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

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.

SYSTEMBOLAGET

2014 Launch plan

We believe that one way of consolidating our customer promise is to ensure that we create different offerings for different customers – by tailoring our offerings to customers' individual and differing requirements. Our new product range model will be implemented in full by January 2014, and although we did distribute new products in line with the new model in last year's launch plan, it is only now that the stores are being fully modified. A process from which we will undoubtedly learn a great deal and which will give us insights we currently lack.

In the wake of our first launches we immediately notised that the differences between standard and premium requirements are, in some cases, slightly less than we thought one year ago when we adopted the new distribution model. We have consequently slightly upped the number of standard requirement launches at store levels C and D in this year's plan.

It is also already apparent that there are differences in people's preferences with regard to brand and item design between the standard and premium requirements. This is an area we rarely address in our requests for tender. Threrefore we'd like you, as suppliers, to think about the kind of customers at whom your launch will be aimed. That is try and tailor your product to the customer in a way that will generate maximum possible customer benefit. The category managers are happy to act as sounding boards if you have any questions about upcoming launches. Give us a call or send us an e-mail if you have any queries or concerns in this respect. We will be focusing particularly strongly on organic wine in 2014 in the form of, amongst other things, ten boxed wine launches. We have also increased the total number of boxes launched during the year in order to ensure that we are still able to offer openings for non-organic wines. We also expect the stores' local ranges to offer an additional routine into the product range.

There are numerous factors that will potentially influence our launch decision-making process in future and we will consequently continue to publish two launch plans per year. Most of the launches scheduled for the autumn of 2014 are hence not, as yet, included in this plan.

Another way of improving our customer promise is the ability to launch complementary items, allowing us to bring in new sizes and packaging types as a complement to an item already included the fixed range. The advantage of this approach is that it enables the immediate distribution of a complementary item, rather than – as was previously the case – assigning it to T9 with no guarantee of shelf space. The choice of complementary items is based entirely on the regular item's points total. The tenders are, in other words, not reviewed: we let customer preference have the casting vote. The customers have already shown that they like the product, and even the "best" tender samples in the world can't compete with that simple fact.

The complementary item process will primarily be applied with regard to items that meet our strategic goals, e.g. smaller sizes, eco-friendly packaging, and organic and fair trade products. We will, of course, always demand that the content is exactly the same in both items, but when it comes to the packaging, the scope for complementary versions is substantial.

The vast majority of what you will see in this launch plan will, nonetheless, be familiar to you. It is a versatile mixture of high and low price items, everyday and special occasion offerings, the new and the familiar and, in many cases, products with an extra dose of consideration and responsibility. Quite simply, it is a collection of launches that our mutual customers will not only enjoy but also view as a customer promise kept.

The Category Managers, pp.

Ulf Sjödin MW

Trends and the world in which we operate

Systembolaget monitors its operating environment continuously in order to ensure our ability to adapt our product range in line with prevailing trends and changes in customer demand. We monitor not only changes in consumer behaviour and trends in the retail sector, but also more overall trends and the driving forces behind them. The starting point for this work is, of course, the macro trends, i.e. the overall changes taking place in society in a variety of areas, such as demographics, technology, geography and the economy. These forces affect trends which, in turn, give rise to changes in consumer behaviour. Several of the trends we have detected are interlinked and mutually reinforcing and should, therefore, be viewed as a whole, rather than as individual phenomena.

Comparisons with last year show that several of this year's trends are a continuation of previous years' trends. A couple of them have strengthened, while others have weakened. As in previous years, we have focused on driving forces and trends that affect Sweden and her population, even if several of them do also impact other parts of the world.

Macro trends

Demographics

We are continuing to see a successive change in the population structure and typical family composition:

- The population of Sweden is ageing, the average lifespan has extended and is now just under 84 years for women and almost 80 for men, and as a result, there are now just over 1.8 million Swedes over the age of 65.
- There are 1.9 million people under the age of 18.
- Seven out of every ten of our 1.1 million families with children are "nuclear families" (i.e. the children are all the joint offspring of both parents), but the number is gradually declining.
- 47 per cent of households are single-person households, which is a far higher percentage than in most other countries.

Geography

We live in an increasingly global economy in which information, capital, goods, services and people move more quickly and easily from one country to another. The result of this globalisation is that things that happen outside our national boundaries, whether they involve economic fluctuations, news, competition or various forms of entertainment, impact us more quickly than before. We are seeing a simultaneous and relatively rapid relocation by people from rural areas to urban ones. Sweden is, according to Eurostat, the fastest urbanising country within the EU. Awareness of global warming has increased and is resulting in new consumer demands on the ways in which companies produce, package and transport their goods.

