



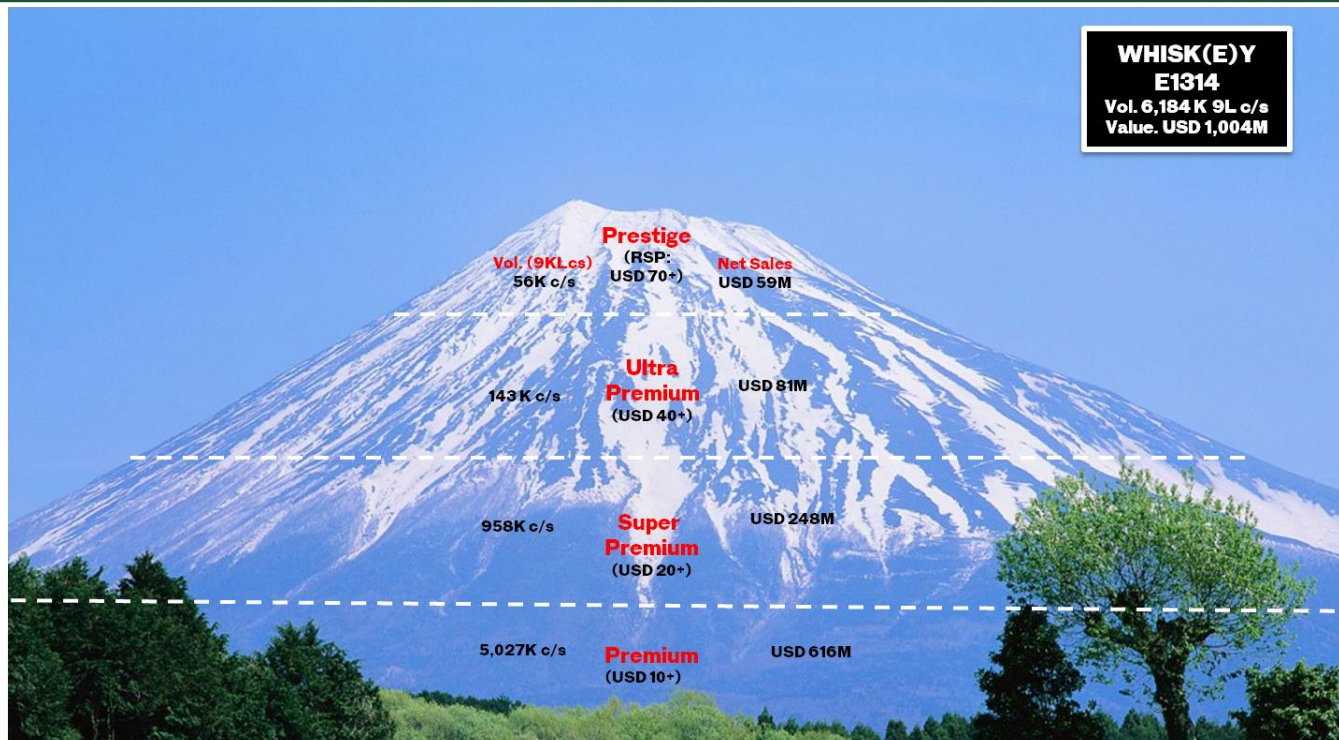
Capital Market Day

Jameson Strategy and Ambitions in Japan

Cork, 4th June 2014

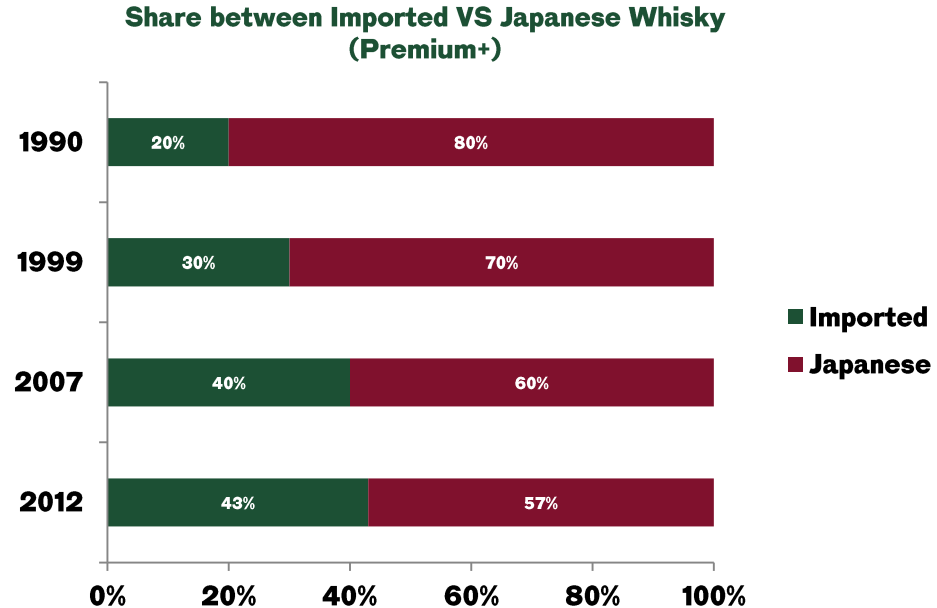


Japan is the #3 worldwide Premium+ whisk(e)y market

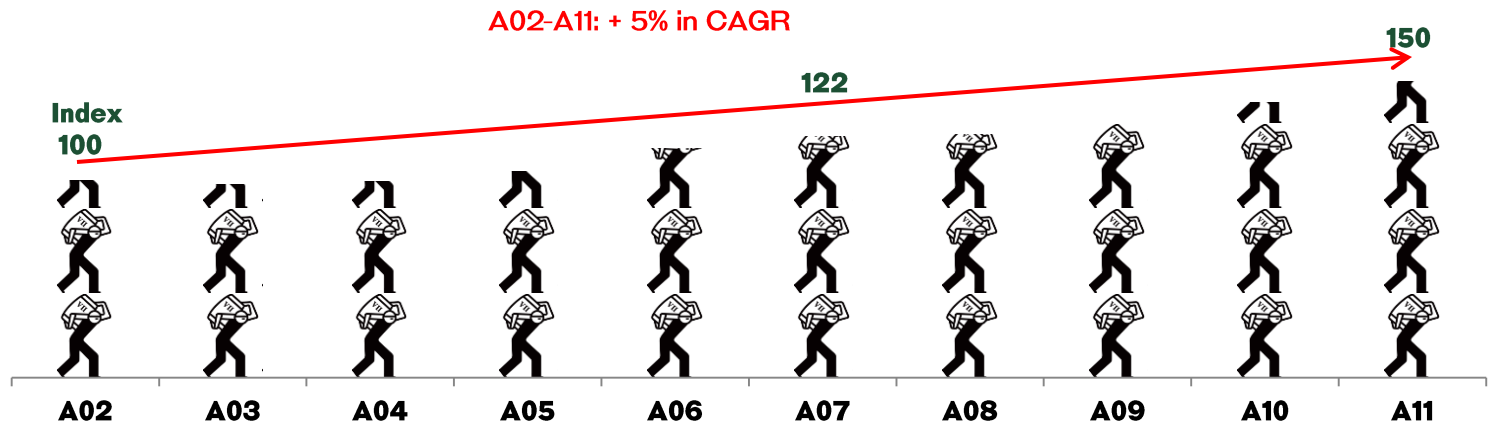


Source: PRJ Marketing Estimate for Volume & NS

. . . dominated by Japanese whisky, yet share of imported whisk(e)y is increasing



Jameson: Steady single-digit growth until 2010



2011 onwards: Step change for aggressive growth strategy



Jameson: The Third Way in Whisk(e)y



Strong Post-Consumerism Megatrend

Less conspicuous consumption

Less formalism

Less materialistic orientated

More balance between business life and private life



Are there any DUDEs in Japan? Triple Yes!



- He doesn't follow conventions at work or choices of life, and avoids the standard way
- He has his own style and doesn't follow trends, he creates trends
- He has a passion to create art or to have ownership of his business and life
- He appreciates subculture, craftsmanship and authenticity, which is reflected in his choice of brands



Where can we find DUDES in Tokyo? - City Culture Mapping

Sub-Cultural



Harajuku



Central Shibuya

Authentic/
Mainstream

DUDE AREAS



Ginza



Shinjuku

Age

