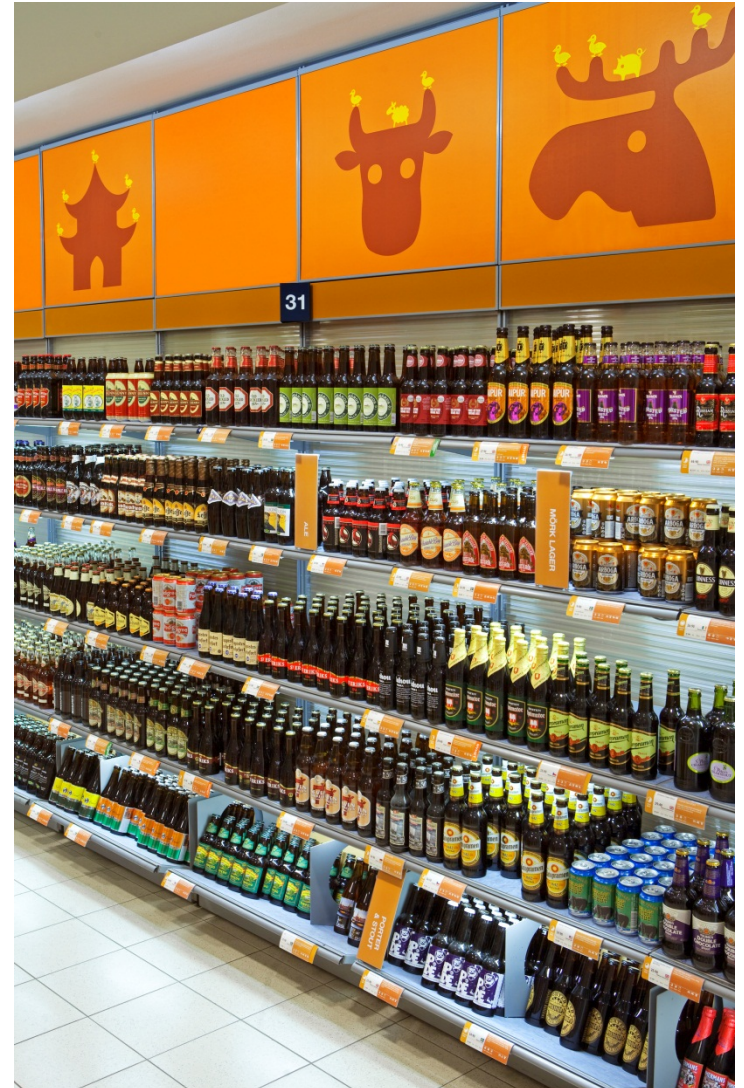


Selling Your Craft Beers in Sweden Through the Systembolaget

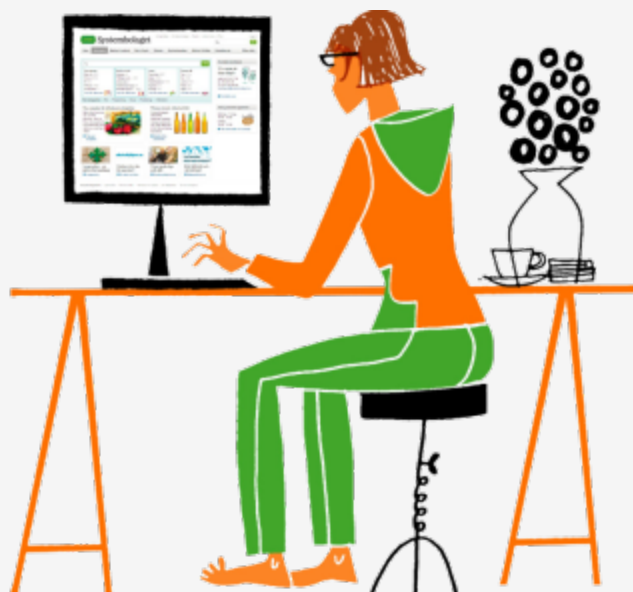


Agenda

- Who we are
- How we work
- How to sell to the Systembolaget
- Sales development



About Systembolaget



Systembolaget exists for one reason:

There will be fewer alcohol-related problems if alcohol is sold without aiming to generate a profit

Because...

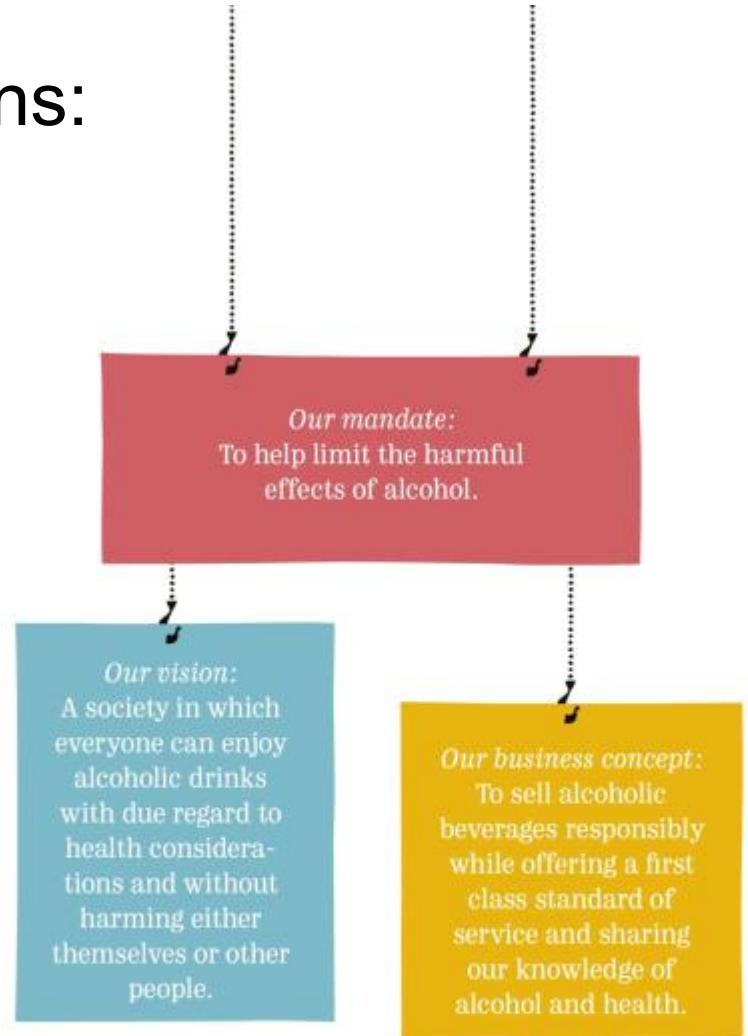
... not aiming to generate a profit means there is no reason to sell to people under the age of 20



... not aiming to generate a profit means there is no reason to try to encourage customers to buy more than they intended to

Systembolaget's mandate means:

- Limited access via
 - Number of stores
 - Opening hours
 - Sales regulations
- No maximisation of profits or additional sales
- Brand neutrality
- Responsible approach and good customer service



Our Product Range

- Over 14,400 items
 - Approx. 2,400 in the fixed range
 - Approx. 12,000 or so in the temporary range

