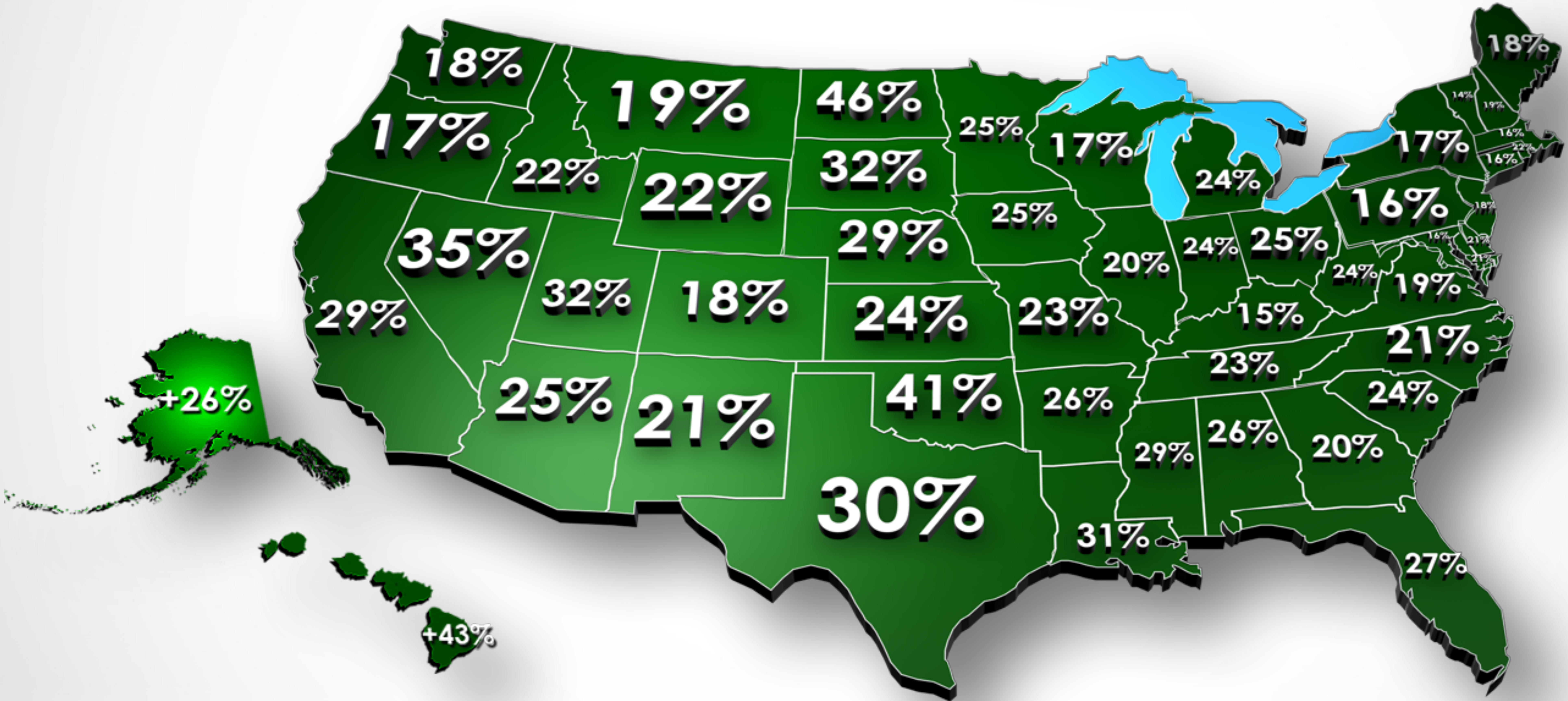
22%
5 Year CAGR ('08-'13)

22%
10 Year CAGR ('03-'13)

