

## **A GUIDE TO THE ALCOHOL INDUSTRY**

# Major Alcohol Companies in Australia: Producers and Distributors

JUNE 2017

# Contents

Introduction.....2

## Producers and Distributors

Anheuser-Busch InBev.....3	Treasury Wine Estates ..... 14
CUB.....4	Australian Vintage Limited..... 14
Kirin Holdings Company Ltd.....5	Pernod Ricard..... 15
Lion.....5	Pernod Ricard Winemakers Australia ... 15
Heineken International.....5	Constellation Brands..... 16
Heineken Lion .....5	Accolade Wines Australia..... 16
Coopers Brewery .....7	Brown-Forman ..... 17
Premium Beverages.....7	Brown-Forman Australia..... 17
Carlsberg Group .....7	Asahi Group Holdings ..... 18
Diageo.....8	Asahi Premium Beverages ..... 18
Diageo Australia.....8	Campari Group ..... 19
LVMH.....8	Campari Australia..... 19
Moët Hennessey .....8	Woolworths Limited.....20
Suntory Holdings Limited ..... 10	Pinnacle Drinks.....20
Beam Suntory Australia ..... 10	William Grant & Sons ..... 21
Spirits Platform..... 10	William Grant & Sons Australia ..... 21
Coca-Cola Amatil..... 11	Vok Beverages.....22
Australian Beer Company..... 11	Sazerac Co ..... 23
Molson Coors..... 11	SouthTrade International..... 23
Chilli Marketing ..... 11	Gage Road Brewing Co ..... 24
Casella Family Brands..... 11	Onebev ..... 24
Bacardi Limited..... 13	island2island Beverage Company..... 25
Bacardi-Martini Australia ..... 13	ASM Liquor..... 25
References.....26	

# Introduction

This is a brief guide to the major alcohol companies in Australia and how they fit into the global alcohol industry. It outlines the companies and the alcohol products they produce, own, distribute or market.

There have been significant changes in the global alcohol industry since the previous version of this guide in 2014. The acquisition of SABMiller by AB InBev in 2016 resulted in AB InBev becoming the world's largest beer company, with an estimated 46% share of global beer profits and 27% share of global beer volumes.<sup>1</sup> This acquisition has had substantial flow on effects to the Australian industry, with many brands moving between companies.

Evidence indicates that the alcohol industry actively works to influence alcohol policy in Australia.<sup>2-4</sup> It is important for all those with an interest in alcohol policy to understand the nature of the industry to help inform a broader understanding of how alcohol companies and industry groups seek to influence alcohol policy. A part of this is knowing who produces, distributes and promotes the major alcohol brands in Australia, and recognising the globalised nature of the alcohol industry.

The information has been collated and summarised from a wide range of sources including alcohol company websites, annual reports and industry publications. Due to some companies' extensive product lists, we have not included all products in this guide.

As the industry is constantly changing, this document should be taken as a guide only. The information is accurate to the best of our knowledge and we welcome any comments or feedback. We will endeavour to regularly update the information.

This guide to the major alcohol companies in Australia is complemented by two other guides, Major Alcohol Sales Outlets and Peak Bodies and Representative Groups.

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## Abbreviations used:

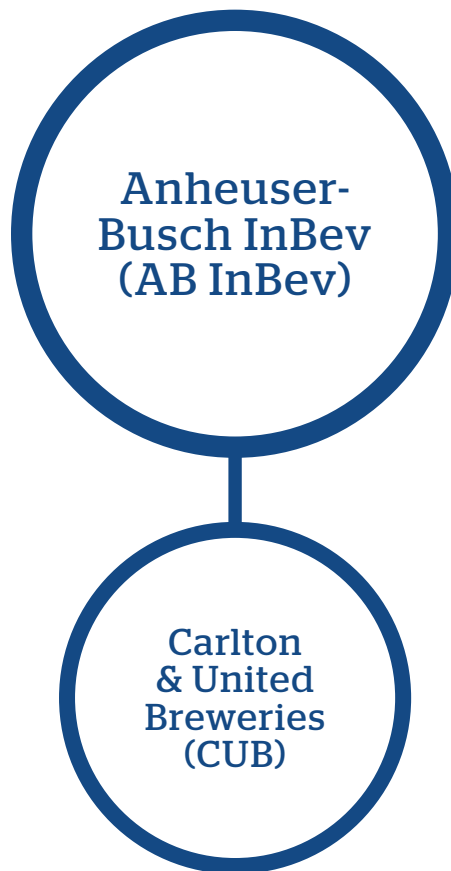
RTD: Ready-To-Drink.

Alternative names include  
alcopops or pre-mixed drinks.

RTS: Ready-To-Serve.

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Youth, Curtin University.



#### **Anheuser-Busch InBev (AB InBev)**

- World's largest beer company.<sup>1</sup>
- Owns more than 400 beer brands, including seven of the most valuable beer brands in the world – **Budweiser** (1), **Bud Light** (2), **Stella Artois** (4), **Skol** (5), **Corona** (6), **Aguila** (9) and **Brahma** (10).<sup>5</sup>
- In 2015 generated revenues of US\$55 billion.<sup>6</sup>
- Has operations in over 50 countries and sells their beers in over 100 countries.<sup>7</sup>
- History of major acquisitions<sup>8</sup>:
  - In 1987, two Belgium breweries merged (Artois and Piedboeuf) to form Interbrew.
  - In 1999, two Brazilian brewers merged (Antartica and Brahma) to form AmBev.
  - In 2004, Interbrew and AmBev merged to form InBev.
  - In 2008, InBev and Anheuser-Busch merged to form Anheuser-Busch InBev (AB InBev).
  - In 2013, AB InBev acquired Grupo Modelo.
  - In November 2015, AB InBev announced plans to acquire SABMiller Limited. This would result in AB InBev having operations "in virtually every major beer market and an expanded portfolio that includes global, multi-country and local brands."<sup>9</sup> The acquisition was completed on 10 October 2016. The acquisition involved completing divestitures of SABMiller's interest in MillerCoors (a joint venture in the US between Molson Coors and SABMiller), SABMiller's equity interest in China

Resources Snow Breweries, and SABMiller's interest in the Peroni, Grolsch and Meantime brand families and businesses.<sup>10</sup> AB InBev also entered a binding agreement in December 2016 to sell SABMiller owned businesses in Poland, the Czech Republic, Slovakia, Hungary and Romania to Asahi Group Holdings.<sup>11</sup>

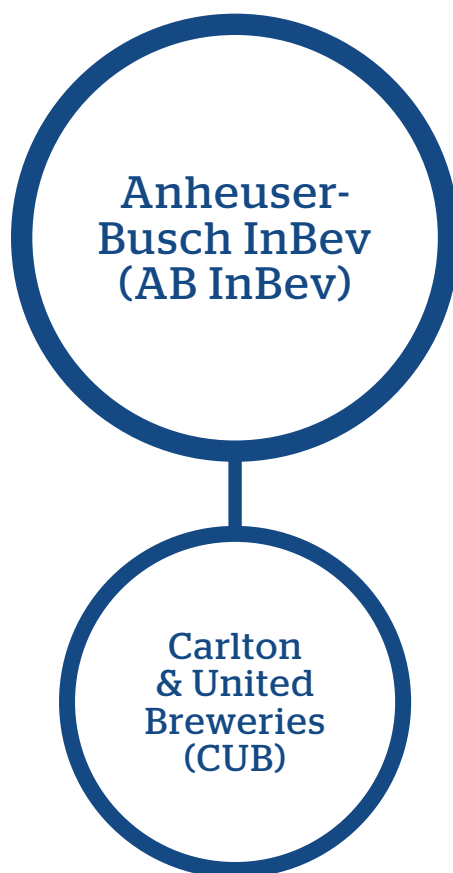
- Following the acquisition of SABMiller, AB InBev is the world's largest beer company with an estimated 46% share of global beer profits and 27% share of global beer volumes.<sup>1</sup>
- As at October 2016, Altria Group (parent company of tobacco company Philip Morris USA) has a 9.57% share in AB InBev<sup>12</sup> and two seats on AB InBev's Board of Directors.<sup>13</sup>
- Operations are organised in nine geographic zones: Africa, Asia Pacific North (including Australia), Asia Pacific South, Europe, Latin America COPEC, Latin America North, Latin America South, Middle Americas, North America.<sup>7</sup>
- Global headquarters: Leuven, Belgium.

Global brands include:

**Budweiser, Becks, Corona, Stella Artois.**

#### **Carlton & United Breweries (CUB)**

The acquisition of SABMiller means CUB is now owned by AB InBev. See over page for CUB details.