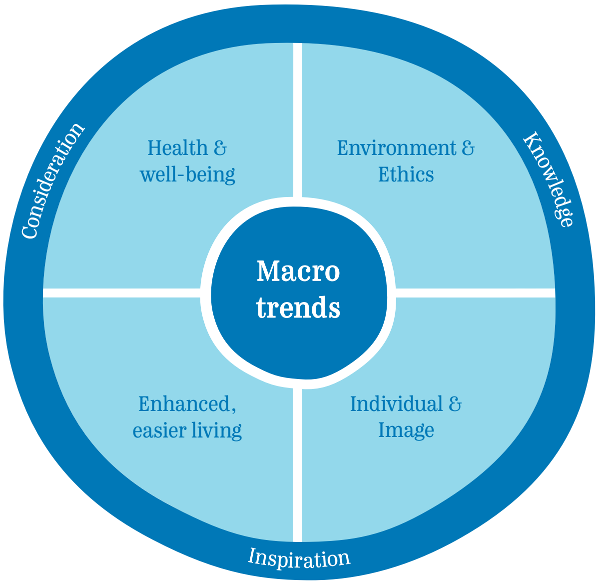
Technology

85 per cent of the adult population now has access to the internet via broadband and over half has a smart phone. The rapid development in mobile phones has changed the purchasing habits of many people. Wherever they may be, they can research a potential purchase or actually buy something. This has increased the public expectations in that companies will offer simplicity and a high quality interaction, irrespective of the purchase channel selected. Mobile phones have, for many people – not least our younger customers – become a deeply personal possession that is the hub of their communication with others. This fact is one of the reasons for the successive change in the look of the media landscape and for the shift in advertising investments from print media to digital and social media. Legislation has failed to keep pace with these changes, but a government committee investigating such areas as the supervision of the way in which alcoholic beverages and tobacco are marketed will present its findings in the future.

Economy

The last year has seen unusually violent economic fluctuations. The Swedish economy went against the globally weak economic performance tide during the first half of the year, but during the summer it slowed down, and has experienced a downturn since September. Despite the clear increase in the number of layoffs, rising unemployment levels and declining confidence in the Swedish economy – the retail trade sector's net sales increased and broke new records. Contributory factors included record-low levels of interest rates, low inflation, and the fact that the vast majority of Swedes were personally unaffected by the crisis. A "crisis awareness" normally only develops once an economic crisis has a personal impact on an individual or someone close to them. Swedish e-commerce continues to develop strongly – a trend that is partly linked to the fact that more and more consumers feel safer with online shopping.

Some of the trends we are seeing are shown below.



The trend analysis takes into account our core key words because they form the basis for our customer offering.

Enhanced, easier living

Convenience and ease

Convenience and ease are strong trends nowadays. People are feeling the impact of time pressure more and everyday life is a constant battle to juggle their commitments. As a result of the time pressure, more and more people are looking for the quick, the easy, the uncomplicated approach and those who can afford it, are willing to pay for it. The products or services that save them time and make day-to-day life that little bit easier and more convenient. This includes everything from home deliveries of their groceries to "RUT" tax deductions for household services.

Accessibility

The increased use of new and advanced technology has generated new opportunities for reaching out to people. The buying process is an ever-present one as more and more companies invest in meeting their potential customers through a combination of physical and digital interfaces. They are creating customised, personalised offerings, with full integration between the channels and 24/7 accessibility. This, in turn, is leading to a growing demand that other companies offer the same degree of user-friendliness, whatever channel the customer chooses.

Health and well-being

Health

The vast majority of Swedes are interested in health and six out of every ten swedes exercise at least twice a week – and with participation in the competitions that form part of the "Swedish classic" sporting event breaking new records every year. Most people say that they would like to eat and drink more healthily and sales of alcohol-free drinks have increased substantially for several years in a row. It is also apparent, alongside the prevailing health trend, that the population is getting heavier and that a growing number of Swedes are consuming alcohol in a way that puts them in the risk zone for alcohol abuse.

Pleasure

Another clear trend apparent in a range of different areas is the desire on the part of many people to treat themselves to something that makes them feel good. It might be an experience of some kind, such as a mini-break, or a visit to the theatre or spa, but it might also be about food, drink and meal experiences – we watch TV programmes with chefs who cook delicious dishes and we are buying cookbooks as never before. A clear fragmentation is also developing within the Swedish grocery retail sector, with both an increased interest in value-for-money staples and a premiumisation. Many are looking for something local, exotic, new or "hot" – something that gives them a feeling of something extra in their lives.

Ethics and the environment

The environment

Climate change and the environment are issues that concern us. "Natural" is still equated with "healthy" and we are recycling more and more. At the same time, however, sales of organic products decreased in 2012, both within Systembolaget and in the grocery retail sector.

Local and authentic
In an increasingly complex environment in which we are exposed to thousands of messages on a daily basis and face a seemingly endless stream of choices, the number of people looking for something local and authentic is increasing. They want something that is genuine and has local roots. They want products that state where and how they were produced. The increasing availability and sales of locally produced food and drink are a prime example of this trend.

