Packaged liquor market overview

Year ending November 2006

Packaged Liquor

- All major liquor categories are growing, increasing by a combined $394 million in retail sales
- There is a general move towards premium products in beer, spirits and ready to drinks
- The key growth states are Western Australia and Queensland, contributing 77 percent of the value growth

Wine

- The wine category is growing at 0.5 percent ($13.8 million) for the MAT to November 2006
- Wine remains the second largest category in packaged liquor
- White wine and sparkling segments are in healthy growth
- Cask wine is in significant decline

Packaged Beer

- Packaged beer market is now worth $4.46 billion
- Premium beer remains the fastest growing segment contributing a further $81.2 million to its sales last year
- Mid strength beer's growth rate is accelerating significantly in 2006 while light beer continues to decline

Ready To Drinks (RTDs)

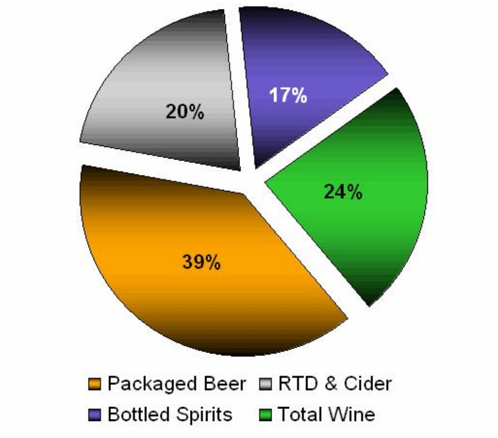
- RTDs is the fastest growing category at 7.5 percent per annum
- Bourbon RTDs account for almost one in every 10 dollars spent in the off premise market
- Dark RTDs account for ¾ of the growth of the RTD category

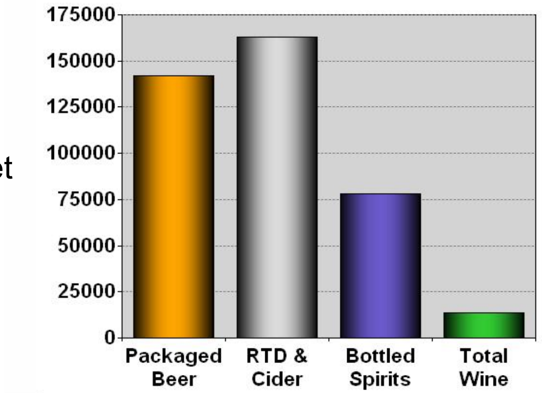
Spirits

- The spirits category is growing at 4.5 percent and represents 16.7 percent of the packaged liquor market
- Scotch is the biggest segment with 27.8 percent of total spirit sales
- Bourbon contributed $31.9 million in incremental retail sales on last year

Packaged Liquor

Australia, category % share and growth in retail value ($000), MAT November 2006





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