Source: 1. Hato Mark 2011, 2. Clasa 2012, 3. Tokyobookmark 2012

Jameson activity scope in Japan

Bonding with DUDEs



MOT development



Sine Metu Bartender Club



Bartenders Ball

Brand owned territory development



Ginger & Lime



March Focus



Film Screening Events

Trade Activity



BS & Off-trade seminars + incentive trip



Consumer sampling



MOT Shot promotion



GWP Promotion



Reserve Strategy

Step change in performance

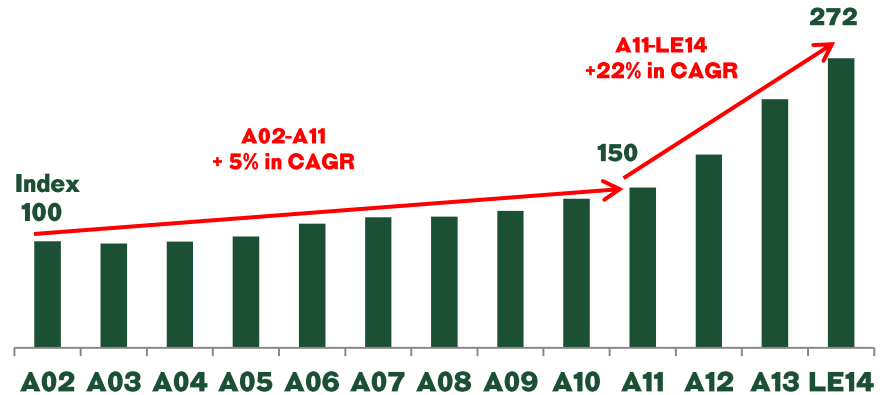
► Volume Performance:

- **+22% CAGR in LE1314 vs. A1011**

► Distribution sharply increased in 1314:

- **+27% vs. PY in Off-trade**
- **+14% vs. PY in On-trade**

Jameson Volume Total



Source: Latest Estimate by PRJ for FY13/14 / PRJ Internal Data for distribution (YTD Feb)



What are the ambitions for Jameson?

- ▶ **Strong double digit growth both in volume and in value**
- ▶ **Fastest growing distribution nationwide as imported premium whisk(e)y in on & off trade channels**
- ▶ **Geographical expansion: from 6 to 20 DUDE areas in Tokyo, seeding in DUDE areas in Osaka, Kyoto, Nagoya**
- ▶ **Become the most preferred brand among DUDE bartenders**

* Brand awareness & advocacy in DUDE towns (bartenders & consumers) to be checked by Bi-annual Questionnaire with Local DUDE Media





有難うございました!