Transparency
The use of new technology and new channels is also leading to a shift in the balance of power Companies are becoming more vulnerable and consumers are gaining more say as a result of increased transparency. The internet and social media mean that many consumers can quickly learn about the way in which companies operate, making Corporate Social Responsibility (CSR) increasingly important. This is true both in terms of responsibility for ensuring we eliminate any impropriety within the company and of working towards the creation of a better world –from an environmental and a social perspective.

Individual and image

Belonging
Many people are keen to use their consumption and their consumer behaviour to create an identity, a sense of belonging. There is a desire to show who you are or would like to be, and the groups to which you belong, through the people and things with which you surround yourself. This behaviour is growing, as it becomes easier and easier to join or leave a range of different communities than in the past, when many people either were, or felt locked in. Food and drink habits are a common way of marking where we belong, of showing that we are curious and experimental, active and health conscious, or traditional and interested in exclusivity.

Service and expertise
Service and expertise will become increasingly important. Therefore the range of product and service offerings increases. This is true, not just in the form of digital interactions, but in the face-to-face sphere. Customers don't want to feel like part of a crowd: they want the interaction to make them feel special – feel "chosen". They want easy access to the guidance and advice they need. The winners will be those companies who dare to be personal, and who see the customer behind the computer screen.

What do these trends mean for our product range?

They mean, amongst other things, that we shall offer...

... products with a lower alcohol content and alcohol-free products, to satisfy the desire to choose healthier options.

... smaller packagings, both for health reasons and to satisfy the demand from some of the many single-person households.

...products in all price classes in line with the sector fragmentation that is seeing our customers demand both exclusive products that offer that little bit extra in the way of pleasure, and more value-for-money staples.

... PET, corrugated cardboard packaging and lightweight glass, in order to reduce our impact on the environment and climate.

... organic products and ethically certified products, because more and more people want to do the right thing and help other people.

... locally produced products that satisfy the demand for local, authentic products

... new product types, countries of origin and styles. In an individualised society like in Sweden, people are increasingly looking for unique experiences.

Our customers

If we are to ensure that we launch the right products, we must not only monitor the driving forces and trends, we must also understand our customers. To this end, we conducted a customer segmentation in 2010, complemented with new information in 2013. This helps us hone our product range strategies and formulate our offerings and services in an optimum way.

Systembolaget's customer segmentation comprises eight different groups as of this year, and a group of people who do not drink alcohol at all – teetotallers – who make up 10 per cent of the Swedish market. The figure in parenthesis refers to the segment's share of the total number of customers.

Cautious traditionalists (16%)
The cautious traditionalists have, as their name indicates, a traditional character. They seldom drink, and when they do, it is mainly on special occasions, such as public holidays and celebrations. This segment comprises both men and women, with those over 60 and with a below-average income over-represented. The cautious traditionalists are not particularly interested in alcoholic drinks and do not like trying new products. They are interested in arts and crafts, books, crossword puzzles and music. They shop at Systembolaget every other month, or less frequently. When they consume alcohol, they prefer to drink wine or beer, but in comparison with other customers segments, are low consumers of cider & mixed drinks.

Blokes who yearn to learn (13%)
Levels of commitment to alcoholic drinks are high in this customer segment. It mainly comprises men aged between 30 and 60, and is over-represented in big cities. They work full time and have an above-average income. They live with a partner, with or without children, and are interested in motor sports, hunting & fishing, gaming and TV. Beer is a major hobby, and whilst they have their favourites, they like trying new products. They usually consume alcohol during "boys' nights out", when they mainly drink beer and whisky. They consume twice as much beer as other customer segments, almost twice as much spirits, and their consumption of wine and of cider & mixed drinks is more or less on a par with that of other customer segments. Their main reasons for consuming alcohol are to wind down and to forge bonds. They shop at Systembolaget every other week or more. They buy new products every time they visit the store, and the main reasons for trying new products is a desire to try something new, or they've tasted it in a bar.

Sophisticated connoisseurs (14%)
The sophisticated connoisseurs have an extensive interest in alcohol and are curious about new products and the latest trends in wine. They are sociable and like organised parties. They are keen to show off/demonstrate their knowledge to others around them, and it's important to them that the wine goes with the food. This customer segment comprises both men and women and is over-represented in the 50+ age group. Many have further or university education and they have a high income. Their likes include travelling, reading books and cooking. They consume alcohol, usually wine, several times a week at dinners with friends and/or family. The consume more or less the same amount of spirits as the other customer segments, slightly less beer, and half as much cider & mixed drinks. Their main reasons for consuming alcohol are to enhance the meal's taste experience. The sophisticated connoisseurs shop once a month or more at Systembolaget and they buy new products every time they visit the store, and the main reasons for trying new products is that they have read a review, received a recommendation from a friend, and read about the product on the shelf-edge label.