#### **Carlton & United Breweries (CUB)**

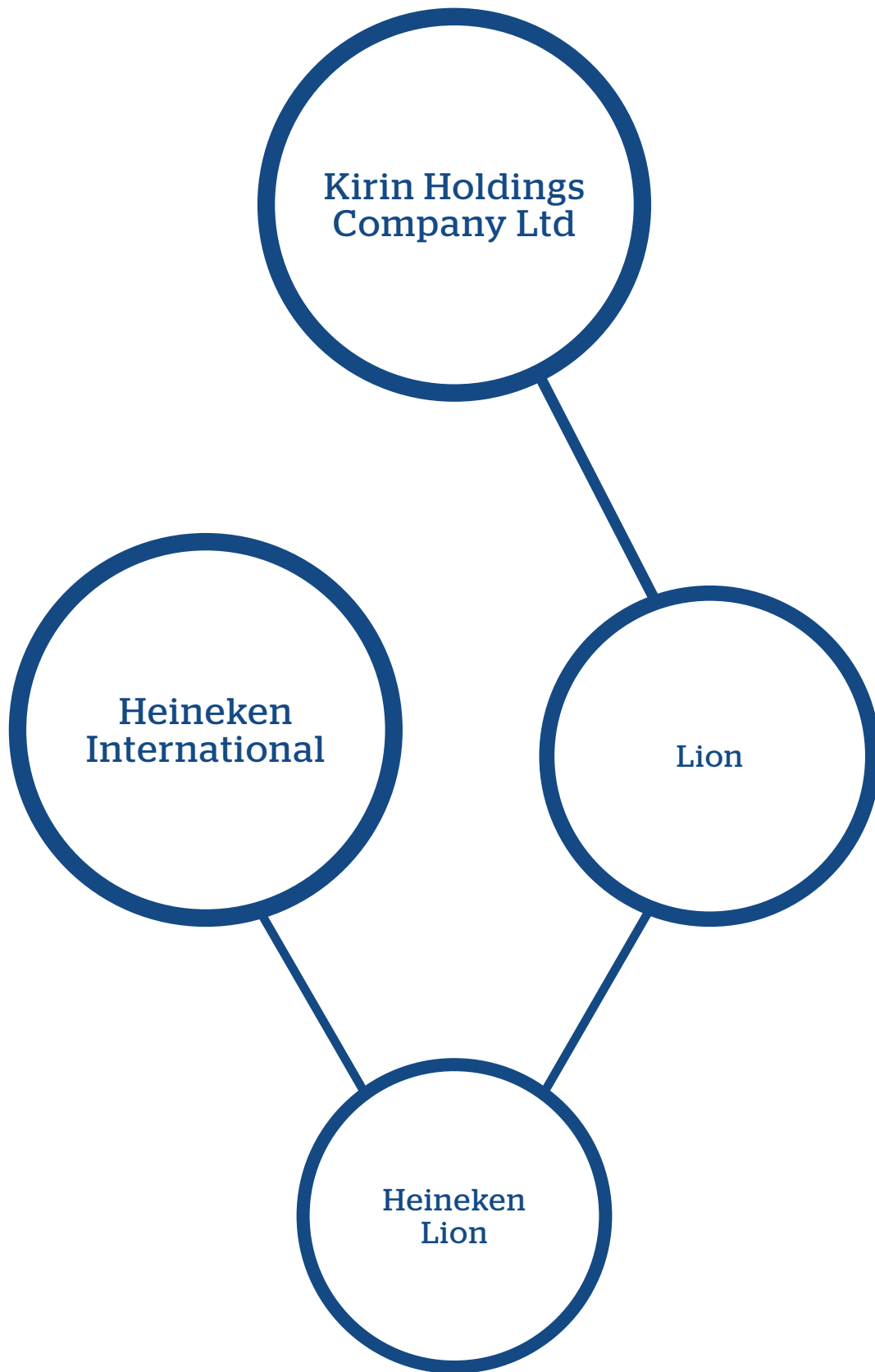
- History of CUB:
  - Foster's Group was acquired by SABMiller in 2011.<sup>14</sup>
  - Foster's Group changed its name to CUB in 2012.
  - SABMiller was acquired by AB InBev in 2016.<sup>14</sup>
- In 2016, CUB had 42.1% of the beer market share in Australia.<sup>15</sup>
- Estimated revenue of \$1.73 billion in 2015-16.<sup>15</sup>
- Financially contributes to DrinkWise.<sup>16</sup>
- Headquarters: Melbourne, Australia.

Beer and cider brands include:

**Beck's, Budweiser, Bulmers, Carlton, Cascade, Corona, Crown, Foster's, Great Northern, Grolsch, Hoegaarden, Leffe, Matilda Bay, Mercury, Peroni, Pilsner Urquell, Pure Blonde, Stella Artois, Strongbow, Victoria Bitter (VB), Yak Ales.**

Spirits (including RTDs):

**Akropolis Oyo, Cougar Bourbon (includes RTDs), Coyote Tequila, Karloff Vodka, Prince Albert's Gin, The Black Douglas (includes RTDs).**



### **Kirin Holdings Company Ltd**

- Range of businesses including alcohol and non-alcoholic beverages, pharmaceuticals and biochemicals.<sup>17</sup>
- Headquarters: Tokyo, Japan.

### **Lion**

- Leading brewer in Australia and New Zealand, owning four of the top ten beer brands in Australia and six of the top 10 beer brands in New Zealand.<sup>18</sup>
- Formed in 2009 when Kirin Holdings assumed 100% ownership of Lion Nathan and merged it with National Foods (owned by Kirin since 2007).<sup>19</sup>
- Lion acquired Little World Beverages in 2012 (owner of Little Creatures Brewery)<sup>19</sup>, and acquired Byron Bay Brewing Co in 2016.<sup>20</sup>
- In 2016 Lion had 42.6% of the beer market share in Australia.<sup>15</sup>
- Estimated revenue of \$1.83 billion in 2015-16.<sup>15</sup>
- Financially contributes to DrinkWise.<sup>16</sup>
- Foundation member of Alcohol Beverages Australia.<sup>21</sup>
- Headquarters: Sydney, Australia.

Beer and cider brands include:

**5 Seeds Cider, Emu, Guinness** (Diageo product - Lion manages the brewing, distribution, sales and marketing in Australia<sup>22</sup>), **Hahn, Heineken, James Boag's, James Squire, Kirin, Little Creatures, Swan, Tooheys, XXXX Gold, West End Draught, White Rabbit.**

### **Heineken International**

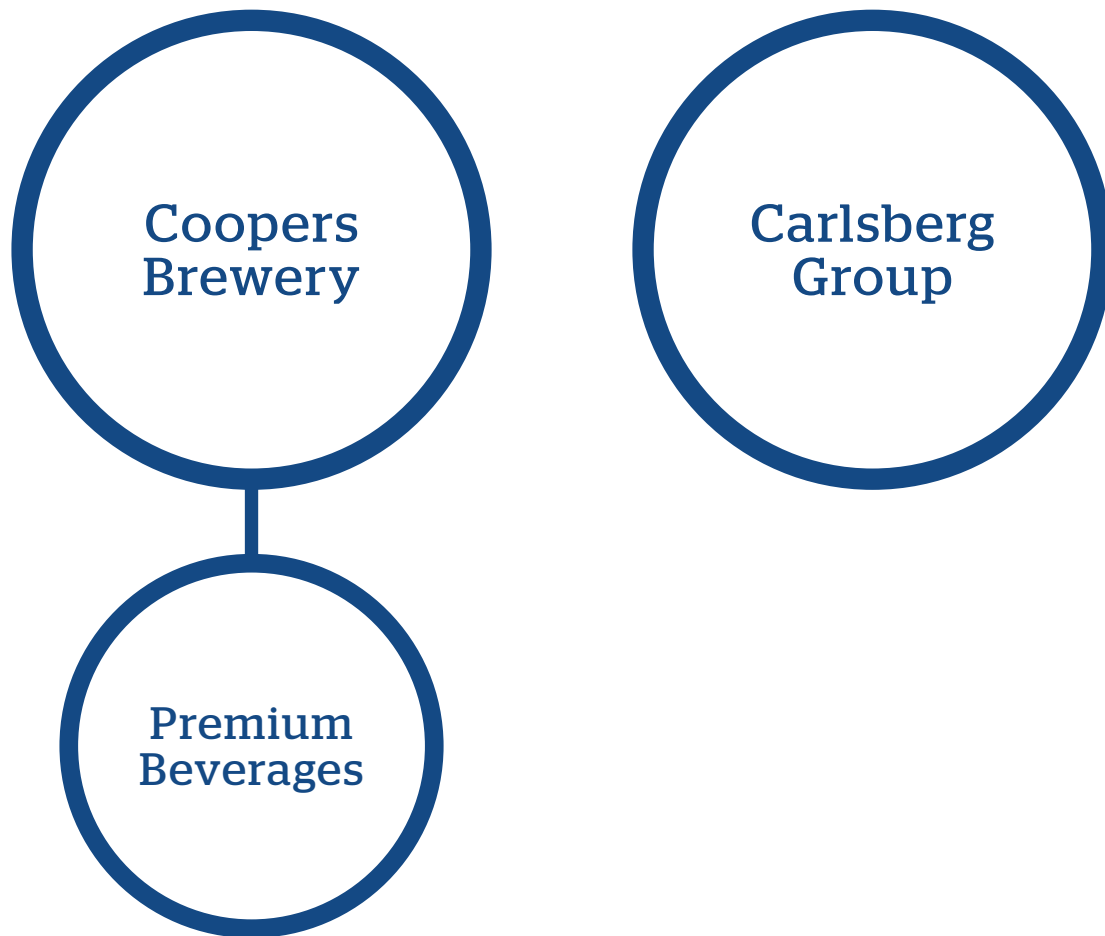
- Owns, markets and sells more than 250 international, regional and local beers and ciders.<sup>23</sup>
- Owns 11 malteries across the world and operates 156 breweries, cider plants and other production facilities.<sup>23</sup>
- In 2015, produced 188.3 million hectolitres of beer and delivered revenues of EUR\$20.5 billion.<sup>23</sup>
- Headquarters: Amsterdam, Netherlands.

