

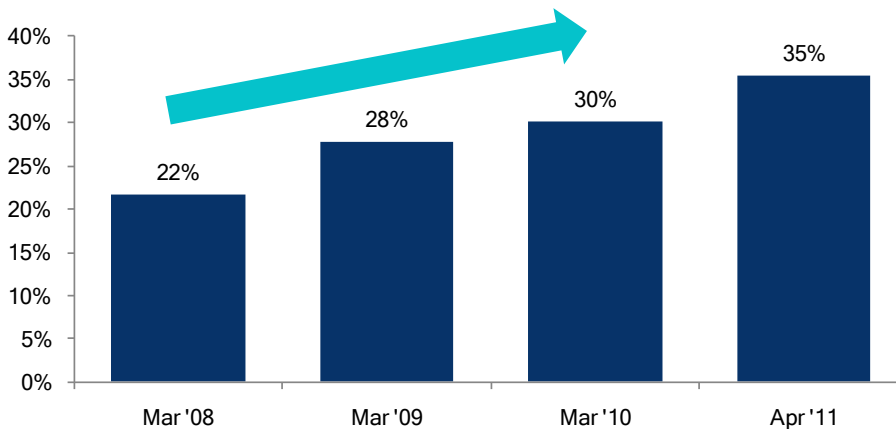
Consumers are spending more on wine BUT more of them perceive it to be an expensive drink

Mean spend per bottle in the off-trade	Mar '08	Mar '09	Mar '10	Apr '11
For an informal meal at home	£4.59	£4.70	£4.90	£5.11 ↑
For a more formal dinner party at home	£5.93	£6.15	£6.29	£6.43 ↑

Source: Wine Intelligence Vinitrac® UK Mar '08 to Apr '11, n= 1,000+ UK regular wine drinkers per wave

Generally speaking, wine is an expensive drink

% who agree or agree strongly with the statement

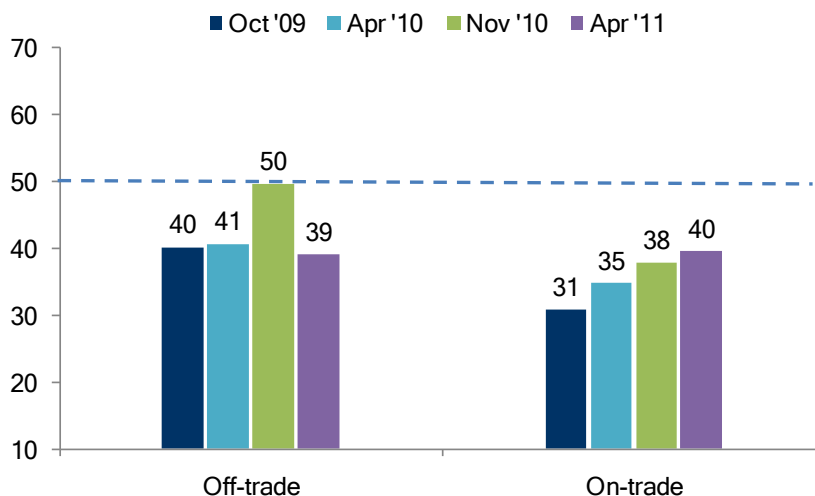


Source: Wine Intelligence, Vinitrac® UK, Mar '08 to Apr '11, n=1,000+ UK regular wine drinkers per wave

Consumer spending confidence has fallen in the off-trade as govt spending cuts begin to bite

Consumer wine spending confidence index: Next 4 weeks

- Index of over 50 = net consumer spend increasing
- Index of 50 = consumer spend on wine static
- Index of less than 50 = net consumer spend decreasing



Source: Wine Intelligence Vinitrac® UK Oct '09 to Apr '11; n=500+ UK regular wine drinkers per wave

Latest usage trends for different wines among UK regular wine drinkers: Where will the next driver of growth for wine come from?

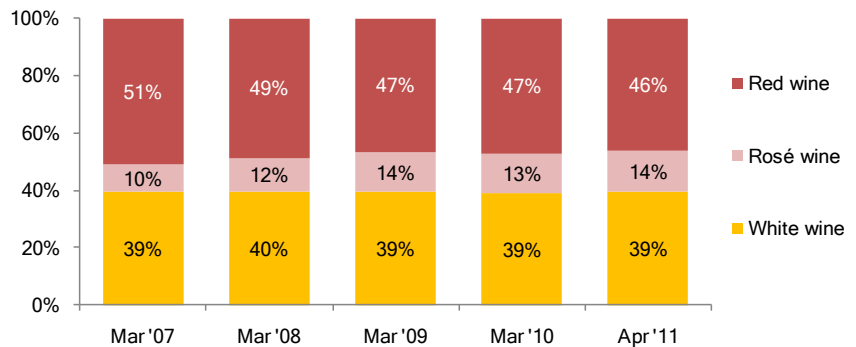
- Pinot Grigio's steady climb appears to have halted**
 - Usage of PG has settled at 55%, after reaching 60% in Mar '10
 - Chardonnay remains the most widely drunk white varietal, with Sauv Blanc just ahead of PG
- Prosecco's remarkable surge has also slowed and possibly reached its peak for now**
 - 17% usage in Apr '11 = with Mar '10
- Usage of wines from Australia and France continue to slide. California usage also down on recent years**
 - But Australia still leads with 59% usage among UK regular wine drinkers (was 73% in '08)
- With many new brands available, Marlborough has experienced a rise in awareness and usage**
 - Awareness up to 33% (18% in '08)
 - Usage up to 10% (6% in '08)

Source: Wine Intelligence Vinitrac® UK Mar '08 to Apr '11, n= 1,000+ UK regular wine drinkers per wave

Rosé wine consumption: Has the ceiling been reached?

- Rosé's proportion of still light wine consumption appears to have settled at just under 15%
- At the same time, the percentage of consumers who drink rosé wine has fallen back from last year's peak (Apr '11=55% vs 60% Mar '10)

Proportions of red, white and rosé wine



Source: Wine Intelligence, Vinitrac® UK, Mar '07 to Apr '11, n=1,000+ UK regular wine drinkers per wave

What is the size of the UK regular wine drinking population?

48.8* million adults in UK

↓ **81%** Still light wine drinking penetration among UK adults

39.4 million still wine drinkers

↓ **58%** of UK adults drink still light wine at least once/month

28.4 million regular still light wine drinkers

Sources: *ONS Mid-2009; Wine Intelligence Calibration Study, Sep'10

For more details about Wine Intelligence research in the UK and other markets please contact us directly or visit our website:

www.wineintelligence.com