Unpretentious bon vivants (14%)
Bon vivants want to indulge themselves and to enjoy life. Their level of knowledge when it comes to alcoholic drinks is not very high, but they are keen to learn more. They see alcohol as an important part of everyday life and hence drink alcohol several times a week. They enjoy taking a glass while cooking – it's part of it. This segment comprises both men and women aged 40+. They live with a partner, with children, and have college or university level education. They work full time and have a high income. Their main interests are travel, books and music. They consume less cider & mixed drinks than other customer segments, but are otherwise high consumers of the other product groups. The main reasons for consuming alcohol

are that it feels slightly luxurious and sophisticated to them and that they think it enhances the taste experience of their food. The unpretentious bon vivants shop once a month or more at Systembolaget. They buy new products on one visit in three, and their main reasons for trying new products is that they have received a recommendation from a friend, have read a review, and have read about the product on the shelf-edge label.

Social experience seekers (15%)
Social experience seekers are young, curious and want a life that includes challenges. For them, it's important to stand out from the crowd and they seek out brand names that reflect the things they like and who they are. Alcohol has a social context for this group, and they often find it hard to refuse a drink when everyone else around them is drinking. This segment comprises both men and women and is strongly over-represented in the 18-30 age groups. They are mostly single or in relationships with no children, and are students with low incomes. Their biggest interests are partying, music, TV/computer games and going to bars. They often consume at pre-parties and in the great outdoors (picnics, festivals, etc.), when they primarily consume beer. They drink almost twice as much cider & mixed drinks as other customer segments and consume more than the average of all product groups. The main reasons for consuming alcohol are to feel more relaxed/exhilarated, to get drunk, or to escape everyday life for a little while. The social experience seekers shop every other week or more at Systembolaget. They buy new products on one visit in three and their main reasons for trying new products are that they have received a recommendation from a friend, that they want to try something new, or that the bottle looked interesting.

Healthy security seekers (16%)
The healthy security seekers mainly comprise women aged between 20 and 39, they are over-represented in sparsely populated areas and many are full-time workers or students.

Appearance is important to this group, who want to continue to look young and keep up with fashion. Fashion, exercise, and interior design are their main interests. Their levels of alcoholic drinks are not particularly great but when they find one they like, they often continue to buy it. Otherwise, they often choose drinks by their bottle design or label. They don't drink particularly often, and when they do, it is mainly to indulge themselves with something special. They mainly consume cider & mixed drinks, but consume less than the average of the other product groups. The healthy security seekers shop once a month or less at Systembolaget. They buy new products on every visit to the store, and their main reasons for trying something new are that the bottle looked interesting, that they read about the product on the shelf-edge label and that they wanted to try something new.

Folksy bargain hunters (11%)
The folksy bargain hunters generally think that there is too much snobbery associated with wine and price plays an important role when they choose drinks. They are happy to drink the same drink, whatever the situation and/or season, and they are also keen to buy alcohol to keep "in stock" at home. This segment comprises both men and women, and the majority are aged 50+. They are married or cohabit and have children (but the children do not live at home). Their education level is elementary or compulsory school, upper secondary school or adult community colleges, and they have an average income. Their main interests are watching sport, doing crosswords, and DIY. They consume more often than the average when they are not working (at the summer cottage, on the boat, on holiday), when they primarily consume wine and beer. They do, however, drink more spirits than the average. Their main reasons for consuming alcohol are that it goes with the situation/is traditional. The folksy bargain hunters shop once a month or less at Systembolaget. They very seldom buy new products, but if they do, the main reason is that they have received a recommendation from a friend.

Monitoring

Customer Satisfaction Index (CSI)

Systembolaget have been conducting surveys of how satisfied our customers are since 2001. The survey forms the basis of the CSI (Customer Satisfaction Index). Data collection for the CSI takes place in all stores four times a year. Customers are surveyed at random in stores and the questionnaire covers questions regarding areas such as the product range, selection, store layout and accessibility, social responsibility, the staff-customer interaction and staff expertise. Just over 30,000 interviews were carried out in 2012.

CSI 2012 summary

Our customers have never been more satisfied. The Customer Satisfaction Index (CSI) for 2012 increased by two points to a new record high of 81. The three areas with the biggest impact on the CSI trend are Range and selection, which increased by one point to 76, Social responsibility, which fell by one point due to reformulated and new questions to 73, and Store staff, which rose to a record high of 87. The survey also shows that Range and selection is one of the two areas with the greatest potential for further boosting the overall CSI rating.

Range and selection

The quality area has been stable at around 76 for several years now.

Red wine retained its previous and relatively high index of 78 at the same time as customers' rating of the remaining wine range rose (+1 to 78 for white wine and +2 to 77 for other wines). The indices for spirits and for cider and mixed drinks also increased to 79 (+2) and 76 (+2), respectively. The alcohol-free range accounted for the biggest increase, rising by 8 points to 79. The lowest – relatively speaking – index value when it comes to satisfaction was awarded to the beer range, which stayed at its previous level of 75.