Brands include:

**Heineken, Amstel, Sol, Tiger, Bintang**

### **Heineken Lion**

- Joint venture between Heineken International and Lion established in 2004.<sup>19</sup>
- Heineken Lion brews, markets and distributes Heineken in Australia.
- Had sales of \$67.4 million and a net profit of \$10.5 million in 2014-15.<sup>24</sup>



### Coopers Brewery

- Largest Australian-owned brewery.<sup>15</sup>
- In 2016 estimated to have 4.7% of the beer market share in Australia.<sup>15</sup>
- Sold 81.5 million litres of beer and had \$245 million revenue during 2015-16.<sup>25</sup>
- Financially contributes to DrinkWise.<sup>16</sup>
- Headquarters: Adelaide, Australia.

Brands include:

**Coopers Ale, Stout, Premium Lager and light varieties, Brooklyn, Carlsberg** (Carlsberg Group beer, distributed by Coopers Brewery), **Kronenbourg 1664** (Carlsberg Group beer, distributed by Coopers Brewery), **Mythos, Sapporo, Thatchers Gold Cider**

### Premium Beverages

- Manages the distribution and below-the-line marketing activity for Coopers Brewery brands outside South Australia.<sup>26</sup>
- Subsidiary of Coopers Brewery.
- Headquarters: Melbourne, Australia.

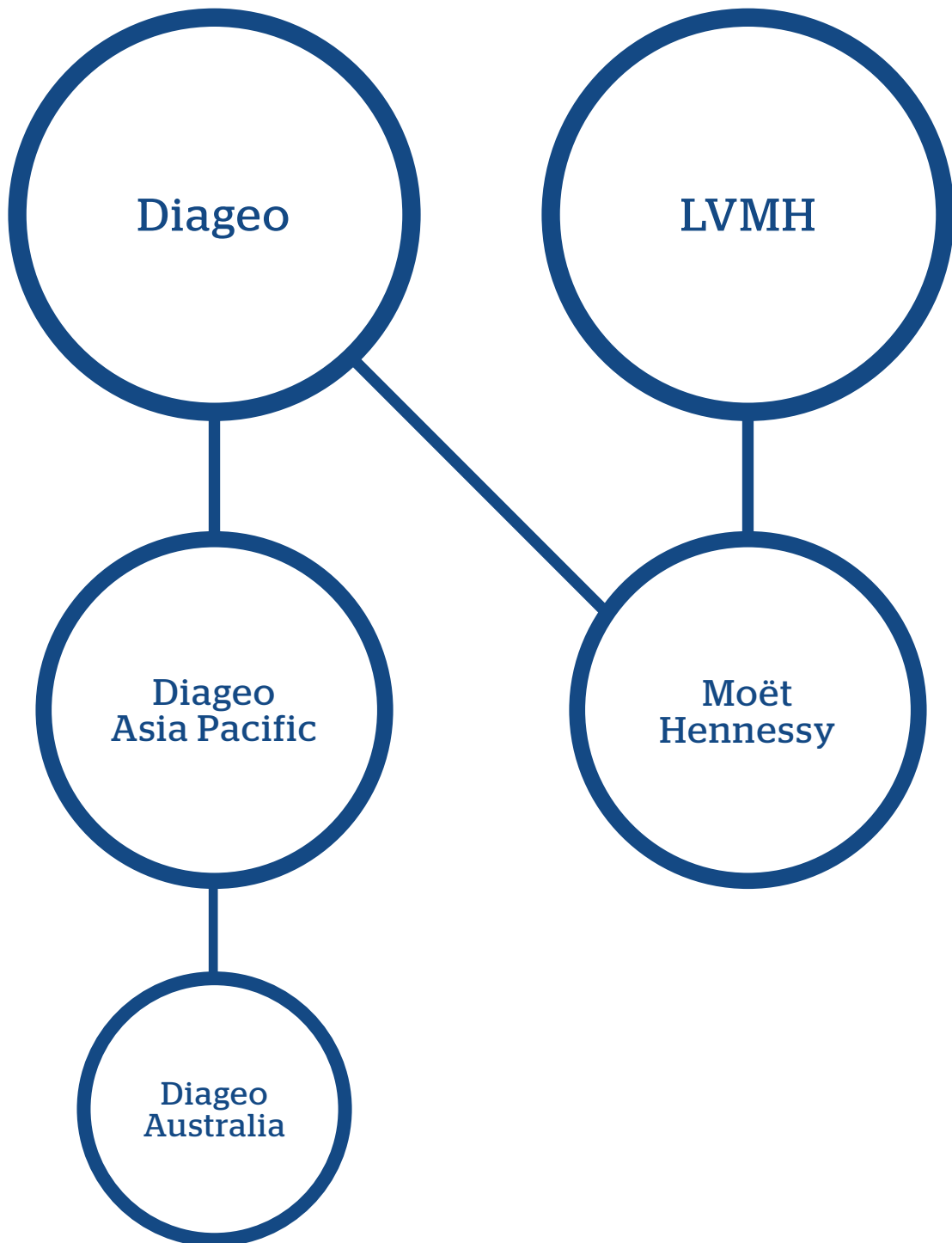
### Carlsberg Group

- "One of the leading brewery groups in the world".<sup>27</sup>
- Operates in three regions: Western Europe, Eastern Europe, and Asia and Africa.
- In 2016 had a net revenue of DKK\$62.6 billion.<sup>28</sup>
- Headquarters: Copenhagen, Denmark.

Brands include:

**Carlsberg** and **Kronenbourg 1664** (distributed by Coopers Brewery), **Somersby Cider** (distributed by Asahi Premium Beverages)





### Diageo

- Has a presence in over 180 countries.<sup>29</sup>
- Five geographical regions: North America, Europe, Africa, Latin America & Caribbean, Asia Pacific.<sup>29</sup>
- For the year ending June 2016 Diageo reported net sales of £10,485 million, an operating profit of £2,841 million and a marketing spend of £1,562 million.<sup>30</sup>
- Own top two largest spirits brands in the world (Johnnie Walker and Smirnoff) and 20 of the world's top 100 spirits brands.<sup>31</sup>
- Headquarters: London, UK.

### Diageo Asia Pacific

- Comprises North Asia, South East Asia, Greater China, India, Middle East and Australia and New Zealand.

### Diageo Australia

- In 2016 Diageo Australia generated total revenue of \$535.7 million.<sup>32</sup>
- In 2016 had 24.5% of spirit market share<sup>33</sup> and 23.5% of RTD mixed spirit market share in Australia.<sup>34</sup>
- Financially contributes to DrinkWise.<sup>16</sup>
- Foundation member of Alcohol Beverages Australia.<sup>21</sup>
- Headquarters: Sydney, Australia.