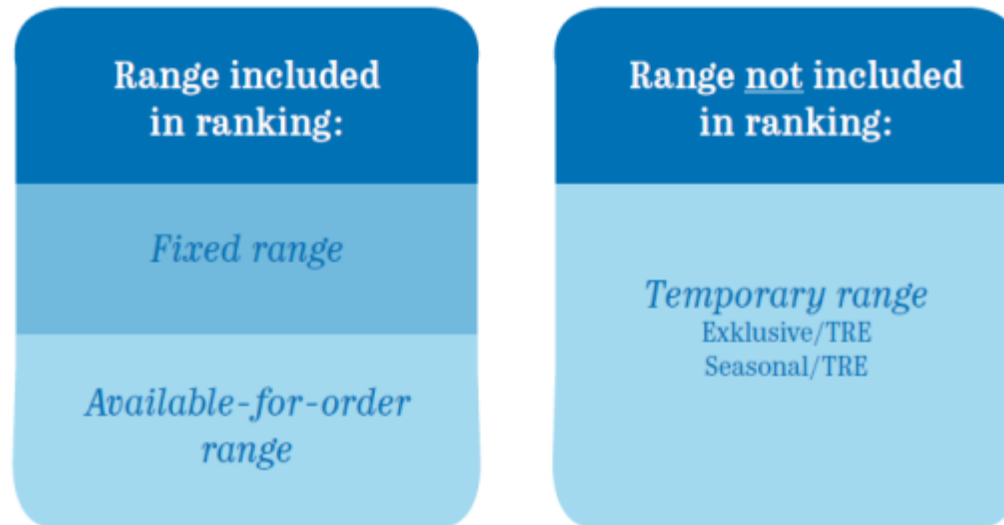




Systembolaget

Systembolaget's product range undergoes continuous evaluation and it is the best-selling items that stay on the shelves in our stores.

The Fixed range and the Available for order range are evaluated and ranked continuously, with the best-selling items included in our Fixed range and achieving increased store coverage. The Temporary range (TRE and TRS) cannot qualify for the Fixed range.



Beer, cider and mixed drinks

Beer

Pale lager

6101 Lager can <= 355ml (..-5.9%)

6102 Lager can >355ml (..-5.9%)

6103 Lager extra strong can (6.0%-..)

6201 Lager bottle <=355 ml <SEK 17,
>355 ml <SEK 20 (..-5.9%)

6202 Lager bottle <=355 ml <SEK 17,
>355 ml <SEK 20 (..-5.9)

6203 Lager extra strong bottle (6.0%-..)

Wheat beer

6307 Wheat beer bottle/can

Ale

6303 Ale can (..-5.9%)

6301 Ale bottle (..-5.9%)

6305 Ale extra strong (6.0%-..)

Dark lager

6104 Dark lager can

6204 Dark lager bottle

Porter/stout

6304 Porter/stout can (..-5.9%)

6302 Porter/stout bottle (..-5.9)

6306 Porter/stout extra strong (6.0%-..)

Other beer types

6308 Other beer

Traditional beer

6501 Easter

6503 Oktoberfest

6504 Christmas

6502 Summer

Beer in other packaging

6401 Other lager

6402 Other ale/porter/stout

Cider & mixed drinks

Dry & medium-dry

6601 Dry/medium-dry cider bottle

6602 Dry/medium-dry cider can

Sweet

6603 Medium-sweet/sweet cider bottle

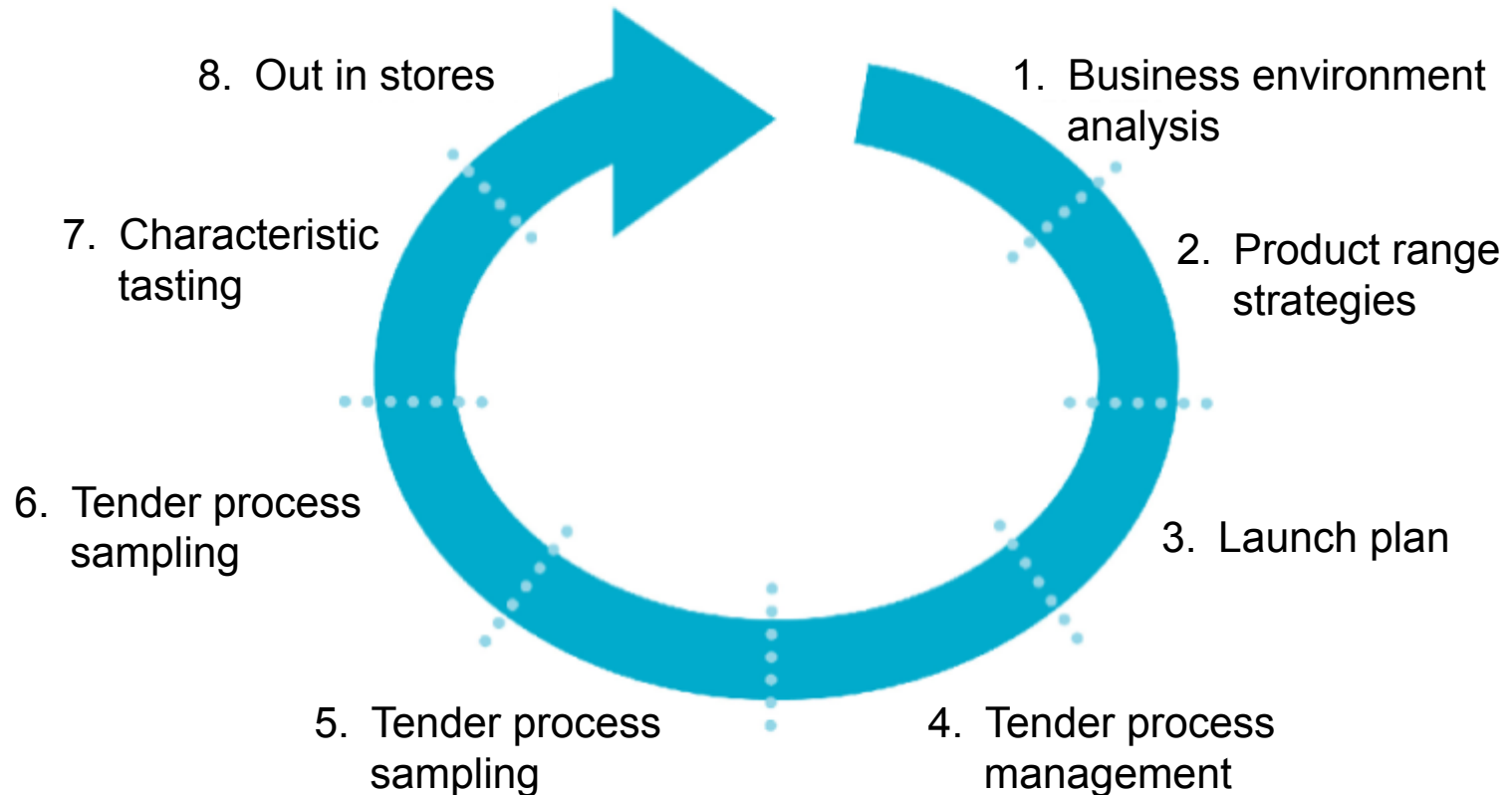
6604 Medium-sweet/sweet cider can

6606 Mixed drinks

Cider in other packaging

6605 Cider other packaging

The purchasing process



Launch plan

2014 Launch plan

A promise

We make a promise to our customers: *you should always feel welcome, you should always feel that you can learn something from us, and you should always be able to rely on us to sell responsibly.*

This customer promise is at the heart of our day-to-day activities. It is as important to the member of staff, who interacts with the customers on a daily basis, as it is for all of us who help and support them.