Customers' expectations of Systembolaget increase as their interest in and knowhow when it comes to the drinks we sell grows. Today's consumers increasingly expect the range to reflect their specific demands and that "their products" will be available, whenever and wherever they choose to shop. The range experience in the stores where we have trialled the new product range model has outperformed the average in equivalent stores and we believe, therefore, that there is every likelihood that satisfaction ratings will be even higher in future surveys.

Value for money

The index for the Value for money quality area – one of the areas with the least impact on the overall CSI figure – rose by two points in 2012 to 71 and the same is true of the index for price levels in general (63). Customers' perceptions of quality relative to price improved for all product categories. The index figures wine (77) and beer (73) increased by two points, while the spirits index rose by one point to 69.

Quality Supplier Index (QSI) –increased customer value key ratio

Since March 2012, all of Systembolaget's suppliers have received performance-related information, based on a number of key ratios with a direct or indirect effect on customer value. The key ratios measured include delivery date precision, product availability and quality complaints. Every supplier can now monitor their key ratios and the factors behind each ratio via a control card. The system is designed to incentivise suppliers to improve both their internal processes and their partnership with Systembolaget with the overall aim of generating increased customer value. Every supplier also receives a weighted total key ratio that summarises the component elements.

In the autumn of 2012, Systembolaget decided to introduce a new strategic key ratio, namely the Quality Supplier Index (QSI). The QSI comprises the average of the weighted total key ratios of the suppliers who account for 99% of sales at Systembolaget.

When the QSI was measured for the first time at the end of 2012, the 102 biggest suppliers collectively accounted for 99% of sales at Systembolaget. The average of all weighted key ratios was 92.7, and this is, therefore, the QSI key ratio for 2012.

Systembolaget's objective in making the QSI a strategic key ratio that is monitored continuously is to generate better preconditions for increased customer value in partnership with our suppliers.

The QSI goal for 2013 is 93.0 – a level currently achieved by 30% of our suppliers.

Structuring the product range

Systembolaget shall develop and deliver a sustainable offering that inspires a healthy enjoyment of our products for everyone in Sweden. The ability to offer a customer-orientated product range and a high quality offering are important factors for success. We must select the right product, at the right price, and of the right quality for every customer segment and must distribute it in the right quantity to the right channel at the right time. And we must do this in a manner that is both sustainable and responsible.

Important cornerstones of our product range work

We shall:

- offer a product range that is both broad and deep and which is, at the same time, perceived as modern and innovative;
- offer a product range that enhances the food and drink experience;
- offer many products in smaller packagings;
- offer products with lower or zero alcohol content;
- promote the trend towards more sustainable drinks production;
- offer organic alternatives;
- offer more climate-friendly packagings;
- offer more products that meet the guidelines for ethical production;
- meet the requirements for profitability and efficient management in the logistics chain and in-store.

Product range strategy

Systembolaget's product range strategy is an internal steering document. The product range strategy, which is revised annually, defines guidelines, goals and activities for the entire product range. The range shall be brand-neutral, quality assured and profitable. It shall also be permeated by our core key words: consideration, expertise and inspiration. Systembolaget's product range strategy shall, first and foremost, endeavour to realise our vision.

The product range and product range structuring shall be adapted in line with changes in the world in which we operate and shall be developed in a way that improves our ability to interact with our customers and live up to their expectations. Our customers shall always feel welcome at Systembolaget and that we share our expertise with regard to the product range. We shall, from a starting point of customer benefit, act transparently and work in partnership with our suppliers to generate the preconditions for mutual success.

The overall goal of the product range work is to contribute to the creation of a sound drinking culture and to take customer satisfaction to even higher levels. We do this by ensuring that the product range lives up to our customers' needs and expectations and that it inspires them to have a pleasurable food and drink experience. At the same time, we shall work responsibly with our product range with regard both to reducing the harmful effects of alcohol and to generating sustainability from a CSR perspective. Our monopoly means that we are the only point of retail sales for alcoholic beverages. We must also meet the potential demands of certain minorities when it comes to our products and their content on the basis of, for example, their religion (kosher, etc.), or specific dietary requirements (e.g. gluten-free beer).

Innovations

We endeavour to progress development within our field and we test innovations that may help improve the customer offering. Our aim is to be amongst the first in the world to sell innovations. All innovations are tested on the basis of their quality and shall comply with Systembolaget's basic requirements. They shall also preferably support not only the product range strategy, but Systembolaget's mandate and operational goals.

Product range roles

We have divided the range into different product range roles in order to ensure that we meet our customers' requirements. The importance of the range's various components differs, as, hence, do their roles for both the consumer and the store and digital channels. Each product range role is carried by all of our stores, but their precise distribution will vary, depending on the size of the stores and their individual demand levels. By analysing the sales of the respective roles, taking into account the different requirements and sizes of the stores, we create a useful tool for distributing the range across our stores. The roles are Profile, Cutting Edge, Volume, Service and Season. The product range's structure, launch level, subsidy level and product placement will, for example, be adapted in line with the categories' respective roles.