Source: Beverage Information Handbook 2007, 2013 and Advance 2014; Calendar Year

JAMESON U.S. IS MOVING TOWARD A NATIONAL BRAND STATUS

50 STATES IN DOUBLE DIGIT GROWTH



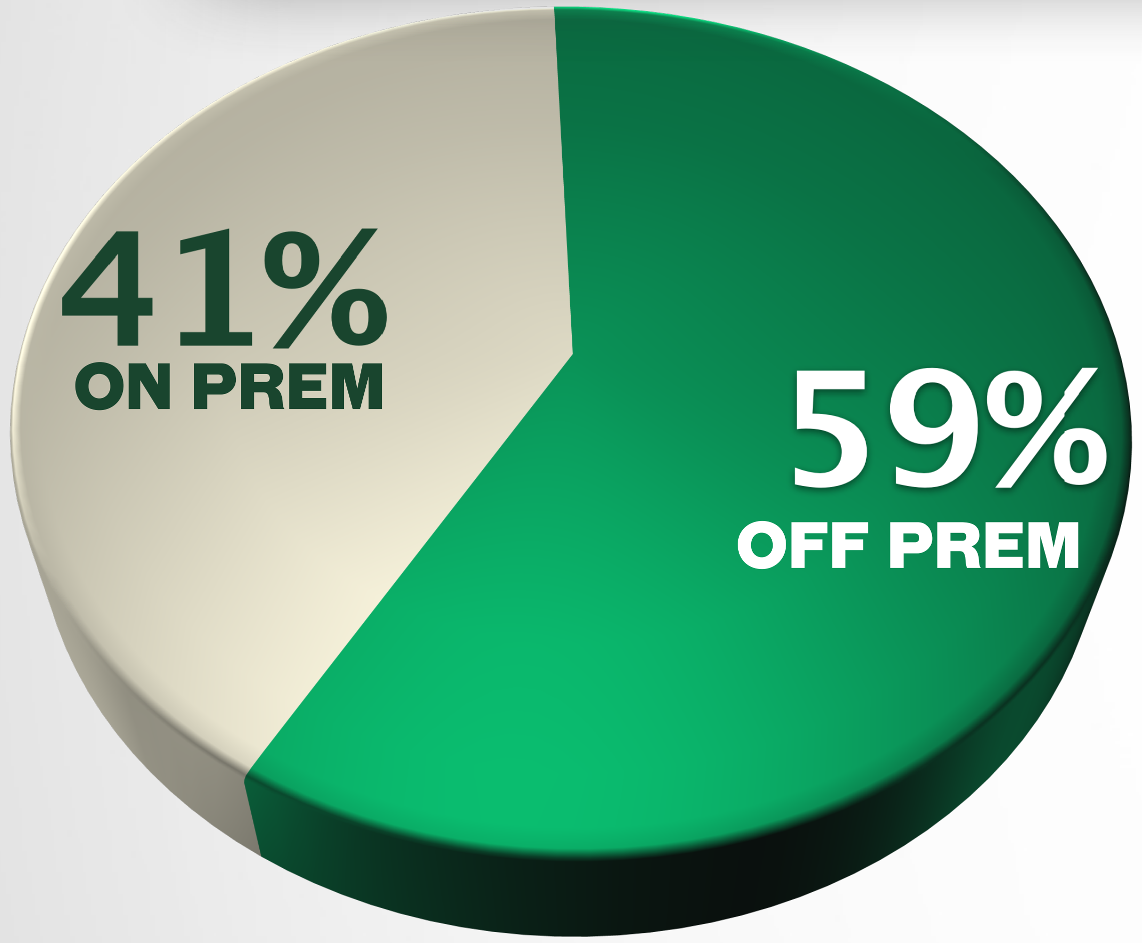
Source: Pernod Ricard Internal Data, Calendar Year 2008-2013, (5 year CAGR)