The import is self-evident for those of us who work with the product range. We must offer an assortment of products that provides a mixture of recognition and inspiration and which appeals to all of our customers. We must offer both the breadth and depth that encourages people to learn more and gives them the means of doing so.

It means that our far-reaching commitment - to our customers' health, to our environment, and to everyone who works in the drinks industry - must also be apparent.

It would be impossible for us to keep our promise to our customers without you, our suppliers, and your expertise when it comes to products, trends, harvest yields, and the latest innovations. It is only by working hand in hand with our suppliers that we can create a product range that keeps our customer promise alive.

Contents

2014 Launch plan - an introduction	2
The world in which we operate	3
Monitoring	8
Structuring the product range	10
Quality assurance	13
Systembolaget promotes sustainability	15
New product range model	17
Alcohol sales in Sweden - a background to Systembolaget's 2014 launches lanseringar 2014	24
Contact information	35

Our mandate:
To help limit the harmful effects of alcohol.

Our vision:
A society in which alcoholic drinks can be enjoyed with due regard for health considerations so that no one is harmed.

Our business concept:
To sell alcoholic beverages responsibly while offering a first class standard of service and sharing our knowledge of alcohol and health.

Request for tender

PUBLICERINGSDATUM: 2012-03-14

Offertförfrågan för vintern 2012

Innehåller alla offertförfrågningar för vinterlanseringar 2012. Notera att det finns olika tidpunkter för offertstopp.

För offertvinnare vin är det inte längre nödvändigt att skicka in produktcertifikat. Detta behövs bara för öl, cider och sprit. Lägg märke till att för produkter med pant så anges försäljningspriset exklusive pant.

Innehåll
Se sidan 4.

LP-användare
Leverantörer anslutas till Leverantörsportalen offererar via denna och bifogar eventuella bilder och dokument den vägen. Offertter och bifogade dokument kan skickas in via portalen fram till midnatt (klockan 23.59) på offertstoppdagen.

För Leverantörer som ännu inte anslutit sig till Leverantörsportalen (LP)
Då bild på flaska och/eller etikett efterfrågas i referensen ska pappersoffert med presentation skickas till Systembolaget med post (ej e-post) eller lämnas i receptionen.

Bild
Vänligen observera att då bild på flaska och/eller etikett efterfrågas i referensen ska offert med presentation skickas till Systembolaget med post (ej e-post) eller lämnas i receptionen.

Tillfälligt sortiment
För artiklar i tillfälligt sortiment kan kompletteringsköp samt ytterligare produkter köpas in i undantagsfall.

Ansökan till konsumentpanelen
För dubbel- och trippellanseringar gäller att ni får ansöka till Konsumentpanelen för varje enskild produkt

(storlek). Det innebär också att ni betalar en avgift per ansökan och att vi begär in varuprover för varje enskild produkt. Om det blir ett inköp så gäller det bara för den enskilda produkten.

Offertprover
Produkterna köps in på sin sensoriska kvalitet. Offertprov, lanseringsprov och produkt som levereras till butik måste därför överensstämma sensoriskt. Se avsnittet om kvalitetssäkring sida 2.

Offertproverna ska:

- vara fysiskt, kemiskt och biologiskt stabila.
- behandlas på samma sätt som man avser att behandla slutprodukten. Till exempel om slutprodukten ska filtreras måste offertprovet vara filtrerat.
- blandas i samma proportioner och av samma komponenter/ingredienser som slutprodukten.

De priser som efterfrågas i offertförfrågan är uttryckt till kund. I offert skall dock Systembolagets inköpspris anges.

Om du ännu inte är ansluten till Leverantörsportalen använder du Systembolagets offertblankett (eller av er framställd kopia). Offert som skickas i pappersformat ska vara oss tillhanda före 17.00 på angiven offertstoppdag.

Faxa din offert till: 08-678 29 31

Ansvaret utgörs av: Sara Norell • Redaktör: Elisabet Floberg
Telefon: 08-502 323 53 • Fax: 08-502 325 31
E-post: leveransen@systembolaget.se
Adress: Systembolaget, 103 84 Stockholm www.systembolaget.se



148022 USA, amber ale, burk (C)

Sortiment:	Fast sortiment
Distribution:	Standard ABCD, Premium ABCDE (MT 100% AB 421)
Lanseringsdag:	2014-12-01
Senaste svarsdatum:	2014-04-10

Bakgrund: Addera djup i segmentet.
 Provingen kommer att delas in i flighter baserade på pris enligt följande:
 18,90 kr, 19,00-20,90 kr, 21,00-22,90 kr, 23,00-24,90 kr.

Stil- och smakprofil: Vi söker en kopparfärgad, smakrik och nyanserad amber ale. Ölet ska ha en tydlig aromatisk humlekaraktär, knäckig maltighet samt balanserad beska.

Krav på produkten:

Pris till kund:	18,90-24,90 kr
Alkoholhalt enligt etikett (volym %):	Max 5,9%
Ursprungsland:	USA
Varukategori enligt EU:	Starköl
Varuslag:	Specialöl
Volym:	Max 355 ml
Förpackning:	Burk
Tillgänglig volym (liter):	50 000

148023 USA, barley wine (C)

Sortiment:	Fast sortiment
Distribution:	Standard CD, Premium BCDE (MT 86% AB 214)
Lanseringsdag:	2014-12-01
Senaste svarsdatum:	2014-04-10
Bakgrund:	Addera bredd i segmentet. Ölen kommer att provas i flighter baserat på literpris, i intervaller om 5 kr/liter
Stil- och smakprofil:	Vi söker en söt, smakrik och nyanserad barley wine med tydlig maltighet, samt inslag av knäck, torkad frukt och apelsin.

Krav på produkten:

Pris till kund:	Max 120 kr/liter
Ursprungsland:	USA
Varukategori enligt EU:	Starköl
Varuslag:	Specialöl
Volym:	Max 650 ml
Förpackning:	Flaska
Tillgänglig volym (liter):	30 000
Övriga krav:	Observera att endast en produkt per producent kan offereras.

148024 Storbritannien eller USA, fatlagrad ale (C)

Sortiment:	Fast sortiment
Distribution:	Standard D, Premium DE (MT 46% AB 66)
Lanseringsdag:	2014-12-01
Senaste svarsdatum:	2014-04-10
Bakgrund:	Addera djup i segmentet. Ölen kommer att provas i fligheter baserat på literpris, i intervaller om 5 kr/liter
Stil- och smakprofil:	Vi söker en mellanmörk till mörk, smakrik och balanserad ale, med tydlig karaktär av whisky- eller bourbonfat.