Volume
The Volume product role represents the majority of Systembolaget's sales, in terms of both volume (number of litres) and value. Most of our customers buy from the volume role, where the quality/price ratio is the most important parameter for them. Therefore Systembolaget wishes to offer a wide Volume range that is perceived as offering value for money.

Profile
The Profile product role should be broad and deep, and customers should perceive it as both inspirational and responsible. The range should also encourage customers to want to learn more about our products and we are keen, in this respect, to show off the importance of different manufacturing methods, raw materials and countries of origin to the flavour profile of the drinks we sell. We want to be the best in the world in this sphere.

Cutting Edge
We offer a Cutting Edge range to satisfy the most demanding customers. The Cutting Edge categories add depth to the range and focus primarily on the most pre-eminent districts and regions in the classic wine-producing countries. The Cutting Edge product role also includes the exclusive range of beers, spirits and wines that is constantly renewed through frequent launches of small, limited offerings on Systembolaget's website and in selected stores.

Service
The categories within the Service product role ensure that our customers are offered a wide selection of products in relatively low demand. The selection of products in the majority of the service categories is consequently narrow and lacks depth.

Seasonal
The Seasonal product role is designed to ensure that Systembolaget can offer its customers an up-to-date and seasonally adjusted range of products. The range shall be broad and shall generate excitement and inspiration in-store.

Our categories
Systembolaget's range is divided into five category groups: wines, spirits, beers, ciders & mixed drinks, and non-alcoholic beverages. The groups are, in turn, divided into different subcategories and segments. The segmentation takes into account price intervals, product types and packaging types. Items largely regarded by customers as interchangeable are grouped within the same segment. Systembolaget has a total of approximately 150 segments. The breakdown of the range into categories and segments are made on the basis of the customers' purchase decisions in the respective categories.

Category action plan
The customers' requirements and the guidelines and goals of the product range strategy form the basis for the categories' action plans, constituting the category managers' primary tools in their category work. The category action plans describe in detail how each category shall be run in the year ahead in order to satisfy customers' requirements and achieve the product range goals. The purchasing staff's analyses of their areas of responsibility are based on availability and quality and the product and business intelligence provided by the suppliers are important parameters in drawing up the category action plans.

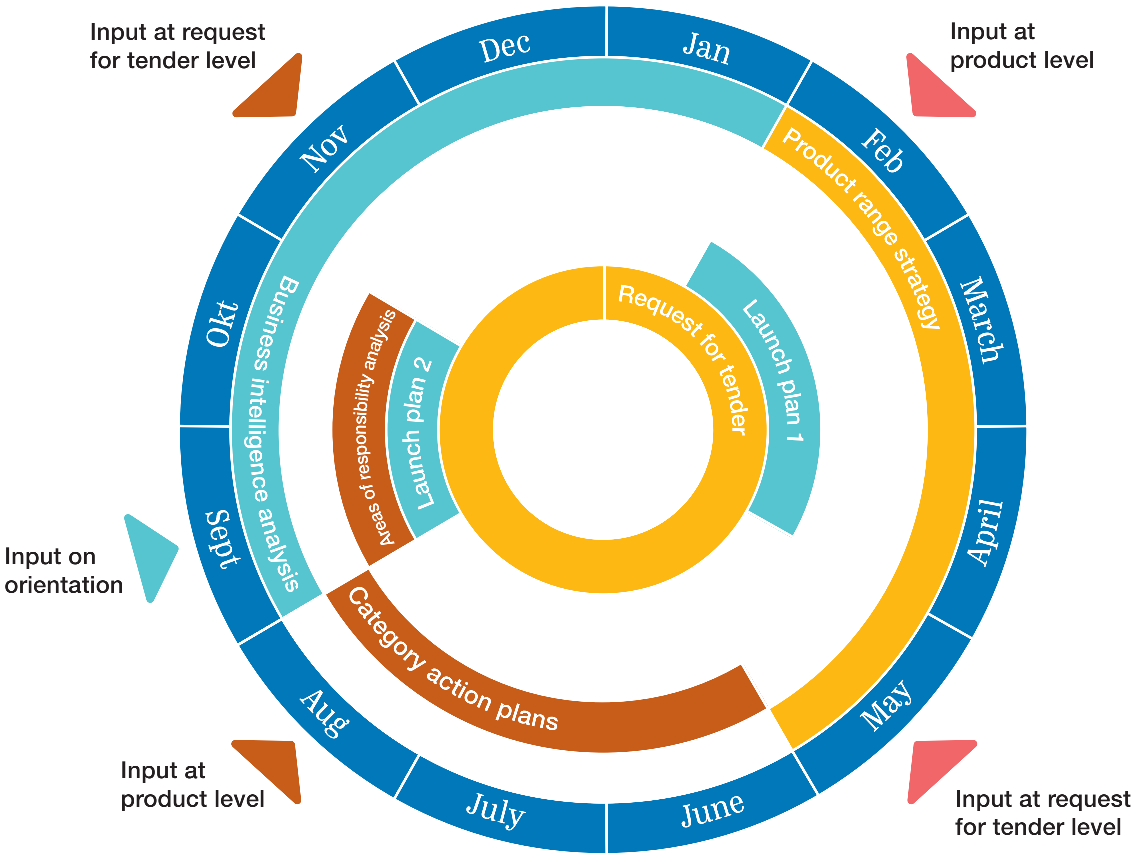
Range mix plan
The category managers produce quarterly range mix plans (formerly known as module plans) for every store group based on customer demand and Systembolaget's product range strategy. The range mix plans describe the range mix to be supplied by the stores, i.e. the number of articles within each segment to be carried by a given size of store in a given store grouping. The range mix plans are the steering documents for the product range evaluations conducted quarterly.

