



WITS

WINE INDUSTRY
TECHNOLOGY
SYMPOSIUM

Technology Leadership: Business Intelligence

Panelists:

Heather Crawford – Director Business Intelligence, Fosters Wine Estates

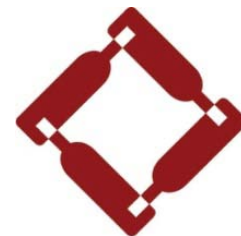
Mark Tobin - Director of Business Intelligence, Chateau Ste. Michelle

Sue Tamburelli - Manager of Sales Operations, Francis Ford Coppola

Moderator:

Herbert Klein - Industry Lead Consumer Products, Oracle

July 16-17, 2009 Napa Valley Marriott



WITS

A GREAT INTERNATIONAL DRINKS COMPANY



7000

people

48

sites

238

products

117m

cases of beer
(9L equivalent)

38.7m

cases of wine
(9L equivalent)

\$4,372m

net sales revenue

23

wineries

27

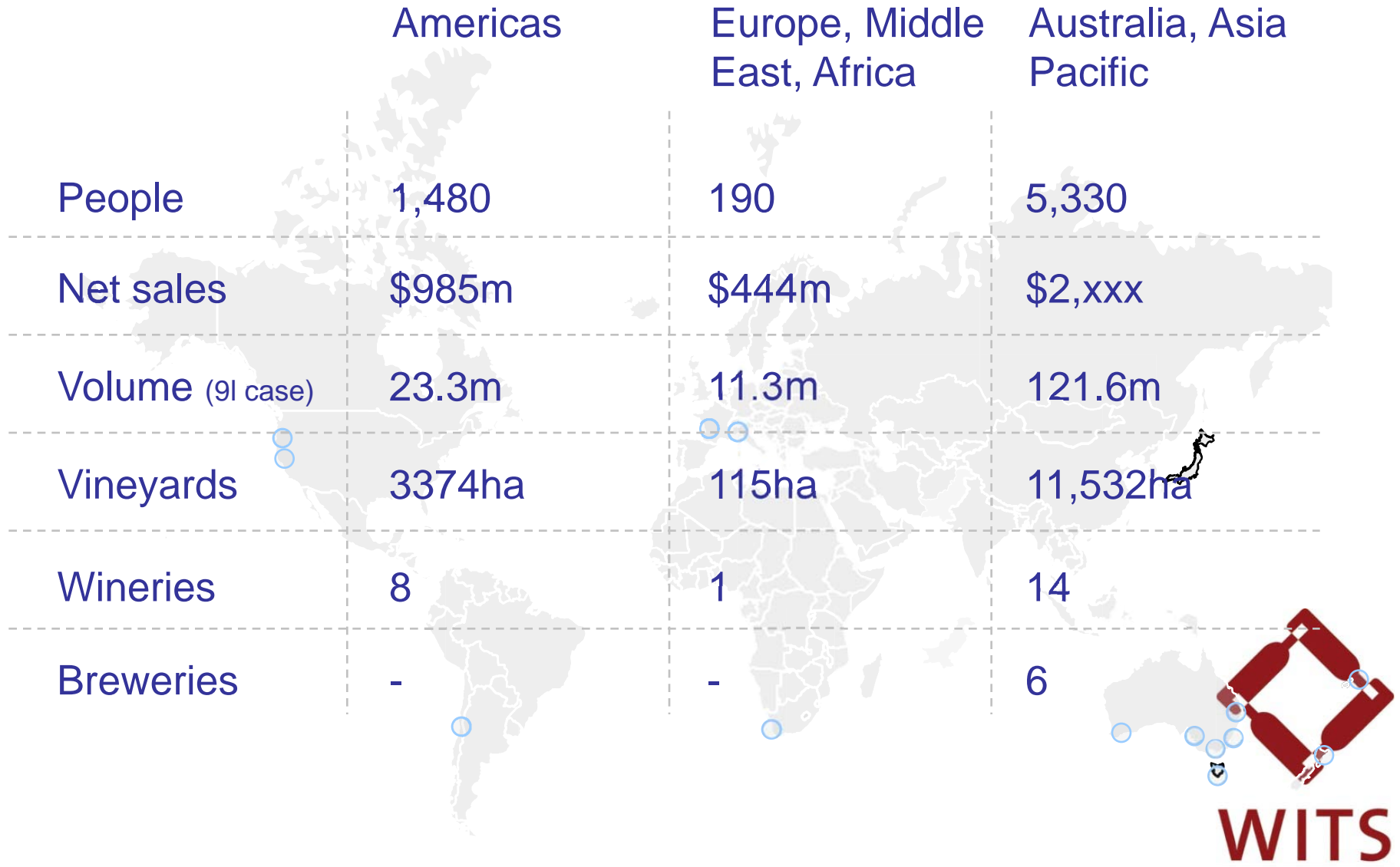
wine regions

15,021 ha

vineyard holdings

WITS

STRONG REGIONAL BUSINESSES

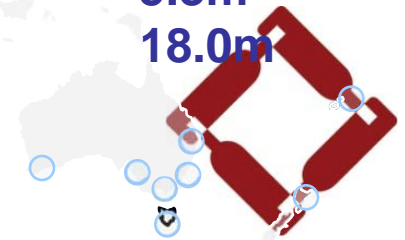


STRONG REGIONAL BUSINESSES

AMERICAS



People	1,480
Regional HQ	Napa
Wineries	8
Vineyard Holdings	3374(ha)
Net Sales Revenue	\$984.6m
- Beer, Cider & Spirits	6.3m
- Wine	978.3m
Volume (9 litre cases)	23.3m
- Beer, Cider & Spirits	5.3m
- Wine	18.0m



WITS

A LEADING BRAND PORTFOLIO 238

Individual products across international and regional beer, wine, spirits and non-alcohol brands



Penfolds®



F
FOSTER'S



B
BERINGER
SINCE 1876



VB



L
EST 1842
LINDEMANS®



Crown
LAGER



**CARLTON
DRAUGHT**
BREWERY
SINCE 1850



WOLF BLASS®



ROSEMOUNT
Premium Cellars, Australia



CASTELLO di
GABBIANO



Stag's Leap



**MATUA
VALLEY**



**PURE
BLONDE**



**WYNN'S
COONAWARRA ESTATE**



CASCADE
WITTS

A RICH AND DIVERSE HISTORY

1843: Lindemans established in the Hunter Valley

1844: Penfold's Wines established by Dr Cristopher Rawson Penfold in Adelaide

1854: Victoria Bitter first brewed in East Melbourne

1876: Beringer Brothers Winery established in California's Napa Valley

1876: Mildara Wines began in Sunraysia

1888: Foster's Lager first brewed in Sydney Australia

1907: Foster's amalgamates with five other breweries to create Carlton and United Breweries

1919: Crown Lager first brewed for Australian diplomatic corps.