Krav på produkten:

Pris till kund:	Max 120 kr/liter
Alkoholhalt enligt etikett (volym %):	6-10,5%
Ursprungsland:	Storbritannien eller USA
Varukategori enligt EU:	Starköl
Varuslag:	Specialöl
Volym:	Max 355 ml
Förpackning:	Flaska
Tillgänglig volym (liter):	5 000

Tender process sampling

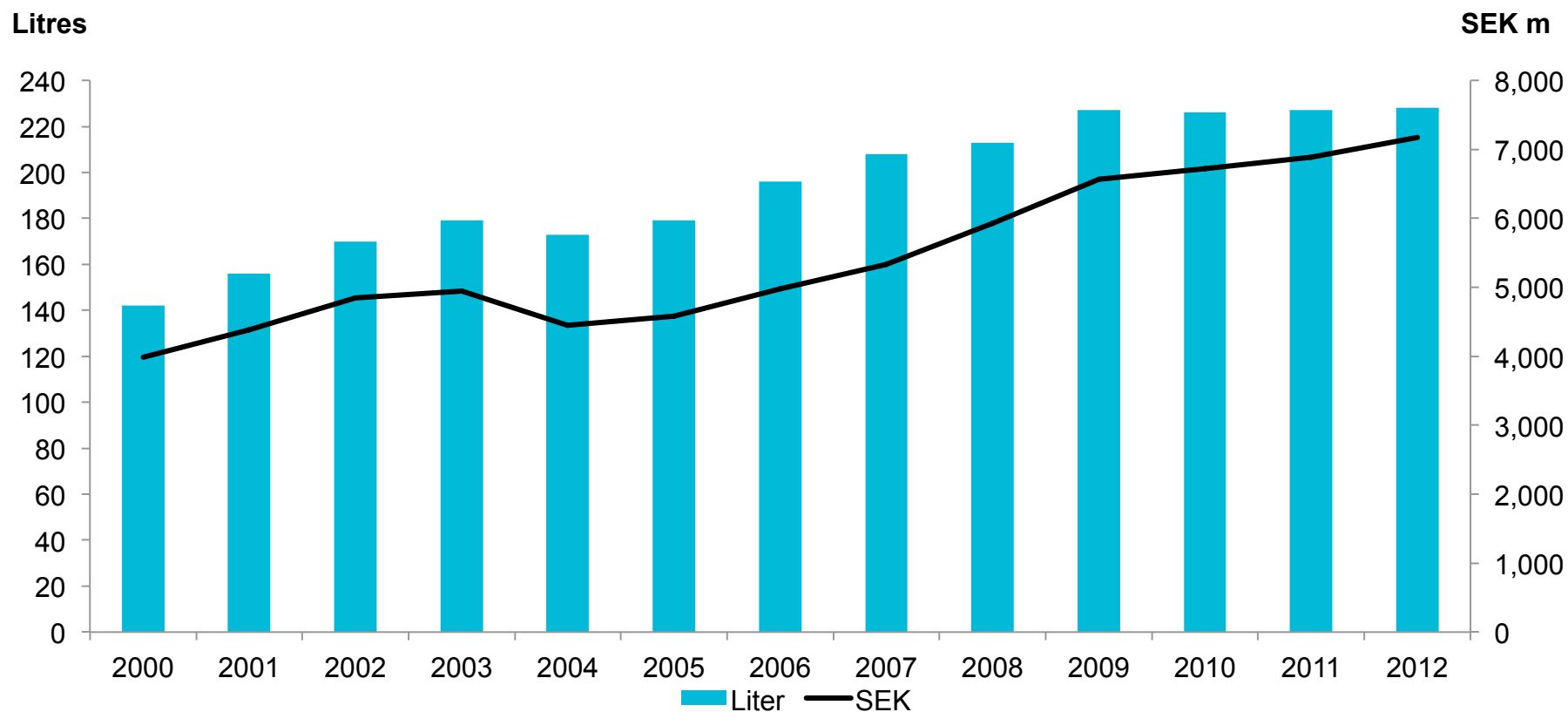


Launch sampling

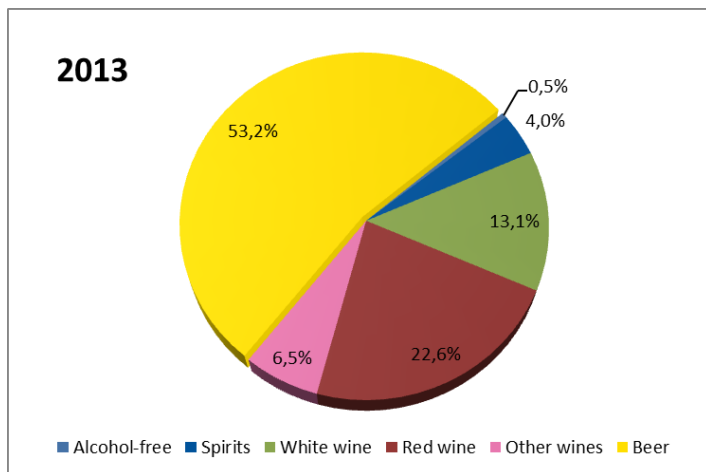
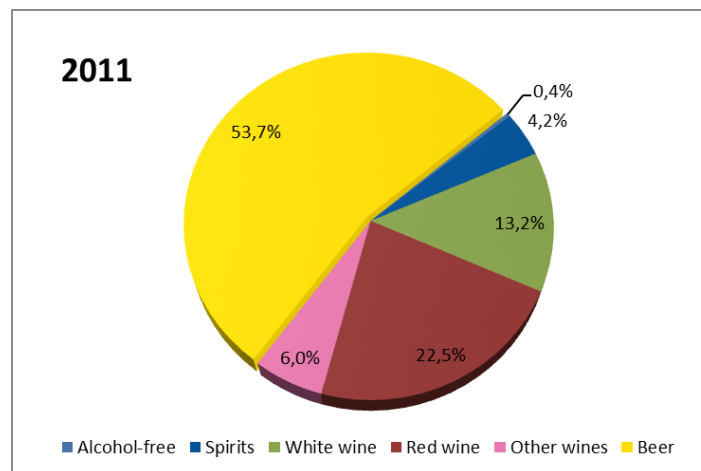
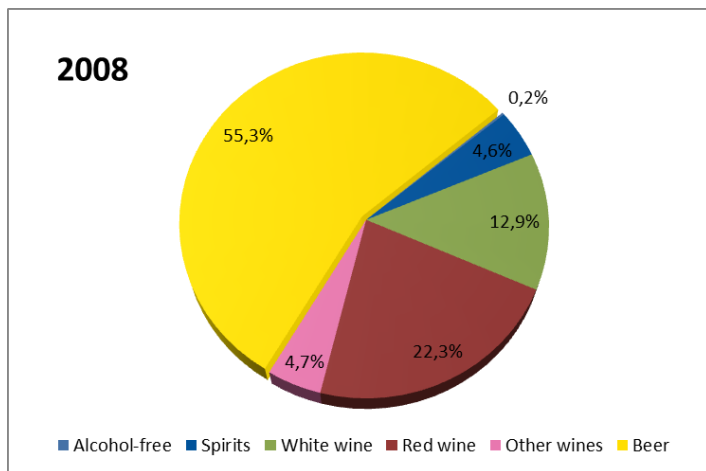
- Sensoric quality monitoring
- Chemical analysis
- Label control
- Characteristic tasting
- Beer columnists' tasting sessions