Launch plan
The launches shall provide competition for and complement the existing range and shall offer

inspiration and novelty value for the customer. The launch plan is an overall steering document for our launches and describes the sort of products that Systembolaget will be looking for in the year ahead. Our launches shall satisfy the customers' requirements and respond to changes in the outside world that affect customers' drinks choices. They shall also help ensure fulfilment of the product range strategy.
The launch plan is published twice yearly with the main launch plan published in May and a complementary plan published in November. The main launch plan offers 100% coverage of the launches in March and June. The main launch plan only specifies some of the September and December launches in order to enable faster decisions, and thereby enhance customer value.

Requests for tender and blind tasting

A request for tender is formulated for each launch on the basis of the launch plan and specifies in detail the type of product that Systembolaget is looking for. The request for tender specifies, for example, the segment, price, and flavour type. Once the submitted tenders have been reviewed, the purchasers request product samples.
Systembolaget's sampling room takes charge of the product samples and prepares to test them. The order in which the tasting panel tests the samples is always random and samples are always tested blind. The panel evaluates the products' quality in relation to the flavour description in the request for tender. The product or products that receive the highest score after blind tasting, and have the highest internal priority are bought in. The product's characteristics are determined and a bouquet and flavour description and the pie charts used in our product catalogues are produced ahead of the launch. The characteristics are then published on Systembolaget's website, on the shelf labels in the stores, and in the New Launches ("Nyheter") brochure.



We work to a yearly plan, in order to create transparency in the purchasing process. The yearly plan shows when we would like to receive input at strategic level from you, as a supplier, when we would like input on the orientation of the launch plan, and when the focus is on the structure of the requests for tender.

Quality assurance

The result of Systembolaget's quality work insures that the right products is in optimising our offering to our customers.

Quality assurance is an ongoing process for the existing range and a more detailed one for the new launches. Amongst other things the work involves chemical analyses of all product. This is made in Systembolaget's laboratory. The work also includes sensoric checks of new vintages by the purchasers, tracking of the products most commonly returned by the complaints department, and the provision of feedback to you, our suppliers.

New launches

The quality assurance for new launches begins in conjunction with the request for tenders, when Systembolaget grades the request for tender by risk on a scale from A (greatest risk) to C. The augmented monitoring mainly applies to requests for tender in the Volume product role, but requests for tender that are prioritised from a CSR perspective are also assigned an A-risk rating.

The product we choose to launch is determined entirely by the product's sensoric and qualitative properties in relation to those specified in the request for tender. One of the fundamental requirements is, therefore, that the products delivered to our stores are of the same sensoric style, quality and chemistry as the winning tender sample.

Our customers must receive the right product and you, the supplier, should be able to rest assured that the product that has won the blind tasting is the product that ends up in our stores.

Winning tenders

The product that wins the tender sampling process is sent to our laboratory for chemical analysis and the bottles left from the tender samples submitted are saved for future checks. The second and third place tender samples from the blind tasting are also saved for A-risk rated requests for tender. We do this to ensure we can carry out the same checks if the winning tender proves unable to deliver the agreed quality.

Launch sampling

The launch samples are used as a checkpoint en route to the launch but are not a formal approval of the quality delivered. The samples are also used for labelling controls, chemical analysis and characteristic sampling. They are also used for tastings by journalists. The extra tender samples submitted for A-risk rated launches are used for comparison testing purposes.

Sampling when sales begin

Sampling when sales begin constitutes the formal approval of the launch and involves comparing the tender samples saved with samples taken from our stores. Triangle testing is always conducted for A-risk rated launches. If the triangle test indicates inconsistencies, a comparative quality test is carried out to ensure the absence of any sensoric inconsistency. The A-risk rated launches also undergo a chemical analysis.