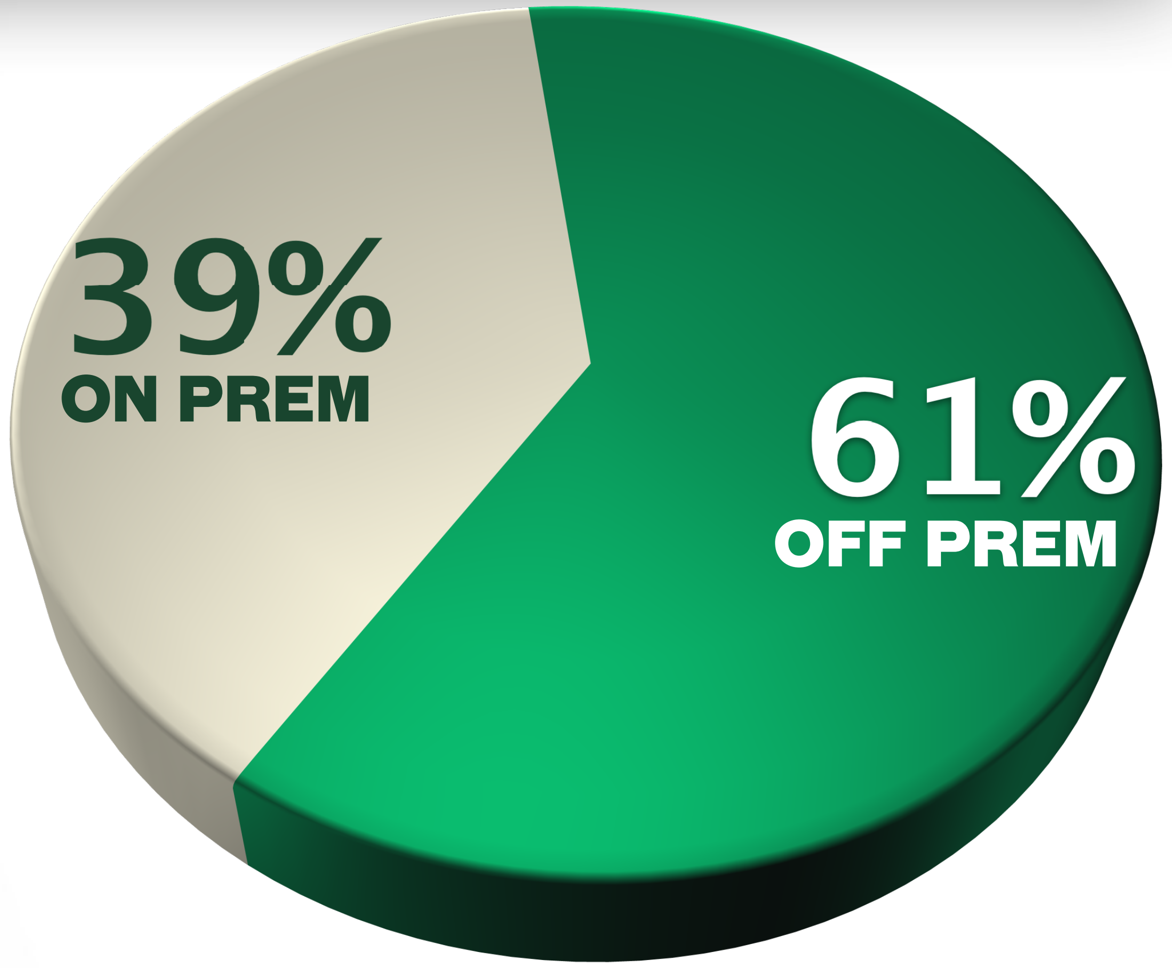
JAMESON BRAND HEALTH CHECK

BRAND HEALTH CHECK

JAMESON CHANNEL SPLIT IS HEALTHY, ESPECIALLY WHEN COMPARED TO COMPETITORS

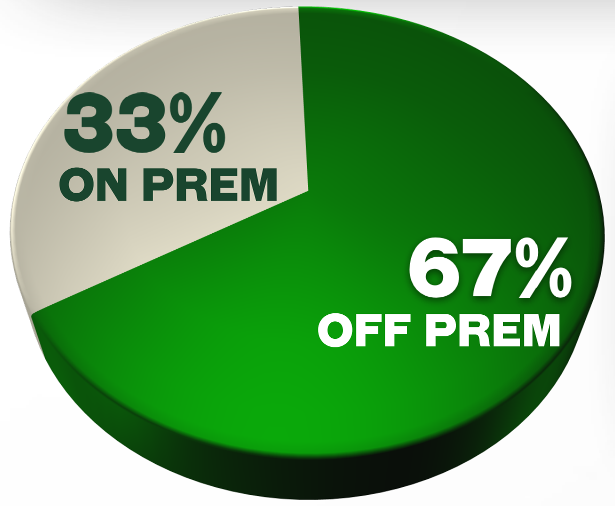
ON/OFF SPLIT 2008 **JAMESON** ON/OFF SPLIT 2013





5 YEAR CAGR
(2008-2013)
ON-PREMISE: +21%
OFF PREMISE: +23%

ON/OFF SPLIT 2008 **MAJOR COMPETITOR** ON/OFF SPLIT 2013



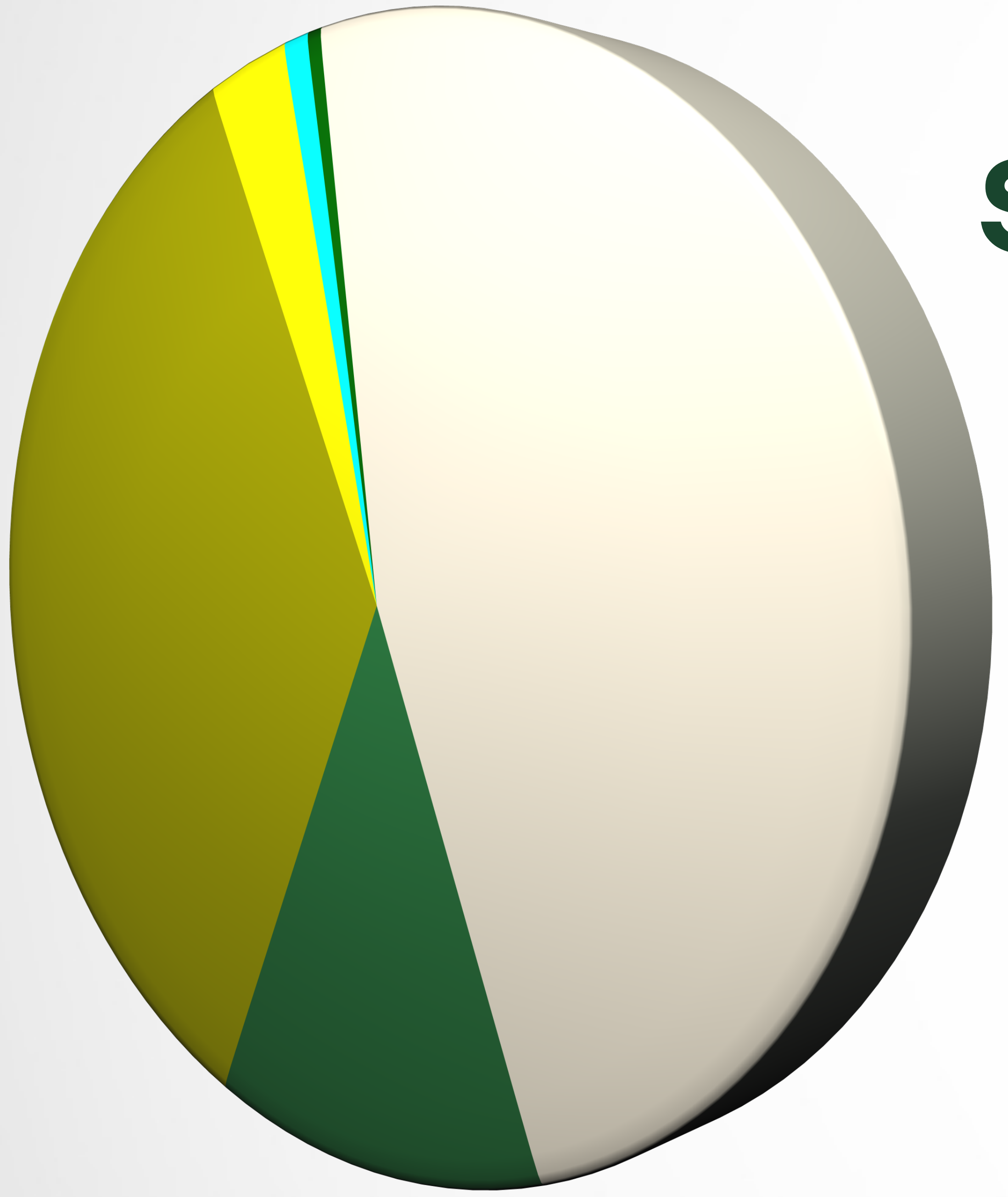
5 YEAR CAGR
(2008-2013)
ON-PREMISE: -1%
OFF PREMISE: +2%