Beer brands include:

**Guinness** (managed by Lion in Australia)

Spirit brands include:

**Baileys, Bulleit Bourbon (includes RTDs – Bourbon & Cola), Bundaberg Rum (includes RTDs – Rum & Cola, Bare No Sugar Cola, Mutiny Spiced Rum & Zero Sugar Cola, Tropics Coconut & Pineapple with Soda, Tropics Mango & Passionfruit with Soda), Captain Morgan Rum (includes RTDs – Rum & Cola), Ciroc Vodka, Don Julio tequila, Gordon's Gin (includes RTDs – Gin & Tonic, Elderflower Spritz), J & B Scotch Whiskey, Johnnie Walker (includes RTDs – Red Label & Cola, Red Label & Dry), Ketel One Vodka, Pimm's (includes RTDs – No 1 Cup Lemonade & Ginger Ale, Sparkling Cup), Smirnoff Vodka (includes RTDs – Ice Double Black, Ice Double Black Zero Sugar, Ice Double Black & Guarana, Ice Red, Classic Mix Lime & Soda, Pure Passionfruit Lime & Soda, Pure Ginger Lime & Soda, Pure Cranberry Apple & Soda, Peach & Iced Tea, Raspberry & Lime, Apple Elderflower & Soda; RTS 2L casks – Signature Serves Cranberry, Cloudy Apple and Blood Orange), Ruski RTDs, Talisker Scotch Whiskey, Tanqueray London Dry Gin**

### LVMH

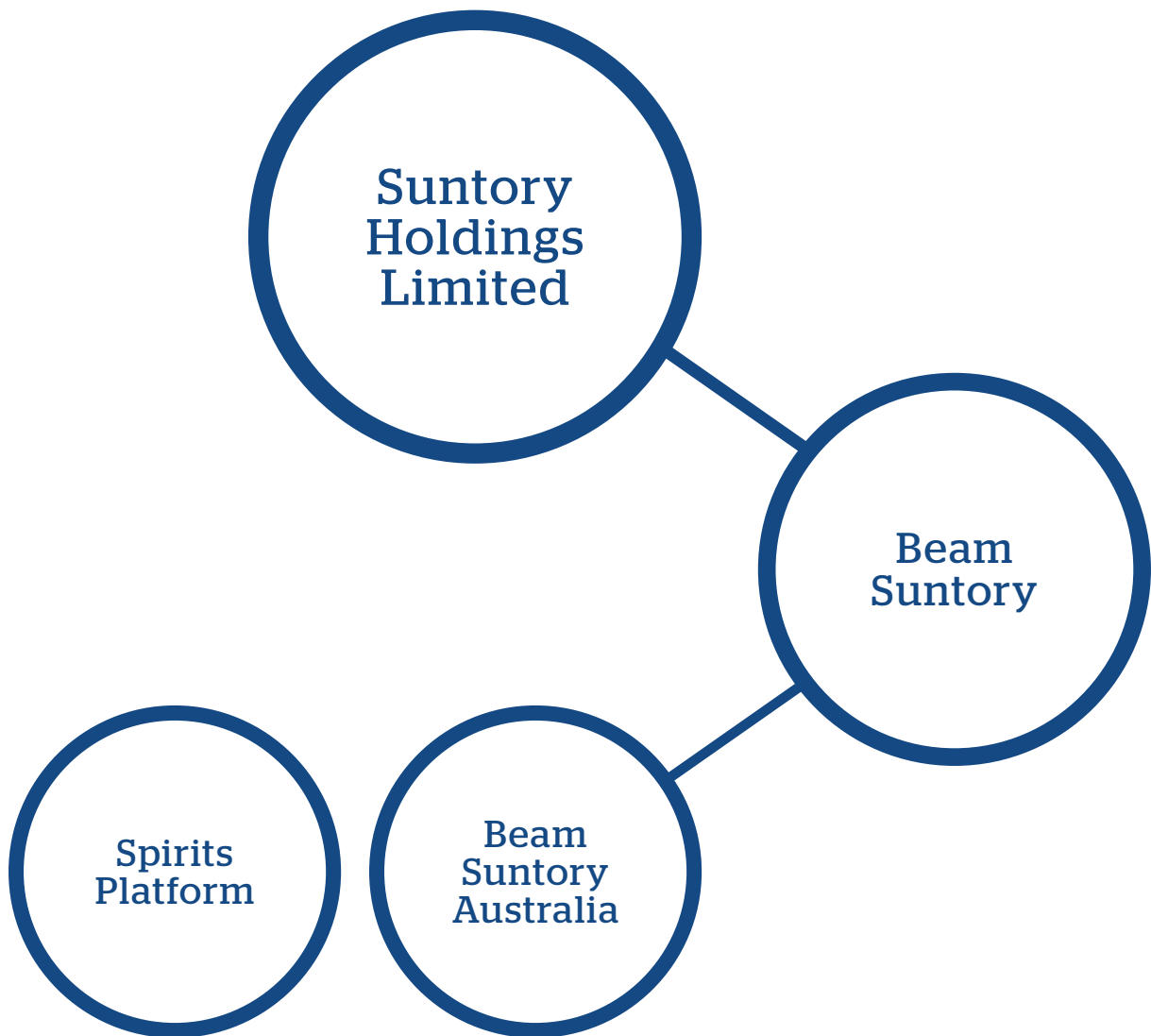
- Multinational group possessing a portfolio of over 70 luxury goods. Only group present in all five major sectors of the luxury market: wine and spirits, fashion and leather goods, perfumes and cosmetics, watches and jewellery and selective retailing.<sup>35</sup>
- Headquarters: Paris, France.

### Moët Hennessy

- Spirit and wine subsidiary of LVMH group.
- Diageo owns 34% of Moët Hennessy.<sup>36</sup> Moët Hennessy Diageo joint ventures are responsible for the importation, marketing and sales of the wines and spirits brands owned by LVMH and Diageo.<sup>37</sup>
- Moët Hennessy Australia financially contributes to DrinkWise.<sup>16</sup>

Brands include:

**Dom Pérignon, Krug, Moët & Chandon, Ruinart, Veuve Clicquot**



### **Suntory Holdings Limited**

- Owns 337 companies across sectors including alcoholic and non-alcoholic beverages, food, restaurants and flowers.<sup>38</sup>
- Headquarters: Tokyo, Japan.

### **Beam Suntory**

- In 2014 Suntory Holdings acquired Beam Inc, to create Beam Suntory.<sup>39</sup> The deal was estimated to be worth \$13.6 billion.<sup>40</sup>
- Third largest premium spirits company in the world.<sup>39</sup>
- Headquarters: Chicago, USA.

### **Beam Suntory Australia**

- Total revenue of \$212.1 million in 2015.<sup>40</sup>
- Financially contributes to DrinkWise.<sup>16</sup>
- Headquarters: Sydney, Australia.

Brands include:

**Canadian Club (includes RTDs – Whisky & Dry, Whisky & Cola, Summer Crisp), Jim Beam Bourbon**

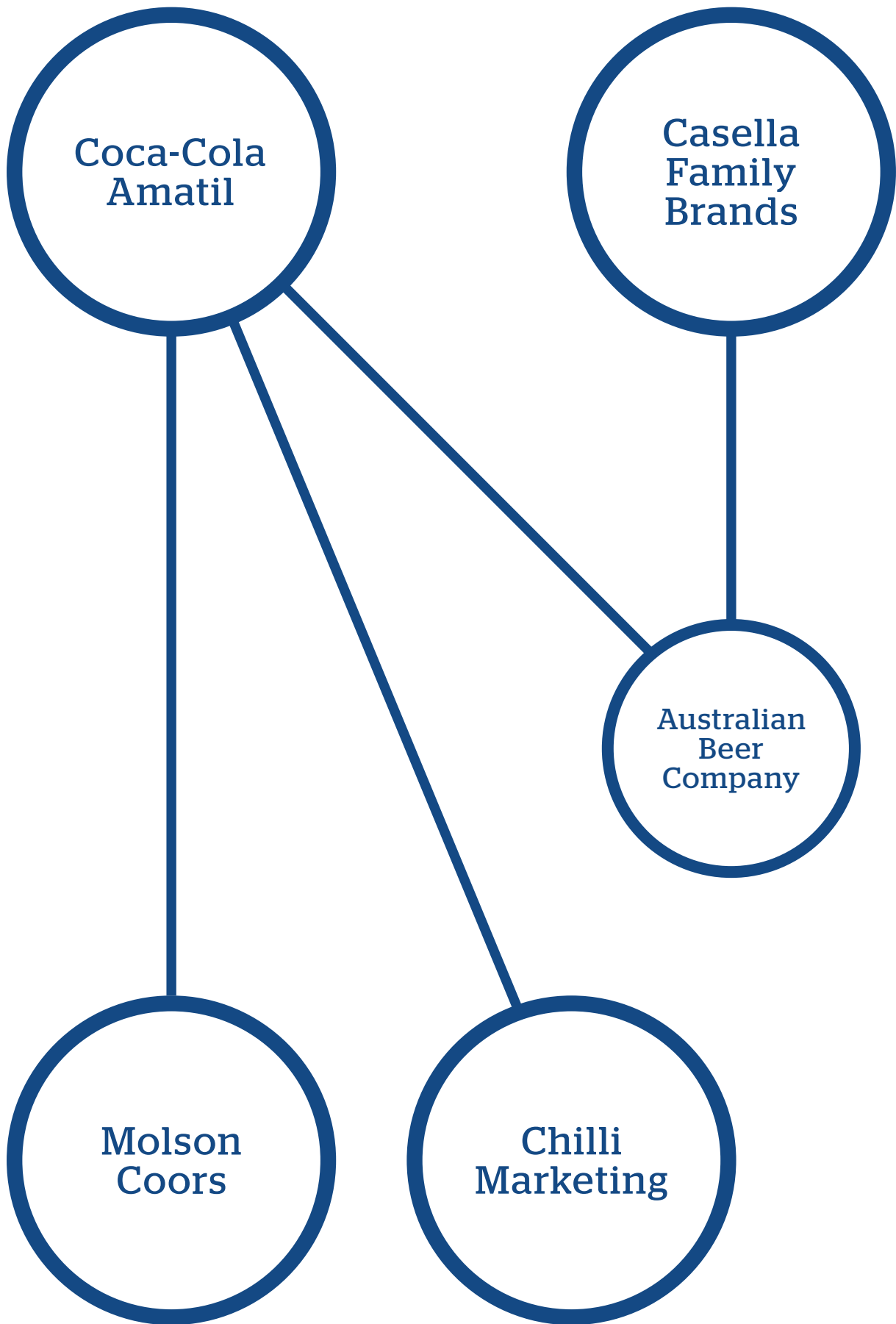
**(includes RTDs – Bourbon & Cola, Bourbon & Zero Sugar Cola, Citrus Highball, Bourbon & Dry, Devils Cut Bourbon & Cola, Bonded & Cola; 5L keg – Bourbon & Cola), Maker's Mark Whiskey, Midori (includes RTDs – Illusion, Burst, Punch, Spice; RTS 2L cask – Midori & Pineapple), Sauza Tequila, Skinnygirl Cocktails (RTS – Cosmopolitan, Margarita), Teacher's Scotch Whiskey, Yamazaki Whiskey**

### **Spirits Platform**

- Australian sales, marketing and distribution company has been established following the merger between Beam and Suntory.<sup>41</sup>
- Headquarters: Sydney, Australia.

Brands managed include:

**Chartreuse, Cointreau, Mount Gay Rum, Opal Nera Sambuca, Remy Martin, Sierra Tequila, St-Remy**



### Coca-Cola Amatil

- Manufactures, distributes and markets alcoholic and non-alcoholic beverages and ready-to-eat snacks.<sup>42</sup>
- Operates across Australia, Indonesia, New Zealand, Fiji, Papua New Guinea and Samoa.<sup>42</sup>
- In 2016 had 15% of the spirit market share in Australia<sup>33</sup> and an estimated 1.5% beer market share.<sup>15</sup>
- In 2011 renewed an agreement with Beam Inc to continue the manufacture, sales and distribution of the Beam premium spirits portfolio in Australia for 10 years.<sup>43</sup> Signed a new 10 year deal in 2015, extending the partnership to 2025.<sup>44</sup>
- In August 2013 announced the establishment of a long-term agreement to distribute the Molson Coors beers in Australia.<sup>45</sup>
- In 2013 signed a joint venture deal with Rekorderlig to be the sole importer and distributor of Rekorderlig Cider in Australia.<sup>46</sup>
- Financially contributes to DrinkWise.<sup>16</sup>
- Foundation member of Alcohol Beverages Australia.<sup>21</sup>
- Headquarters: Sydney, Australia.

Own brands include:

**Pressman's Cider** (brewed by Australian Beer Company), **Yenda beer** (brewed by Australian Beer Company)

Brands distributed include:

**Canadian Club, Coors, Jim Beam, Maker's Mark Whiskey, Midori, Miller, Rekorderlig Cider**

### Molson Coors

- Following the acquisition of SABMiller by AB InBev in 2015, Molson Coors acquired remaining shares of MillerCoors joint venture from SABMiller and became the world's third largest brewer.<sup>47</sup>
- Coca Cola Amatil distribute the Molson Coors beers in Australia.
- Headquarters: Denver, USA.

### Chilli Marketing

- Chilli Australia markets and develops the Rekorderlig Cider brand throughout Australasia.<sup>48</sup>
- Australian headquarters: Sydney.

### Casella Family Brands

- In 2016 had 6.7% of wine market share in Australia.<sup>49</sup>
- Revenue of \$392.5 million in 2015-16.<sup>49</sup>
- Exports over 12.5 million cases of [yellow tail] to more than 50 countries around the world every year.<sup>50</sup>
- Headquarters: Sydney, Australia.

Brands include:

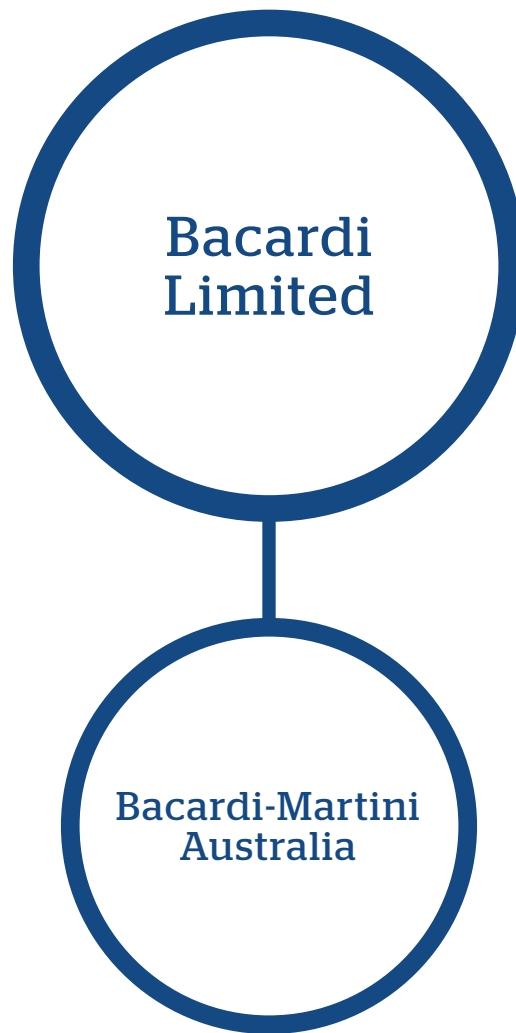
**[yellow tail], Peter Lehmann, Casella**

### Australian Beer Company

- A joint venture between Casella Family Brands and Coca-Cola Amatil launched in 2013 that brews and markets beer and cider.<sup>51</sup>

Brands include:

**Arvo Beer, Yenda Beer, Pressman's Cider**



#### **Bacardi Limited**

- World's largest privately held spirits company.<sup>52</sup>
- Has more than 200 brands and labels sold in more than 160 global markets; operates 29 production facilities in 15 countries.<sup>52</sup>
- Headquarters: Hamilton, Bermuda.

#### **Bacardi-Martini Australia**

- Bacardi-Martini Australia launched on 1 April 2016 following the end of the Bacardi Lion joint venture between Bacardi Limited and Lion.<sup>53</sup>
- It is a 100% owned, standalone subsidiary of the global Bacardi company.<sup>53</sup>
- Estimated spirits market share in Australia of 2.5% in 2016.<sup>33</sup>
- Financially contributes to DrinkWise.<sup>16</sup>
- Headquarters: Sydney, Australia.

Brands include:

**42 Below Vodka (includes Apple Jacks Cider with 42 Below Vodka), Bacardi Rum, Bombay Sapphire Gin, Dewar's Scotch, Eristoff Vodka, Grey Goose Vodka, Magner's Cider, Martini Vermouth, Tequila Cazadores**



## Treasury Wine Estates

### Treasury Wine Estates

- Australian-owned global wine company with over 70 brands sold in more than 70 countries.<sup>54</sup>
- Formerly Foster's wine business, a demerger in 2011 created Treasury Wine Estates.<sup>54</sup>
- Business is focused on four principal regions: Australia and New Zealand, Americas, Asia and Europe.
- Net sales revenue of \$2.232 billion in the 2016 financial year.<sup>55</sup>
- In 2016 had 10.7% of wine market share in Australia.<sup>49</sup>
- Financially contributes to DrinkWise.<sup>16</sup>
- Foundation member of Alcohol Beverages Australia.<sup>21</sup>
- Headquarters: Melbourne, Australia.