Sales trend beer

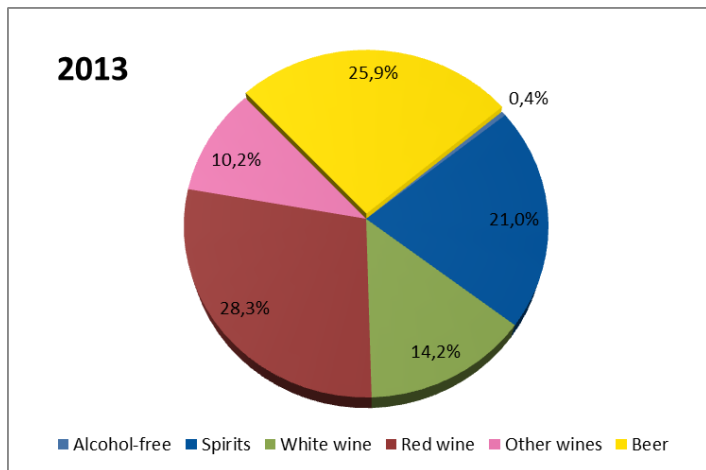
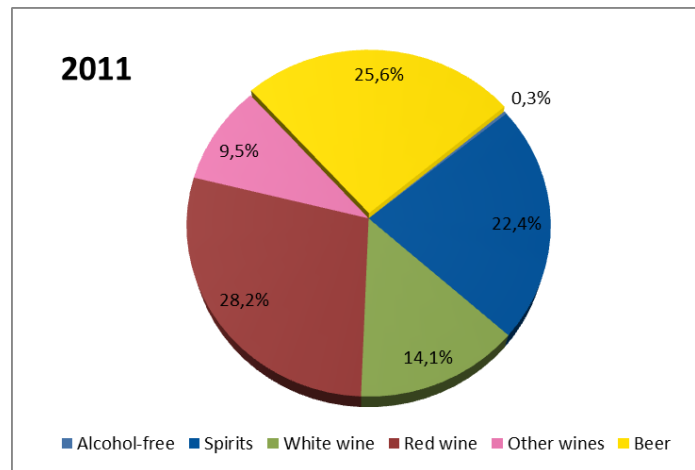
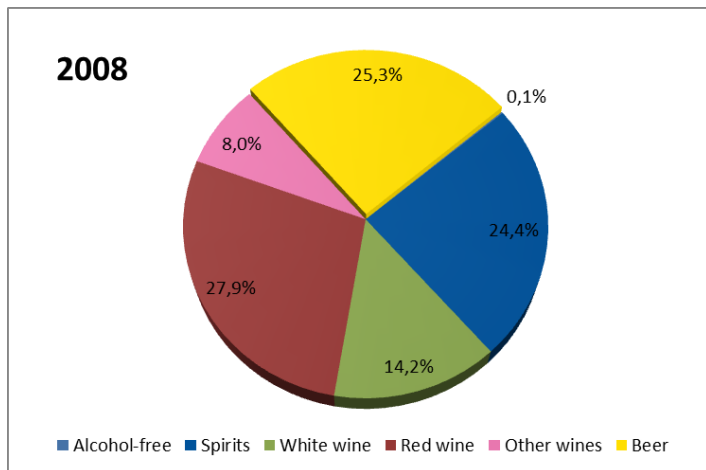


Category volume shares of total sales and development over time



Beer accounts for over half of the volume sold.

Category value shares of total sales and development over time

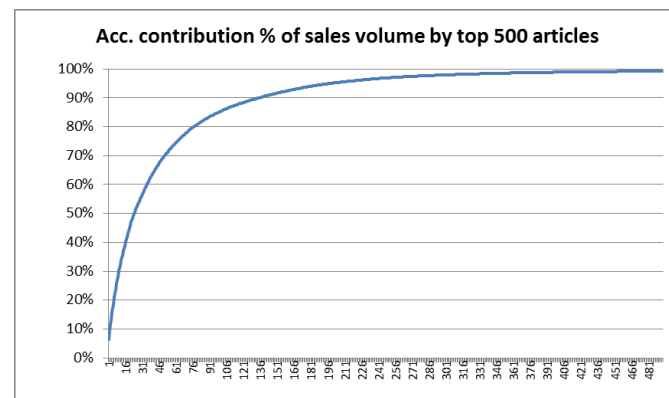
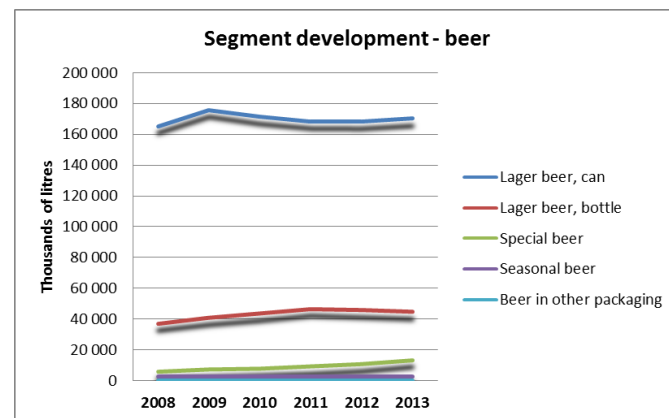
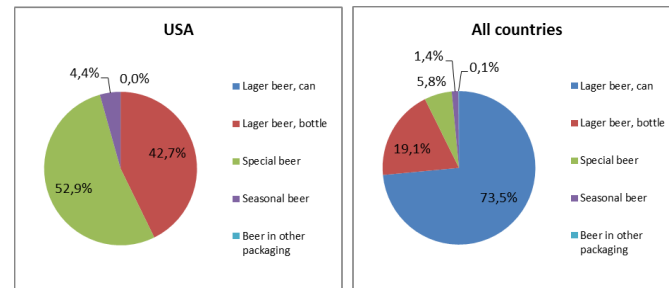


Beer account for roughly 1/4 of the sales value.