Source: Pernod Ricard Internal Data (RAD), Calendar Year 2008-2013. NABCA Retail Data Calendar 2013 and Calendar 2008; IA, ME, WV, OR, MT Excluded for Off-Trade and On-Trade values because premise sales are not identified by NABCA in these states; MC and WA excluded due to changes in data history

BRAND HEALTH CHECK

JAMESON 1L CONTINUES TO COMPRISE THE MAJORITY OF THE SKU MIX, SHOWCASING THE STRENGTH IN THE ON-PREMISE

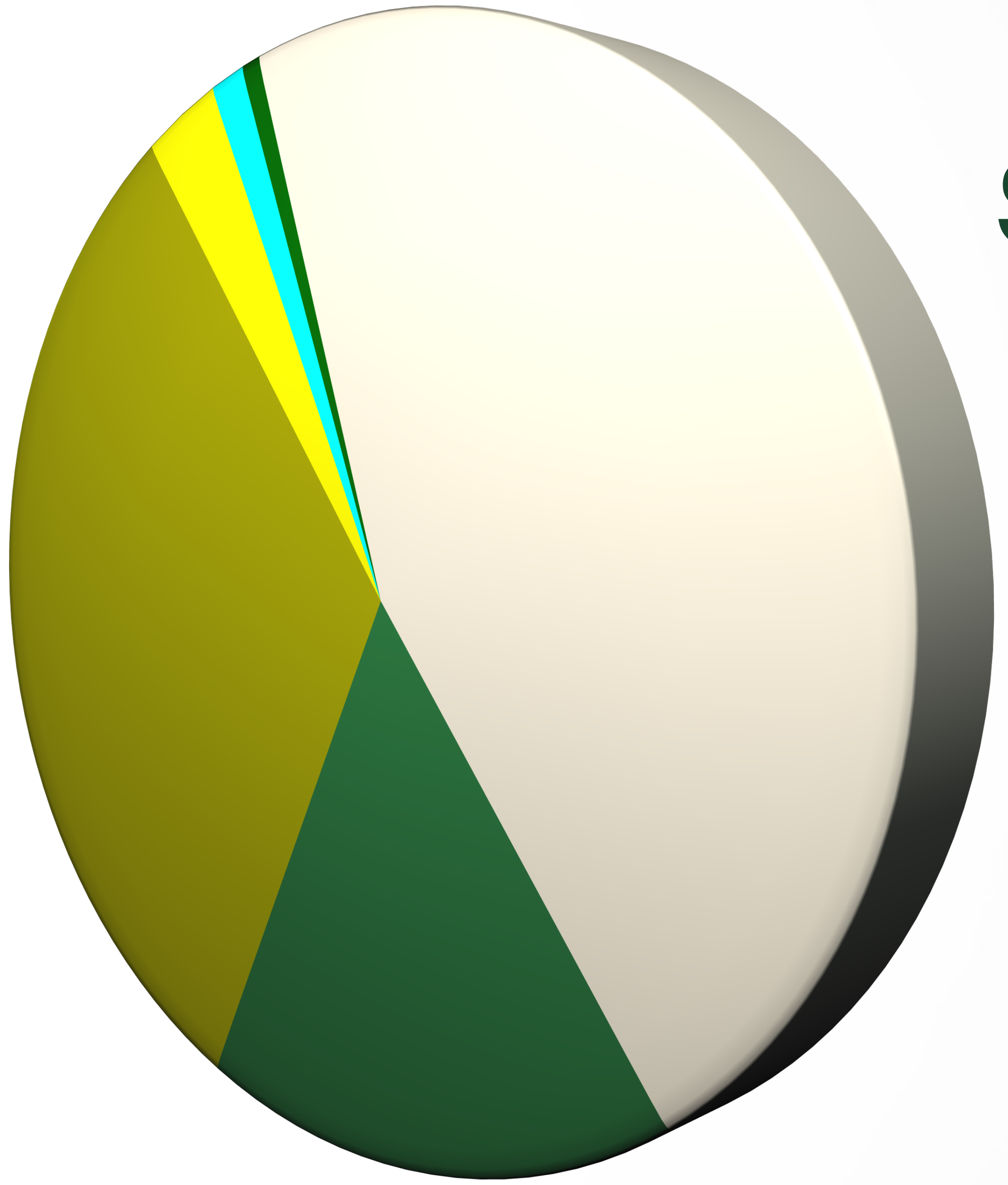
SKU MIX



SKU MIX 2008

1.75L	12%
1L	46%
750ML	37%
375ML	3%
200ML	.9%
50ML	.5%

US VOLUMES 2008
0.7M 9L CASES



SKU MIX 2013

1.75L	17%
1L	45%
750ML	34%
375ML	3%
200ML	1%
50ML	.7%

US VOLUMES 2013
1.9M 9L CASES

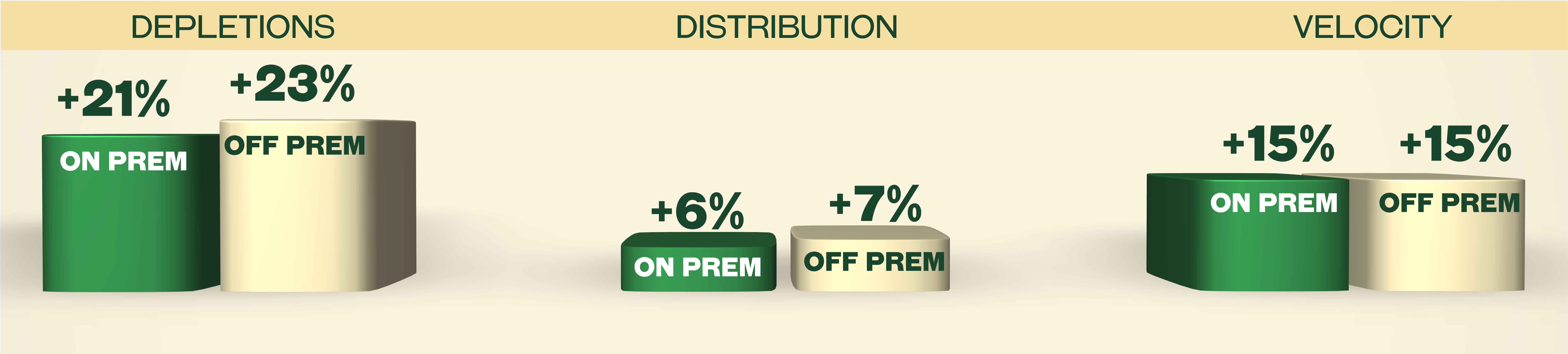
Source: Pernod Ricard Internal Data, Calendar Year 2008, 2013

DEPLETIONS, DISTRIBUTION AND VELOCITY

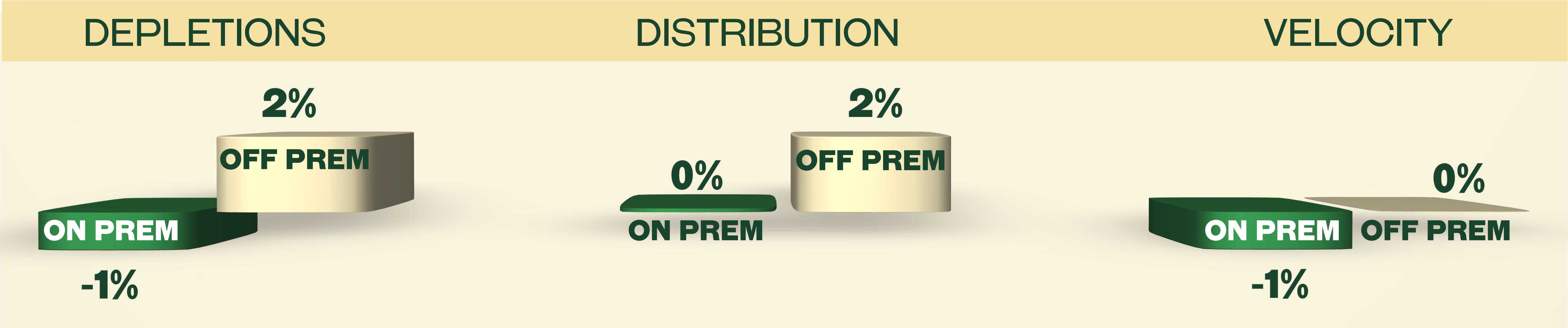
BRAND HEALTH CHECK

KEY METRICS ARE GROWING AND OUTPERFORMING COMPETITION

JAMESON
(CAGR 2008-2013)



MAJOR COMPETITOR
(CAGR 2008-2013)