Brands include:

**Annie's Lane, Devil's Lair, Fifth Leg, Lindeman's, Penfolds, Rosemount Estate, Wolf Blass, Yellowglen**



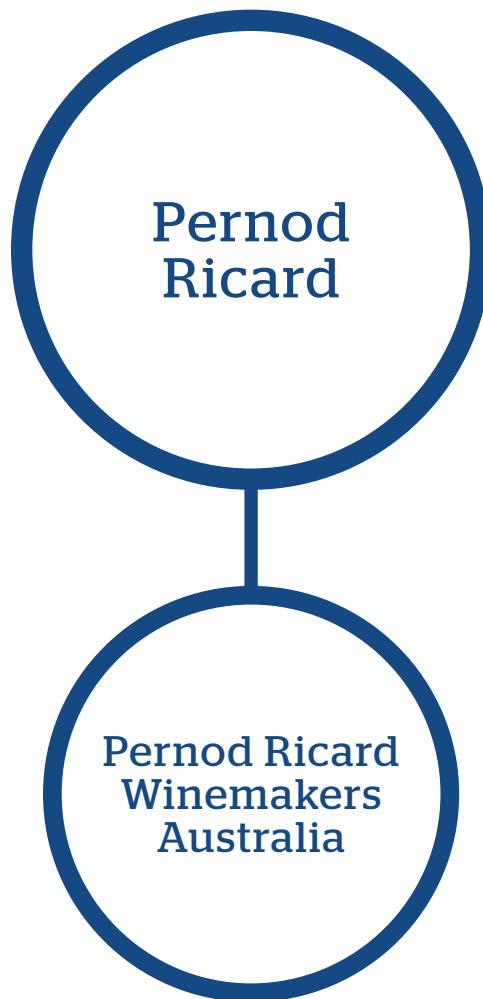
## Australian Vintage Limited

### Australian Vintage Limited

- "Leading Australian wine company".<sup>56</sup>
- Crushes approximately 10% of total Australian annual production.<sup>56</sup>
- In 2016 had an estimated wine market share of 4.4% in Australia.<sup>49</sup>
- Had revenue of \$230.9 million in the 2015 financial year.<sup>57</sup>
- Headquarters: Adelaide, Australia.

Brands include:

**McGuigan Wines, Miranda, Nepenthe, Passion Pop, Tempus Two**



#### **Pernod Ricard**

- Number 2 worldwide in wines and spirits.<sup>58</sup>
- 85 market companies and 101 production sites.<sup>59</sup>
- Reports €8,682million in net sales (no time period given).<sup>58</sup>
- Headquarters: Paris, France.

#### **Pernod Ricard Winemakers Australia**

- Australian subsidiary of Pernod Ricard.
- Revenue of \$537 million in the 2015 financial year.<sup>60</sup>
- In 2016 had 9.4% wine market share in Australia.<sup>49</sup>
- Financially contributes to DrinkWise.<sup>16</sup>
- Foundation member of Alcohol Beverages Australia.<sup>21</sup>
- Headquarters: Sydney, Australia.

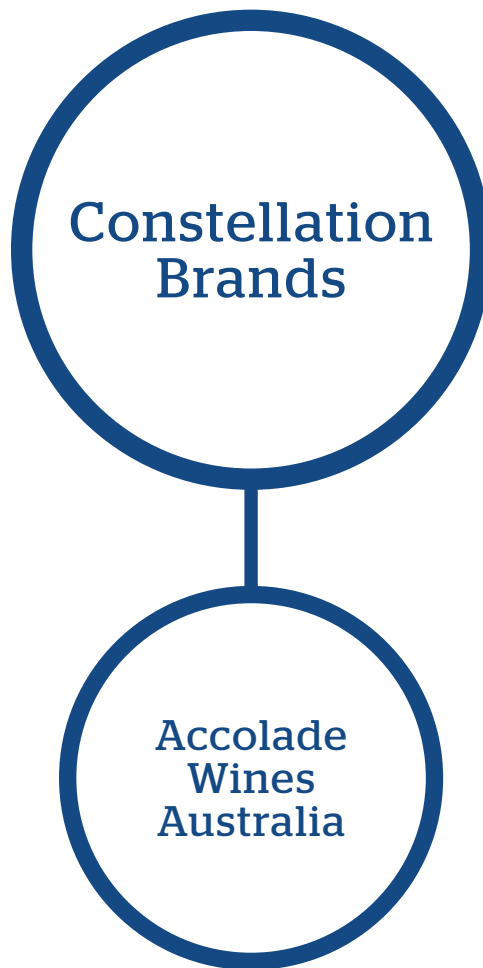
Spirit brands include:

**Absolut Vodka (includes RTDs – Botanik Berry Lime & Vodka, Botanik Berry Pear & Vodka), Beefeater Gin, Chivas Regal, Havana Club, Jameson Irish Whiskey (includes RTDs – Smooth Dry & Lime, Whiskey & Raw Cola, Natural Raw Cola, Whiskey & Cloudy Apple, Whiskey & Ginger Beer), Kahlua, Malibu, Plymouth English Gin**

Wine brands include:

**Carrington, Jacobs Creek, Lawson's, Poets Corner, Richmond Grove, Trilogy, Wyndham Estate**





### Constellation Brands

- "World leader in premium wine, the number one beer importer and the number three beer company in the U.S."<sup>61</sup>
- Has more than 100 brands in its portfolio of wine, beer and spirits, and has operations in approximately 40 facilities.<sup>61</sup>
- Had sales of US\$7,223 million in 2016.<sup>62</sup>
- Headquarters: New York, USA.

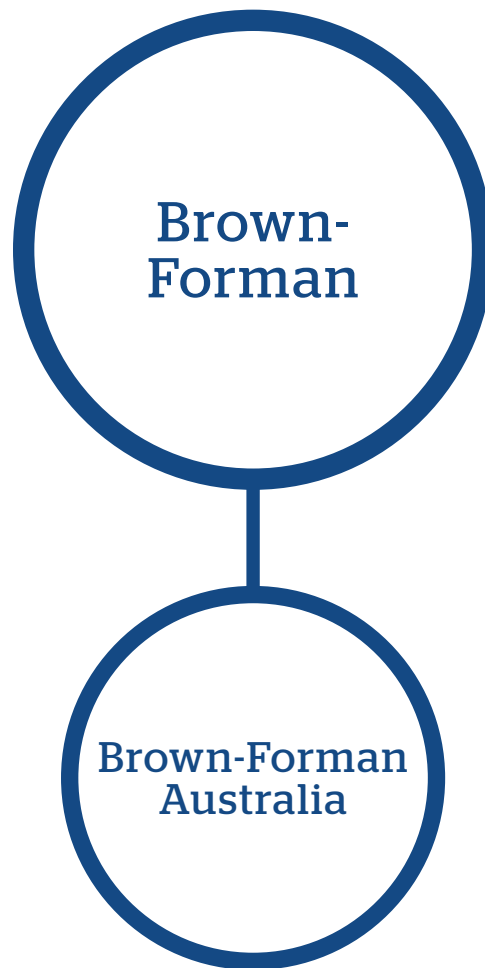
### Accolade Wines Australia

- Formerly Constellation Australia, bought by private equity firm CHAMP in February 2011. Constellation Brands retains 20% interest in the company.<sup>63</sup>
- Number one wine company in Australia and the UK by volume, and the fifth largest wine company in the world.<sup>64</sup>
- Owns 45 brands and delivers approximately 38 million cases of wine to more than 140 countries annually.<sup>64</sup>

- In 2016 had 8.9% wine market share in Australia.<sup>49</sup>
- In 2016 generated total revenue of \$553.2 million.<sup>63</sup>
- Financially contributes to DrinkWise.<sup>16</sup>
- Foundation member of Alcohol Beverages Australia.<sup>21</sup>
- Headquarters: Adelaide, Australia.