Rank	Country of origin	Volume 2013	% vol. share	Acc. %
1	Sverige	178 879 072	71,8%	71,8%
2	Internationellt märke	26 592 918	10,7%	82,5%
3	Tjeckien	12 361 440	5,0%	87,5%
4	Tyskland	5 075 625	2,0%	89,5%
5	Storbritannien	4 944 532	2,0%	91,5%
6	USA	3 757 648	1,5%	93,0%
7	Danmark	2 904 749	1,2%	94,2%
8	Mexiko	2 174 679	0,9%	95,1%
9	Finland	2 136 766	0,9%	95,9%
10	Belgien	1 853 648	0,7%	96,7%
11	Spanien	1 722 062	0,7%	97,4%
12	Nederländerna	1 162 537	0,5%	97,8%
13	Irland	925 018	0,4%	98,2%
14	Italien	780 894	0,3%	98,5%
15	Thailand	625 588	0,3%	98,8%
16	Kroatien	602 333	0,2%	99,0%
17	Jamaica	506 643	0,2%	99,2%
18	Österrike	492 259	0,2%	99,4%
19	Colombia	263 247	0,1%	99,5%
20	Frankrike	215 950	0,1%	99,6%
Total volume		248 978 565*	100,0%	

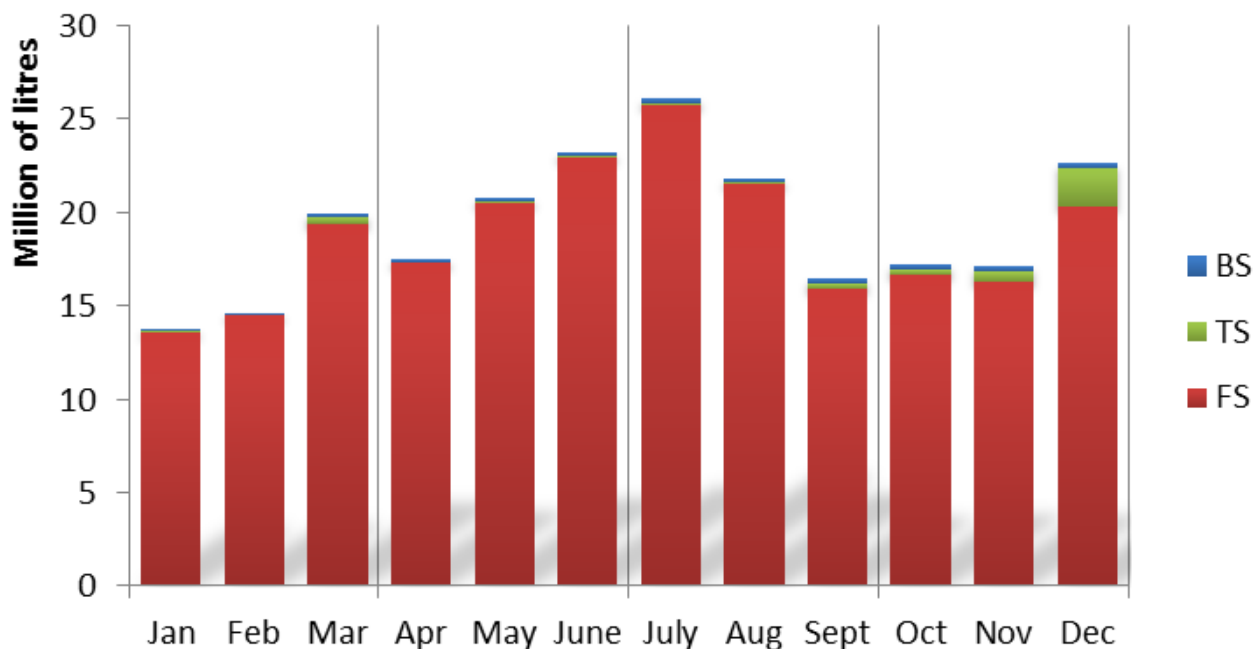
* Total volume figures include beer and cider & R-to-D beverages

Ranking	Article ID	Product name	Country	Segment	2013	vol. Share %	Acc. Vol %	Vol. growth vs.
1	508055	122212 - Sofiero Original 5,2% brk 500 ml	Sverige	Öl lager burk	14 813 543	6,4%	6,4%	-11,5%
2	507949	141212 - Norrlands Guld Export 5,3% brk 500ml	Sverige	Öl lager burk	7 966 054	3,4%	9,8%	-3,6%
3	508317	162512 - Fem komma tvåan 5,2% brk 500 ml	Sverige	Öl lager burk	7 718 392	3,3%	13,2%	-11,3%
4	507920	120312 - Mariestads Export 5,3% brk 500 ml	Sverige	Öl lager burk	6 682 472	2,9%	16,1%	1,0%
5	508182	127512 - Stockholm Festival 5,3% brk 500 ml	Sverige	Öl lager burk	6 034 737	2,6%	18,7%	-10,8%
6	507795	114512 - Pripps Blå 5% brk 500 ml	Sverige	Öl lager burk	5 982 988	2,6%	21,3%	-5,0%
7	508314	144612 - Kung 5.2% brk 500 ml	Sverige	Öl lager burk	5 657 155	2,4%	23,7%	48,6%
8	508019	127312 - Sofiero Guld 7,5% brk 500 ml	Sverige	Öl lager burk	5 575 111	2,4%	26,1%	1,8%
9	508212	147712 - Småland 5,2% brk 330 ml	Sverige	Öl lager burk	4 967 736	2,1%	28,3%	-9,4%
10	508097	148112 - Fagerhult Export 5,3% brk 330 ml	Sverige	Öl lager burk	4 694 664	2,0%	30,3%	40,1%
11	507955	142112 - Spendrups Prem Gold 5,9% brk 500 ml	Sverige	Öl lager burk	4 499 558	1,9%	32,2%	-4,3%
12	507758	143315 - Falcon Export 5,2% brk 330 ml	Sverige	Öl lager burk	3 930 509	1,7%	33,9%	14,2%
13	507701	127912 - Bellman 6,0% brk 500 ml	Sverige	Öl lager burk	3 801 486	1,6%	35,6%	-1,2%
14	507789	1139312 - Millennium Starköl 5,1% brk 500 ml	Sverige	Öl lager burk	3 754 252	1,6%	37,2%	-7,1%
15	507779	143312 - Falcon Export 5,2% brk 500 ml	Sverige	Öl lager burk	3 697 682	1,6%	38,8%	9,1%
16	508311	144512 - Bryggmäst Prem Guld 5,7% brk 500ml	Sverige	Öl lager burk	3 678 143	1,6%	40,4%	6,2%
17	507799	129612 - Pripps Extra Stark 7,2% brk 500 ml	Sverige	Öl lager burk	3 628 495	1,6%	41,9%	11,6%
18	508323	156812 - Sju komma tvåan 7,2% brk 500 ml	Sverige	Öl lager burk	3 387 552	1,5%	43,4%	16,6%
19	507861	167912 - Staropramen 5% brk 500 ml	Tjeckien	Öl lager burk	3 084 314	1,3%	44,7%	5,9%
20	507965	144712 - Spendrups Bright 5% brk 500 ml	Sverige	Öl lager burk	2 816 943	1,2%	46,0%	7,2%