Jameson Source: Pernod Ricard Internal Data, Calendar Year 2008-2013   Competitor Source: NABCA Retail Data Calendar 2013 and Calendar 2008; IA, ME, WV, OR, MT Excluded for Off-Trade and On-Trade values because premise sales are not identified by NABCA in these states; MC and WA excluded due to changes in data history

BRAND HEALTH CHECK

COMPETITIVE PERFORMANCE

NIELSEN TRENDS 52 WEEKS ENDING 1/4/14

	% Chg. 9L Volume	% Chg. Value
JAMESON	14.6%	17.9%
JACK DANIEL'S BLACK LABEL	1.0%	4.2%
CROWN ROYAL	3.8%	4.5%
MAKER'S MARK	3.2%	8.2%
BUSHMILLS	6.2%	6.9%
TULLAMORE DEW	36.6%	40.0%
TOTAL COMP SET	4.4%	7.3%

Source: Nielsen XAOC+Liq-Wash Food, 52 Weeks Ending 01/04/14

NABCA TRENDS R12 CALENDAR YEAR 2013

	% Chg. 9L Volume	% Chg. Value
JAMESON	13.7%	16.7%
JACK DANIEL'S BLACK LABEL	-0.4%	3.6%
CROWN ROYAL	0.1%	1.3%
MAKER'S MARK	4.1%	10.1%
BUSHMILLS	3.5%	5.7%
TULLAMORE DEW	11.2%	17.2%
TOTAL COMP SET	2.2%	5.5%

Source: NABCA Calendar Year, 9L CS; 2013 (Shelf dollar volume excludes MS, IA, WV, WY as these states do not reflect value)

Note: Above data reflects Regular/Base brand only" (this note is applicable to both charts)