Brands include:

**Banrock station (produces 2L casks, including 'Infusions' range – Rosé infused with Strawberry & Lychee and Sauvignon Blanc infused with Peach & Mango), Berri Estates (produces 5L casks), Hardys (produces 3L and 10L casks), Houghton (produces 2L casks), Omni, Stanley Wines (produces 2L and 4L casks)**



#### **Brown-Forman**

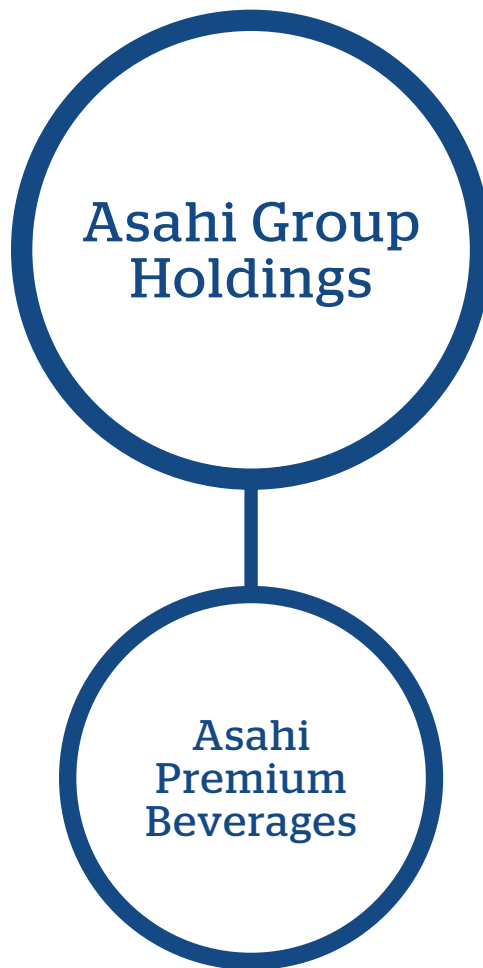
- Among the top 10 largest global spirits companies.
- Sells its products in around 160 countries.<sup>65</sup>
- Has offices in Asia, Africa, Australia, Europe, Middle East, North America and South America.
- In 2016 made US\$2,144 million in gross profit.<sup>65</sup>
- Headquarters: Kentucky, USA.

#### **Brown-Forman Australia**

- Generated total revenue of \$213.3 million in 2016.<sup>66</sup>
- Financially contributes to DrinkWise.<sup>16</sup>
- Foundation member of Alcohol Beverages Australia.<sup>21</sup>
- Headquarters: Sydney, Australia.

Brands include:

**El Jimador Tequila, Finlandia Vodka, Herradura Tequila, Jack Daniel's (includes RTDs – Whiskey & Cola, Whiskey & Zero Sugar Cola, Whiskey & Lemonade, Whiskey & Dry, American Serve & Cola), Jagermeister, Old Forester, Woodford Reserve Bourbon**



### Asahi Group Holdings

- Global beer, spirits, soft drinks and food company.
- Acquired SABMiller plc's beer business in Europe following the SABMiller acquisition by AB InBev.<sup>11</sup>
- Headquarters: Tokyo, Japan.

### Asahi Premium Beverages

- Formerly Independent Distillers, acquired by Asahi Group Holdings in 2011.<sup>67</sup>
- In 2016 had 14.9% of RTD mixed spirit production market share<sup>34</sup> and 12.8% spirit market share in Australia.<sup>33</sup>
- Financially contributes to DrinkWise.<sup>16</sup>
- Foundation member of Alcohol Beverages Australia.<sup>21</sup>
- Headquarters: Melbourne, Australia.

Ready-to-drink products include:

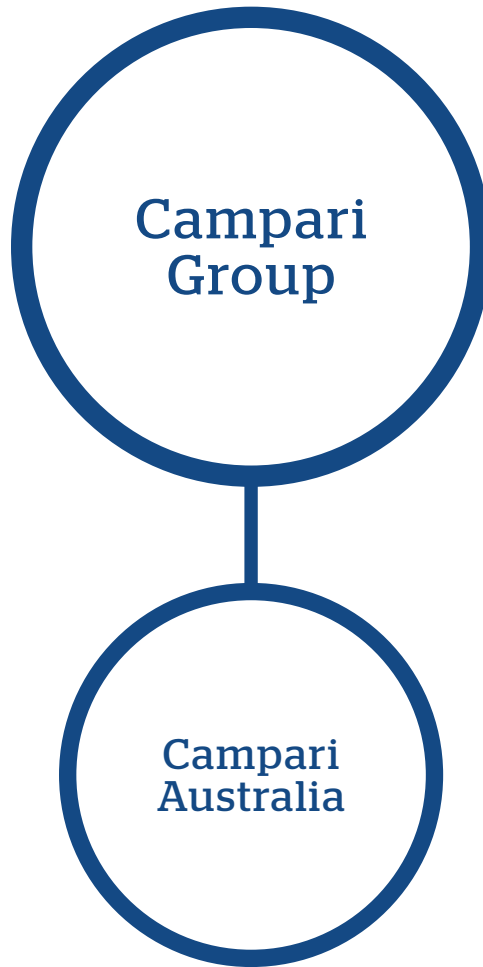
**Highland Scotch RTD, Red Bear RTD, Rhythm RTD, Vodka Cruiser RTDs (Lush Guava, Pure Pineapple, Zesty Lemon-Lime, Wild Raspberry, Juicy Watermelon, Bold Berry Blend, Ripe Strawberry, Sunny Orange & Passionfruit, Black Raspberry, Black Lemon Lime & Bitters, Black Citrus, Black Ice, Sugar Free Citrus Blend, Sugar Free Mixed Berry, Sugar Free Peach & Mango, Sugar Free Pomegranate & Guava, Mudshake Chocolate, Mudshake Original CS Cowboy, Mudshake Espresso Martini), Wild Moose RTD, Woodstock Bourbon RTD**

Beer and cider brands include:

**Asahi beer, Cricketers Arms, Estrella Damm, Kingfisher, Mountain Goat, NZ Pure, Somersby Cider** (distributed on behalf of Carlsberg Group)

Spirit brands include:

**Nikka Whisky, Woodstock Bourbon**



### Campari Group

- Ranked sixth in the global beverage industry.<sup>68</sup>
- Owns 16 manufacturing plants worldwide, and has over 50 brands marketed and distributed in over 190 countries.<sup>68</sup>
- Had sales of € 1,726.5 million and group net profit of €198.6 million in 2016.<sup>69</sup>
- Headquarters: Milan, Italy.

### Campari Australia

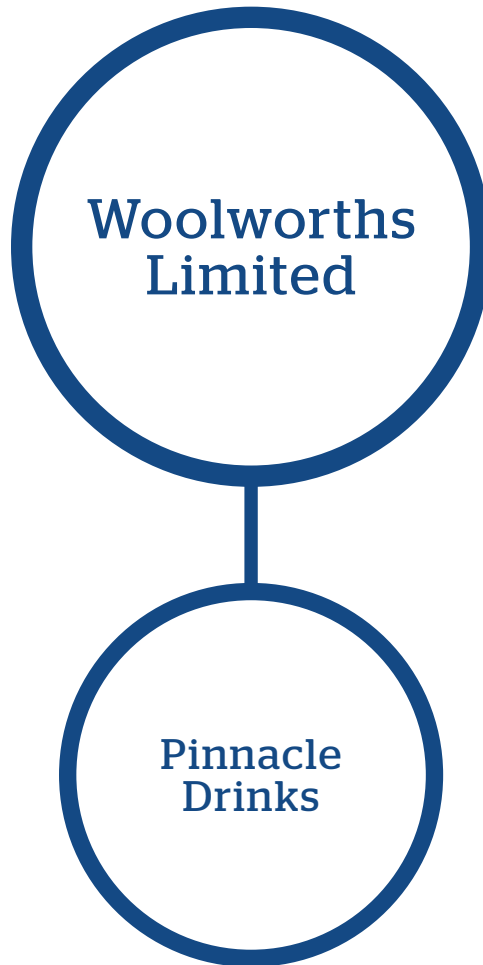
- Estimated spirit market share of 4.5%<sup>33</sup> and estimated RTD mixed spirit market share of 4% in 2016.<sup>34</sup>
- Asia Pacific headquarters: Sydney, Australia.

Spirit brands include:

**Aperol, Appleton Estate Rum, Campari, Cabo Wabo Tequila, Grand Mariner, Frangelico, Skyy Vodka (includes RTDs – Fused Soda & Squeezed Lime, Homestyle Lemonade & Bitters), Wild Turkey Whiskey (includes RTDs – Bourbon & Cola, Bourbon & Dry), Wild Turkey American Honey Liqueur (includes RTDs – Honey Liqueur & Cola, Honey Liqueur & Dry, Dry Ginger & Lime)**

Wine brands include:

**Cinzano, Mondoro, Riccadonna, Sella & Mosca**



### Woolworths Limited

- Publicly listed Australian company that covers food and grocery, liquor, tobacco, petrol, general merchandise and hotels.
- Headquarters: Sydney, Australia.