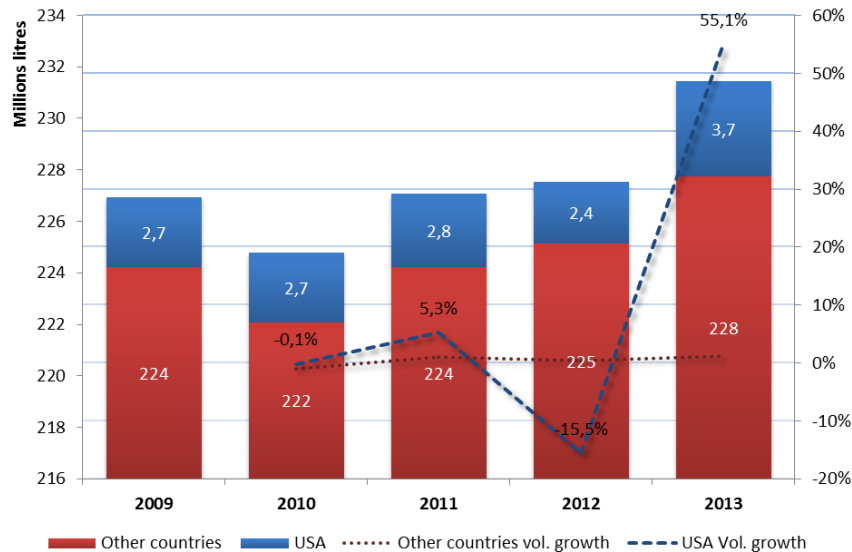
Monthly sales 2013

Sales pattern by month

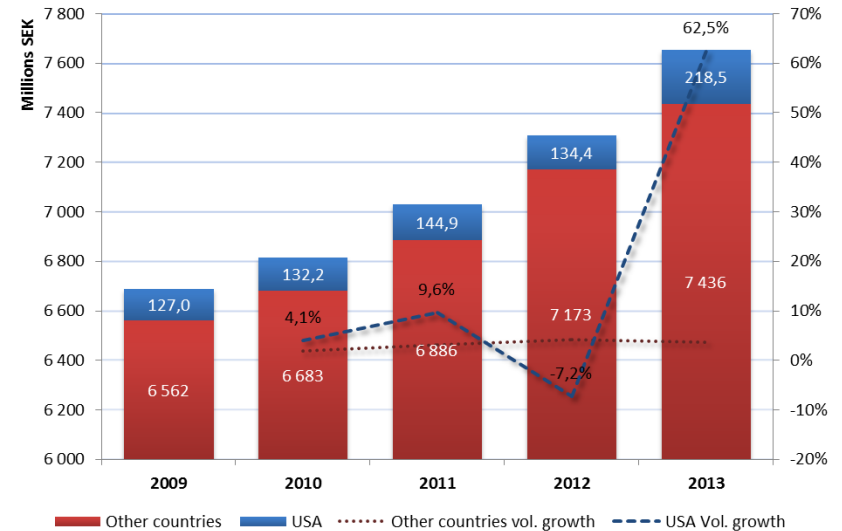


Year-to-year development in beer incl. cider & RTD beverages, US vs. other countries

Beer volume sales 2009-2013



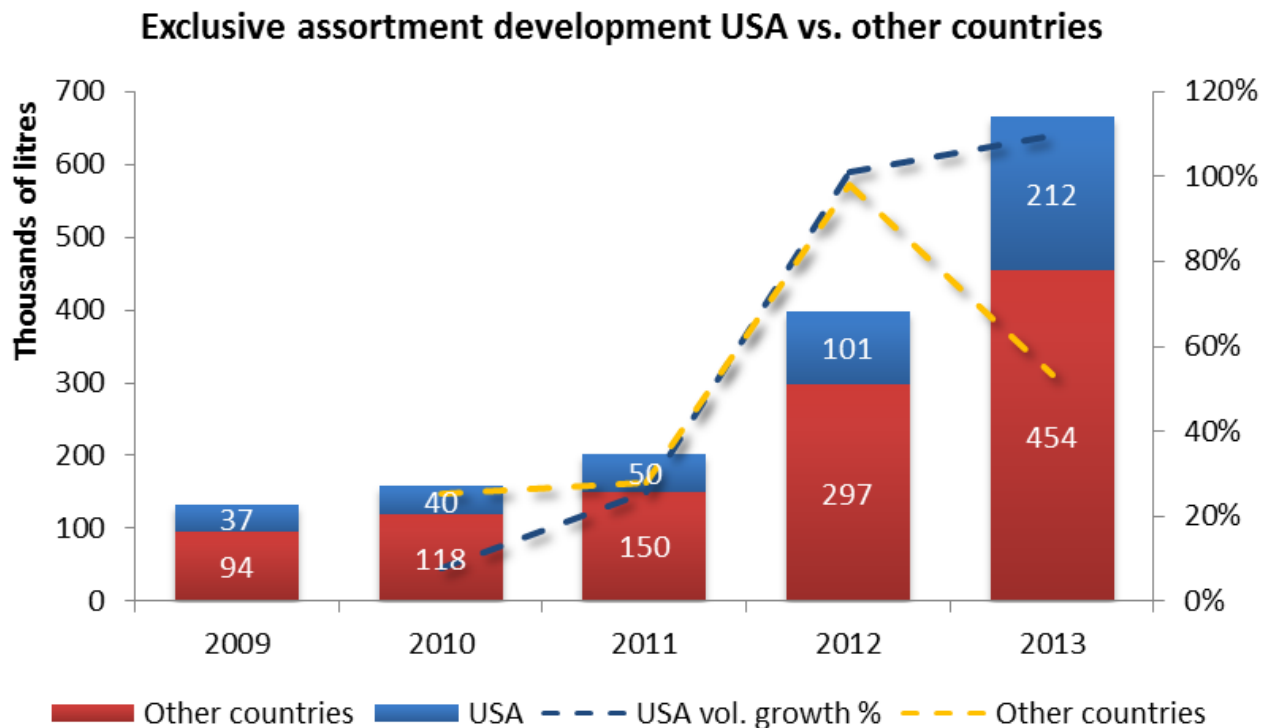
Beer value sales 2009-2013



Over half of the sales volume comes from the beer category, equivalent to nearly 250 million liters sold on annual basis. In 2013 there was a remarkable volume uplift for US beer, from 2,4 to 3,7 million liters (+55%)

Whereas the volume has been relatively stable over the past 5 years in beer, the turnover (sales excl. VAT) has grown by 4,4% on average due to the premiumization effect, i.e. consumers switching to more expensive beer types.

Exclusive assortment development






















- US volume in special beer accelerated in growth in 2013 vs. other countries. The volume was doubled in US produced special beer in exclusive assortment. In general Swedish consumers have an increasing interest in exclusive selected beer as the special beer segment in exclusive assortment has grown over 400% during the past five years (2009 vs. 2013)