BARTENDER ADVOCACY IS STILL STRONG

39% (+6% VS PREVIOUS YEAR) OF CONSUMERS STARTED DRINKING JAMESON DUE TO "A BARTENDER RECOMMENDATION"*

SHOT BRANDS BARTENDERS PERSONALLY CONSUME**

2010	2013
1. Jägermeister	1. Jameson
2. Patron	2. Tequila (unspecified)
3. Tequila (unspecified)	3. Fireball
4. Jameson	4. Jägermeister
5. Lemon Drop	5. Vodka (unspecified)

POPULAR STRAIGHT SHOT BRANDS**

2010	2013
1. Patron	1. Patron
2. Jägermeister	2. Jameson
3. Jack Daniel's	3. Jägermeister
4. Jose Cuervo	4. Fireball
5. Jameson	5. Jack Daniel's

Source: *Brand Equity Monitor 2013; **2013 MSS Study

KEY U.S. SUCCESS FACTORS

THE PEOPLE

ADVOCACY

PRUSA

THE STRATEGY

ACTIVATION

$$$

MULTICULTURAL

ADVOCACY

KEY U.S. SUCCESS FACTORS

JAMESON STAYS RELEVANT TO ITS KEY INFLUENCERS

ORIGINAL BARTENDERS

DUDES

KEY U.S. SUCCESS FACTORS

JAMESON SPEAKS TO 2 PRIMARY CONSUMER TARGETS

ADVOCATES

FURTHER DEEPEN CONNECTION
& DRIVE FREQUENCY

RECRUITS

ACCELERATE THE CONNECTION
& DRIVE TRIAL

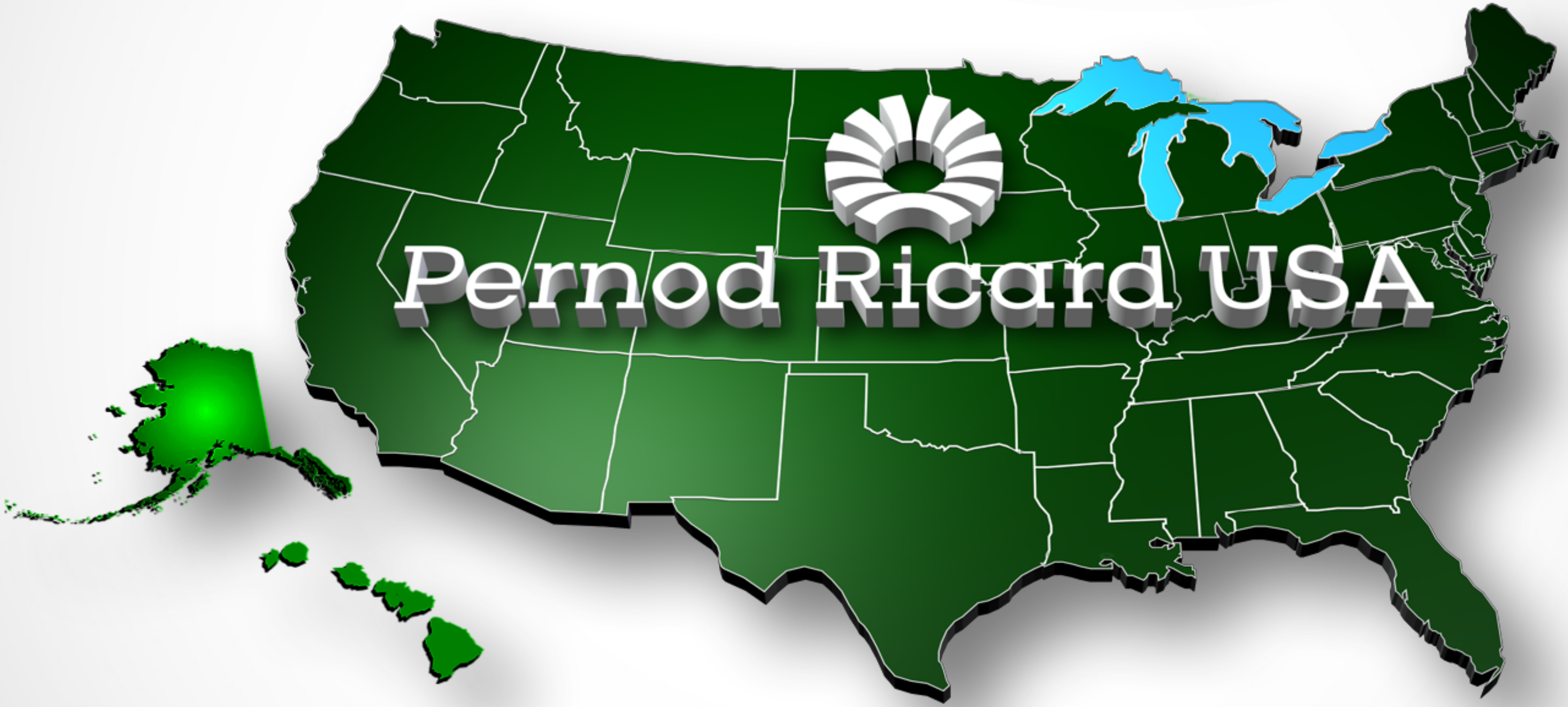
KEY U.S. SUCCESS FACTORS

BARTENDERS CONTINUE TO REMAIN AT THE HEART OF THIS BRAND

KEY U.S. SUCCESS FACTORS

THE GROWTH OF PRUSA HAS BEEN A KEY FACTOR IN THE BRAND SUCCESS IN THE U.S.