1966: Wolf Blass winery established in Australia's Barossa

1971: Yellowglen vineyard established

1974: Chateau StJean founded in Sonoma County, California

1975: St Clement vineyards established in Napa Valley, California

1975: Carlton and United Breweries acquires Tooth & Co in Sydney

1985: Penfolds Wine Group acquires Wynns, Seaview, Killawarra

1991: Mildara Blass created

1991: Penfolds Wines renamed Southcorp Limited

1996: Foster's enters wine through Mildara Blass acquisition

2000: Foster's acquires Beringer Wine Estates

2005: Foster's acquires Southcorp Limited



Company Overview -



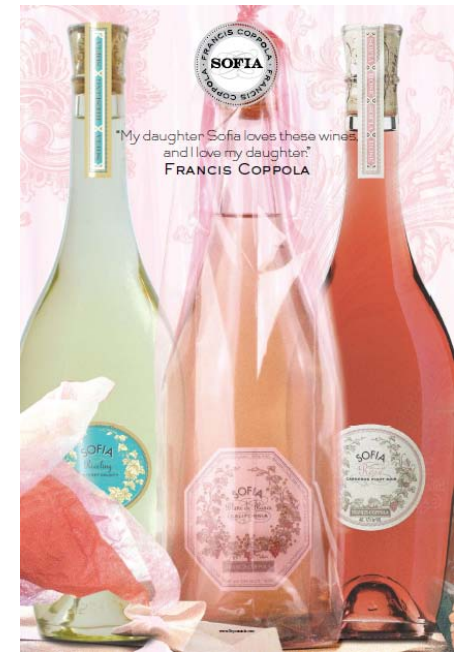
- An Altria company
- Founded in 1934
- Headquartered in Woodinville, WA
- Producers of Chateau Ste. Michelle, Columbia Crest, Domaine Ste. Michelle, Red Diamond, Villa Mt Eden, Stag's Leap Wine Cellars and others
- Partnerships with Antinori , Haras De Pirque, Nicolas Feuillatte, Ernst Loosen
- Over 6M cases in 2008; approx 900 employees





Company Overview: Francis Ford Coppola Presents

- Privately Held: Headquarters located in Napa
- Winery located in Geyserville, CA
- **Our Wines:**
 - Coppola Diamond Collection
 - Rosso & Bianco
 - Sofia
 - Director's
 - Director's Cut
 - Votre Santé
 - FC Reserve Wines

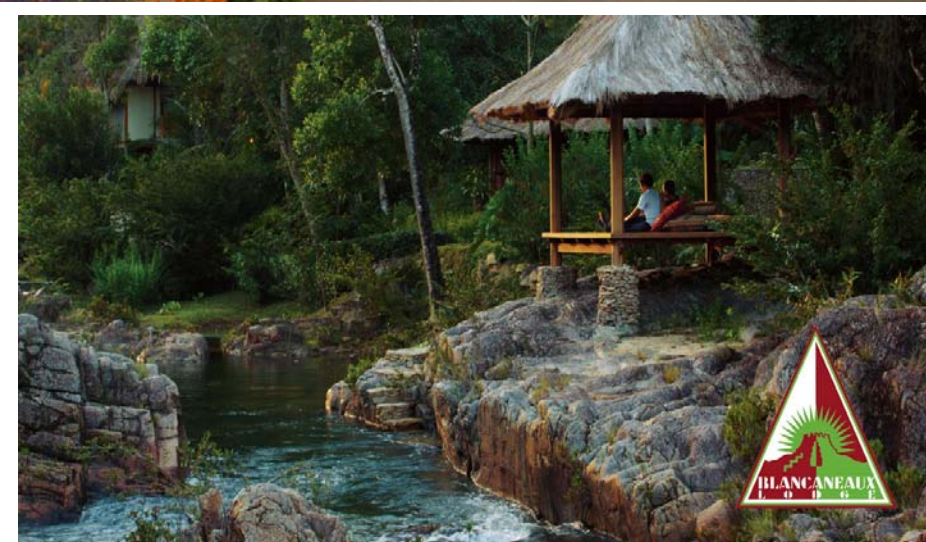




WINE

FOOD

ADVENTURE



Business Intelligence – What is it?

“Business Intelligence (BI) refers to skills, technologies, applications and practices used to help a business acquire a better understanding of its commercial context”


Business intelligence often aims to support better decision making:

- Improved consumer insights that can be leveraged to profitably meet consumer needs
- Improved category and customer insights that can be used to improve in-store performance
- Operational insights in areas of procurement, logistics, manufacturing and asset management.



WITS

Key Industry Drivers Impacting BI

- Exponential increase in availability of internal & external data 
- Customers & Consumers have better information & analytics
- New, low cost consumer communications yield valuable information about preferences, buying & consumption behavior
- Tough global economy – need to spend marketing & promotion dollars smarter
- Shifting consumer trends – growth of both premium & value
- Requirements from the business to not just predict demand but to shape and influence it.