Overview exclusive assortment by country

Top countries



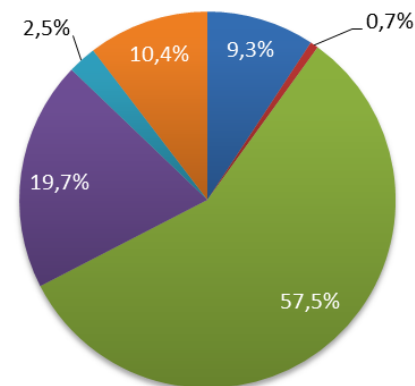
Ranking	Country of origin	2009	2010	2011	2012	2013	Total	% share	Dev. 5 years
1	USA	37 334	40 127	50 410	101 322	212 263	441 456	28,4%	
2	United Kingdom	21 074	32 780	44 152	106 273	122 570	326 848	21,0%	
3	Sweden	14 676	36 279	42 071	68 616	100 497	262 138	16,9%	
4	Belgium	23 669	20 531	26 908	23 281	50 069	144 458	9,3%	
5	Denmark	6 087	10 823	21 549	30 908	36 407	105 774	6,8%	
6	Germany	9 982	6 183	448	25 239	59 082	100 934	6,5%	
7	International label			1 607	11 413	47 787	60 807	3,9%	
8	Norway	4 279	1 070	3 005	18 644	16 273	43 270	2,8%	
9	Italy	1 624	877	106	6 152	6 965	15 723	1,0%	
10	France	2 689	2 333	2 300	3 747	2 852	13 920	0,9%	
11	Netherlands	2 652	105	3 163	317	4 402	10 640	0,7%	
12	Austria	1 822	1 578	1 306	1 176	1 999	7 881	0,5%	
13	Canada	2 488	135	10		3 444	6 077	0,4%	
14	Spain	1 539	2 426	25			3 990	0,3%	
15	Australia		2 361		1 019	200	3 580	0,2%	
16	New Zealand			3 357			3 357	0,2%	
17	Schwitzerland	1 434	67	0			1 502	0,1%	
18	Japan					1 490	1 490	0,1%	
	Totalsumma	131 348	157 674	200 416	398 108	666 299	1 553 845	100,0%	

Overview exclusive assortment by segment

Litres

Exclusive assortment	2009	2010	2011	2012	2013	
Total TSE	131 348	157 674	200 416	398 108	666 299	■ ■ ■ ■ ■
Special beer	118 131	150 830	191 674	371 591	625 133	■ ■ ■ ■ ■
6301 Ale bottle (...-5,9%)	5 156	14 362	20 495	32 389	57 880	■ ■ ■ ■ ■
6302 PORTER/STOUT bottle (...-5,9%)	2 898	2 967	351	14 301	4 399	■ ■ ■ ■ ■
6305 ALE extra strong (6,0%-..)	79 773	90 287	110 544	208 435	359 211	■ ■ ■ ■ ■
6306 PORTER/STOUT extra strong (6,0%-..)	20 418	24 325	55 149	80 588	123 298	■ ■ ■ ■ ■
6307 Wheat beer (Weissbier) bottle/can	5 341	10 847	305	12 522	15 335	■ ■ ■ ■ ■
6308 Other beer	4 545	8 041	4 828	23 355	65 010	■ ■ ■ ■ ■
Seasonal beer	285	975	1 143	26		■ ■ ■ ■ ■
6504 X-mas beer	278	975	1 143	26		■ ■ ■ ■ ■
Lager beer, bottle	12 931	5 870	7 599	26 491	41 166	■ ■ ■ ■ ■
6201 LAGER bottle international (...-5,9%)_X	405					■
6202 LAGER bottle <=355ML & >=17/>355ML & >=20 (<6,0%)			447	10 248	21 315	■ ■ ■
6203 LAGER extra strong, bottle (6,0%-..)	12 314	3 787	7 135	7 019	16 599	■ ■ ■ ■ ■
6204 Lager, dark, bottle	212	2 083	17	9 224	3 252	■ ■ ■ ■ ■
Total	131 348	157 674	200 416	398 108	666 299	■ ■ ■ ■ ■

Special beer by segment



- 6301 Ale bottle (...-5,9%)
- 6302 PORTER/STOUT bottle (...-5,9%)
- 6305 ALE extra strong (6,0%-..)
- 6306 PORTER/STOUT extra strong (6,0%-..)
- 6307 Wheat beer (Weissbier) bottle/can
- 6308 Other beer

Products launched the last year





















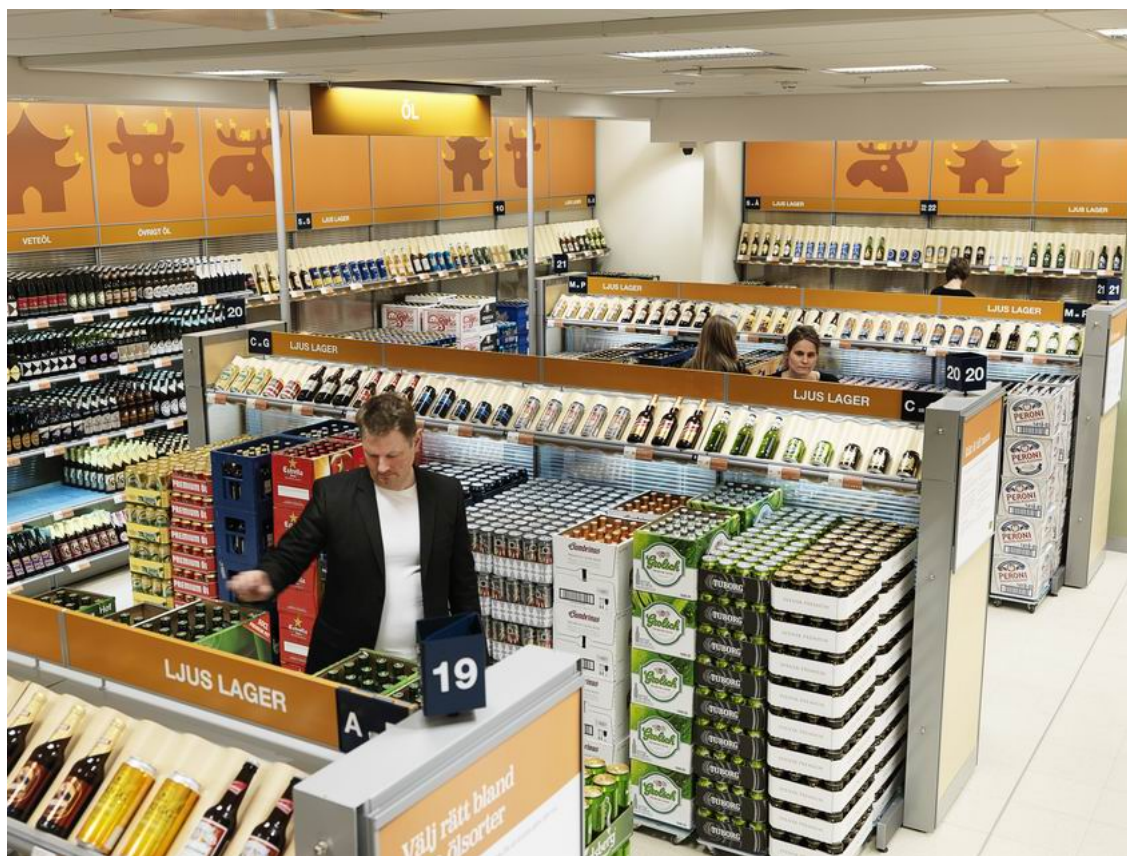








Hope to see your products in our stores in the future!



Facts on selling to Systembolaget

- Systembolaget buy through importers
- As a foreign producer/ supplier you need an importer or be registered with Swedish tax authorities
- Distribution/ warehousing needed as Systembolaget buy free delivered to each store
- Sales statistics available on monthly basis
- Systembolaget mark up is transparent
- And mind the BBD!





Systembolaget

Thank you!



April 9th 2014

Systembolaget