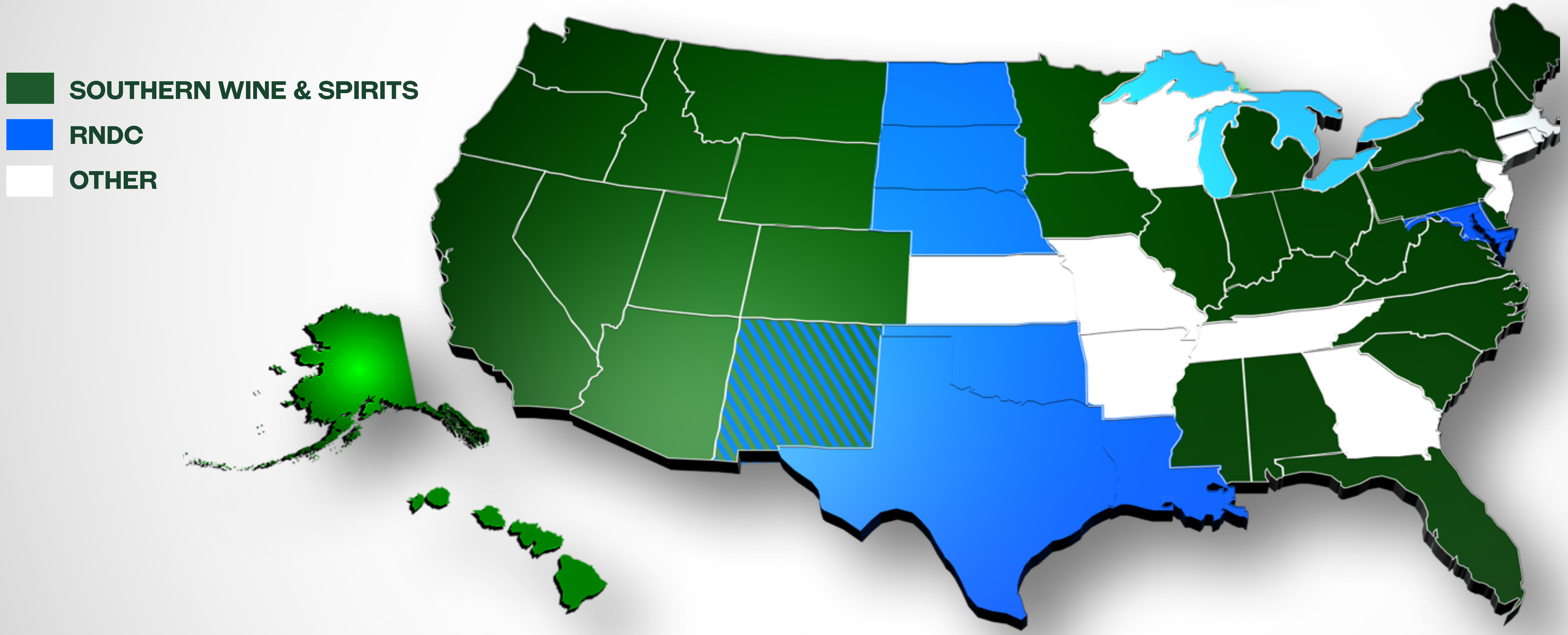
PRUSA



KEY U.S. SUCCESS FACTORS

A POWERFUL ROUTE TO CONSUMERS ALSO DRIVES THE BRAND'S SUCCESS

PRUSA



* NEW DISTRIBUTOR ALIGNMENT EFFECTIVE JULY 1, 2014

KEY U.S. SUCCESS FACTORS

SUMMARY

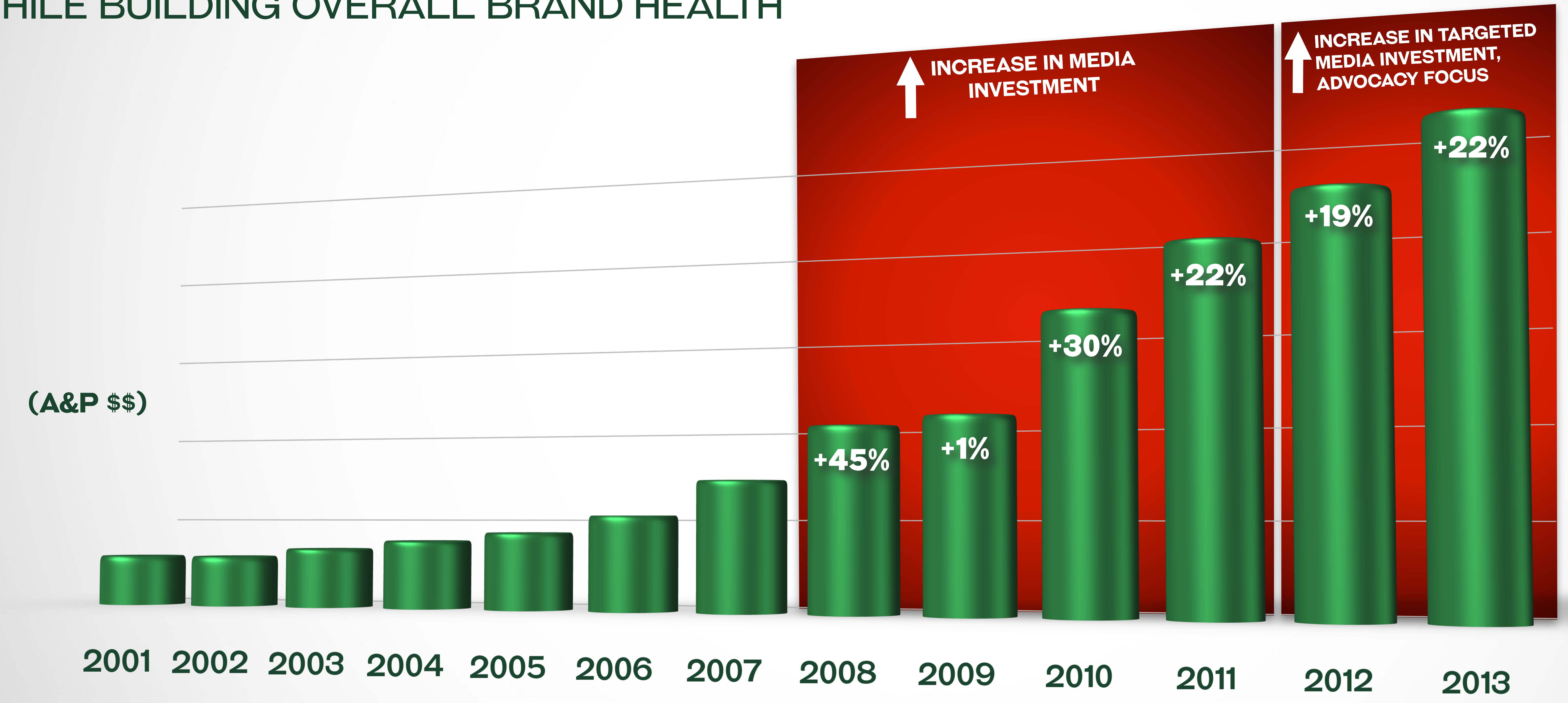
- ON PREMISE AND OFF PREMISE SCALE WITH NATIONAL ACCOUNT FOCUS
- EVOLVING DISTRIBUTOR NETWORK WITH AN INCREASE IN DEDICATED RESOURCES IN OPEN STATES
- ENGAGING BRAND PROGRAMMING
- CLEAR KPIS AND INTEGRATED GPS TARGETED SALES PLATFORM (IPAD)
- INCREDIBLE BRAND ADVOCACY WITHIN PRUSA AND THE DISTRIBUTOR

KEY U.S. SUCCESS FACTORS

THE STRATEGY

KEY U.S. SUCCESS FACTORS

A&P INVESTMENT CONTINUES TO GROW AND BECOME MORE EFFICIENT, WHILE BUILDING OVERALL BRAND HEALTH



Source: Pernod Ricard Internal Data, based on Fiscal Year

KEY U.S. SUCCESS FACTORS

THE JAMESON ACTIVATION PLAN

JAMESON®

JOHN JAMESON & SON LIMITED JJ&S

IRISH WHISKEY

ACTIVATION

BRAND AMBASSADORS/ COMMUNITY MANAGERS

ACTIVATION

BEST FESTS

ACTIVATION

BLOCK PARTIES

COMMUNICATIONS

ACTIVATION

ACTIVATION

BARTENDER BALL

LOCALS

KEY U.S. SUCCESS FACTORS

JAMESON BLACK BARREL IS A PRIMARY FOCUS

KEY U.S. SUCCESS FACTORS

VALUE CONTINUES TO GROW AHEAD OF VOLUME

NET SALES

DEPLETIONS (9L CASES)

Source: Pernod Ricard Internal Data, Fiscal 2008-2013, 5 Year CAGR