See 'Major Alcohol Sales Outlets' guide for further detail on Woolworths Limited and its subsidiaries.

### Pinnacle Drinks

- Established in 2012, manages its own exclusive brands on behalf of Endeavour Drinks Group (formerly Woolworths Liquor), the liquor business of Woolworths Limited.<sup>70</sup>
- Partners with winemakers, growers, brewers and distillers to exclusively supply wine, beer and spirit brands to BWS, Dan Murphy's and ALH Group.<sup>70</sup>
- Headquarters: Sydney, Australia

Beer and cider brands include:

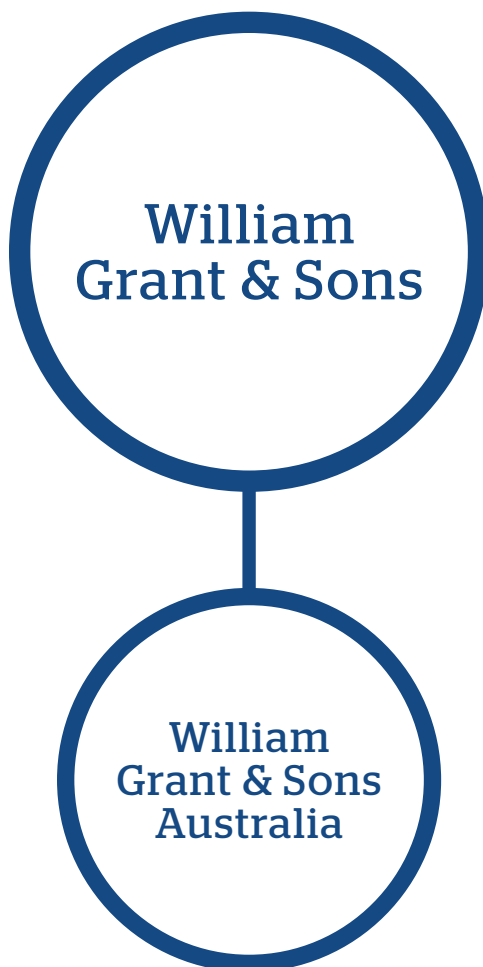
**Bolt, Castaway, Dry Dock, Platinum Blonde, Sail and Anchor**

Spirit and RTD brands include:

**Finnlaigh Irish Whiskey, McAllister Scotch Whiskey, Mishka Vodka (includes RTDs – Vodka Lemon Twist, Vodka Apple & Lychee, Vodka Raspberry Splash, Vodka Pineapple Crush, Vodka Lemon Lime & Bitters, Vodka Luscious Berry, Vodka Tangy Orange, Vodka Hot Pink, Vodka Guava Tropics, Sugar Free Guava, Sugar Free Tropical), Tequila 125**

Over 75 wine brands, including:

**Bay Estates, Cat Amongst the Pigeons, Cow Bombie, Five Sounds, Marlborough Sounds, South Island, Twelve Degrees, Wattle Villa**



**William Grant & Sons**

- Family owned premium spirits company.
- Worldwide network of offices that manages the production, sales, marketing and distribution of brands in 180 markets.<sup>71</sup>
- Headquarters: Scotland, UK.

**William Grant & Sons Australia**

- Wholly owned subsidiary of William Grant & Sons formed in 2011 to manage and distribute products.<sup>72</sup>
- Headquarters: Sydney, Australia.

Brands include:

**Glenfiddich Scotch Whiskey, Grant's Scotch, Hendricks Gin, Sailor Jerry Spiced Rum, The Balvenie, Tullamore Irish Whiskey**



### **Vok Beverages**

- Established in 2002 as an independently owned and operated alcohol company; sister company to Bickford's Australia.<sup>73</sup>
- In 2016 had an estimated RTD mixed spirit market share of 3% in Australia.<sup>34</sup>
- Headquarters: Adelaide, Australia.

Cider brands include:

**Three Oaks Cider**

Ready-to-Drink products include:

**Bearded Lady Bourbon & Cola, Hi NRG Vodka & Energy pre-mix, Infused Rush Vodka, Kilt Scotch & Cola, Real McCoy Bourbon & Cola**

Ready-to-Serve products include:

**Vok 2L cocktails in a cask (Piña Colada, Lime Mojito),  
Vok Liqueurs**

Spirit brands include:

**Bearded Lady Bourbon, Beenleigh Rum, Black Bottle Brandy, El Toro, Vicker's London Dry Gin**

Wine brands include:

**Beacon Hill, Beresford, Crystal Brook, Half Mile Creek, Trig Point**



#### **Sazerac Co**

- Independent, American family owned company.<sup>74</sup>
- Headquarters: Louisiana, USA.

#### **SouthTrade International**

- Premium spirits importer<sup>75</sup> and sales and marketing company.<sup>76</sup>
- Acquired by Sazerac Co in 2016; previously controlled by Pinnacle Drinks, the exclusive brands subsidiary of Endeavour Drinks Group (formerly Woolworths Liquor).<sup>77</sup>
- Headquarters: Sydney, NSW.

Brands include:

**Agwa De Bolivia (herbal energy liqueur), Fireball Whiskey, Gran Patron, Green Fairy Absinth, Hayman's gin, Limoncello, Patron Tequila, Sazerac American Whiskey, Southern Comfort Whiskey (includes RTDs – Southern Comfort & Cola, Southern Comfort & Lemonade), Ultimat Vodka**





## Gage Roads Brewing Co

### Gage Roads Brewing Co

- In 2009 Woolworths Limited acquired a 25% stake in Gage Roads and contracted them to brew Woolworths private-label beer products.<sup>15</sup>
- In October 2016, Gage Roads bought back all of Woolworths shares and is now an independent company.<sup>78</sup>
- Had revenue of \$25.5 million in the 2016 financial year.<sup>79</sup>
- In 2016 had estimated beer market share of less than 0.5% in Australia.<sup>15</sup>
- Headquarters: Perth, Australia.

Brands include:

**Little Dove Pale Ale, Narrow Neck Session Ale, Single Fin Summer Ale, Sleeping Giant IPA, Small Batch Lager**



## Onebeve

### Onebeve

- Global beverage producer specializing in the manufacturing, distribution, sales and marketing of spirit, wine, liqueur, beer, cider and ready-to-drink products.<sup>80</sup>
- Offices in New York, USA and Melbourne, Australia.

Brands include:

**Black Barrel Bourbon Whiskey (includes RTDs – Bourbon & Cola), Creative Cowboy Cream Liqueur, Creative Double Shots (25mL shots available in 4 or 6 packs, and a shot bucket – flavours include Cowboy, Jam Donut, QF Shooter, Slippery Buca, B52, Berry Swirl), Creative Premium Cowboy Cream (available in 700mL, 750mL, 1 litre bottles and 2 litre casks – Salted Caramel, Espresso Macchiato), Elevate RTD energy drink, Shakem Premium Smoothie (available in 700mL bottles and 2 litre casks – Classic Cream, Butterscotch, Chocolate, Strawberry, Tropical, Exotic Berry), Vodka Sinsation RTD (Iron Brew, Arctic Blue, Raspberry, Pineapple, Cloudy Apple, Passionfruit, Pink Blush)**



**island2island Beverage Company**

- Formed in 2007 to be the importing, sales, marketing and distribution agency for Angostura bitters.<sup>81</sup>
- Headquarters: Sydney, Australia.

Brands include:

**Amarula Cream Liqueur, Angostura Rum, Bushmills Irish Whiskey, Broker's London Dry Gin, GlenDronach Scotch Whiskey, Jose Cuervo tequila, Kraken Black Spiced Rum, San Miguel Beer, Stolichnaya Vodka**



**ASM Liquor**

- Previously distributed by Beam Suntory, ASM Liquor began selling and distributing their products in September 2015.
- Vodka O is the third bestselling vodka in Australia.<sup>82</sup>
- Headquarters: Melbourne, Australia.

Brands include:

**Moss Creek Moonshine & Cola RTD, Tequila Blu, VDKA 6100, Vodka O (includes RTDs – Strawberry, Cranberry & a Hint of Basil; Pear with a Hint of Vanilla; Pineapple, Cucumber & Mint; and Apple, Ginger & Spice)**

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