KEY U.S. SUCCESS FACTORS

WHISKEY IS A GROWING OPPORTUNITY WITH U.S. HISPANICS AND AFRICAN AMERICANS

- WHISKEY IS GENERATING THE GREATEST GROWTH IN VOLUME AND VALUE IN THE BOOMING HISPANIC MARKET
  - IRISH IS THE 2ND FASTEST GROWING WHISKEY IN VALUE AMONG HISPANICS
  - HISPANIC BUYING POWER IS SURGING, AND THEIR MEDIAN AGE IS 27 (VS. 37 FOR U.S. POPULATION)
- THE JAMESON APPROACH IS EXTREMELY RELEVANT TO THE HISPANIC CONSUMER
- WHISKEY IS THE 2ND LARGEST SPIRITS CATEGORY AMONG AFRICAN AMERICANS, AND IRISH IS GAINING GROUND

Source: Nielsen; TOTAL US – FOOD – TTL/HISPANIC/AF-AM; $ Vol Abs Change vs YA, 52 Weeks ended 1/04/2014; Total US – Food – Hispanic

OPPORTUNITIES THAT WILL CONTINUE TO BUILD JAMESON IN THE FUTURE

- CONTINUED ADVOCACY WITH KEY INFLUENCERS
- STRONG INNOVATION PIPELINE
- RECRUITMENT OF NEW CONSUMERS/ MULTICULTURAL OPPORTUNITY
- GROWTH OF VALUE OVER VOLUME

PRUSA IS COMMITTED TO ENSURING JAMESON HAS:

1. The highest levels of **bartender and consumer advocacy** of any whiskey brand
2. The status as one of the **most called on and recommended brands** in the on-premise
3. A **multi-tiered portfolio** (premiumization focus)
4. Leadership of the Irish Whiskey **category**

…AND ABOVE ALL…RECOGNITION AS A **"PASSION"** BRAND IN THE USA!