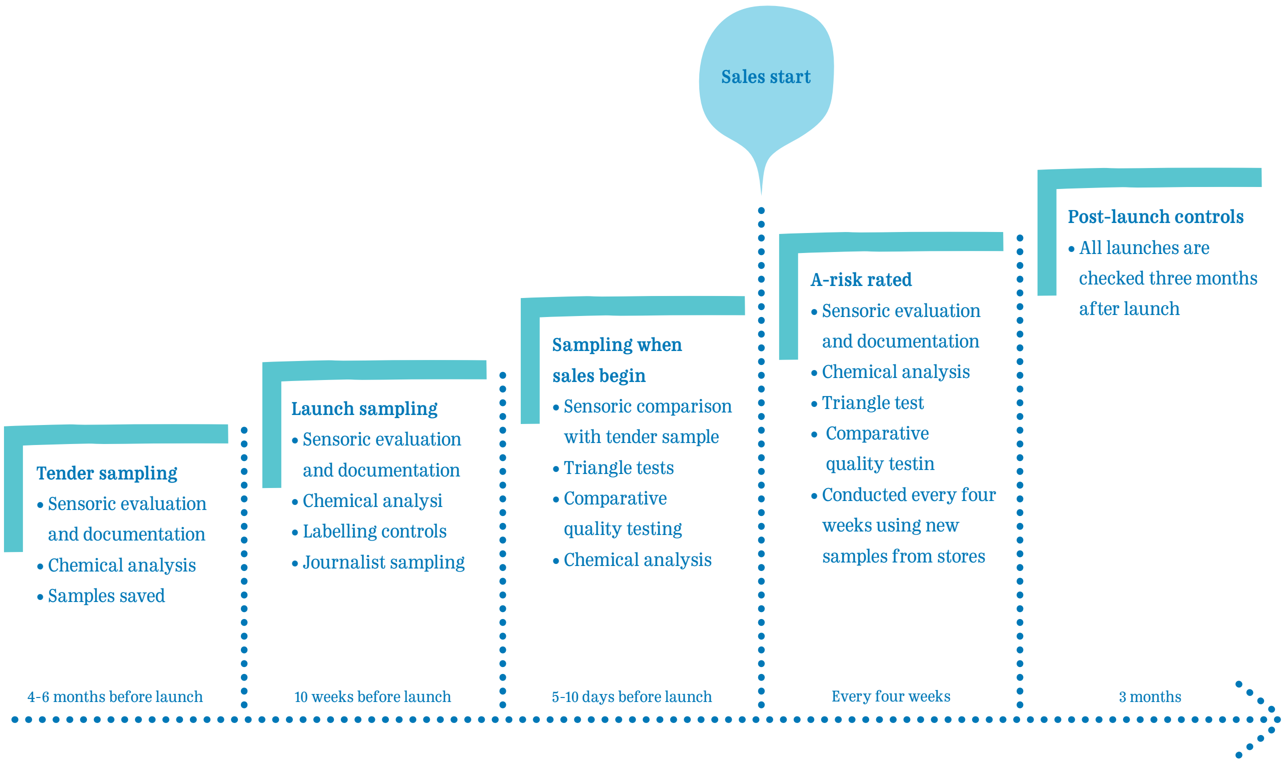
If an inconsistency is identified, we contact the supplier. If the inconsistency is judged to be significant, we return the product on quality grounds. The supplier is then, in accordance with the purchasing terms, given the opportunity to deliver a product with the agreed quality. If this is not possible, Systembolaget will cancel the purchasing agreement for the product in question.

Post-launch controls

Post-launch controls take place 3 months after launch and entail comparing the product most recently delivered to the stores against the products taken from the stores in conjunction with sampling when sales begin. The A-risk rated items are checked in this way every four weeks in a test that includes chemical analyses.

Guarantee of Supply

Some requests for tender demand a Guarantee of Supply. Where this is the case, it shall be completed correctly and appended to the tender. The party identified in the document as the producer shall be the same party as the one identified as the producer in the tender. The party identified in the document as the supplier shall be the party who submits the tender.


Sales start
Tender sampling
• Sensoric evaluation and documentation
• Chemical analysis
• Samples saved
4-6 months before launch
Launch sampling
• Sensoric evaluation and documentation
• Chemical analysi
• Labelling controls
• Journalist sampling
10 weeks before launch
Sampling when sales begin
• Sensoric comparison with tender sample
• Triangle tests
• Comparative quality testing
• Chemical analysis
5-10 days before launch
A-risk rated
• Sensoric evaluation and documentation
• Chemical analysis
• Triangle test
• Comparative quality testin
• Conducted every four weeks using new samples from stores
Every four weeks
Post-launch controls
• All launches are checked three months after launch
3 months

Systembolaget promotes sustainability

Responsible suppliers

Systembolaget's monopoly entails a special responsibility with regard to neutral product selection. But it also gives us a unique opportunity to influence the entire drinks industry to act in a sustainable way. Our goal is to ensure that everything we sell is produced and handled in a way that takes responsibility for both people and the environment. Our Code of Conduct is the base level standard and any deviations from the Code result in action plans that are followed up. We also have more ambitious objectives, however, in the form of a focus on organically certified and fair trade products. Systembolaget's aim, thereby, is to work in partnership with our suppliers and producers towards the creation of a more sustainable society.

Code of conduct and BSCI partnership

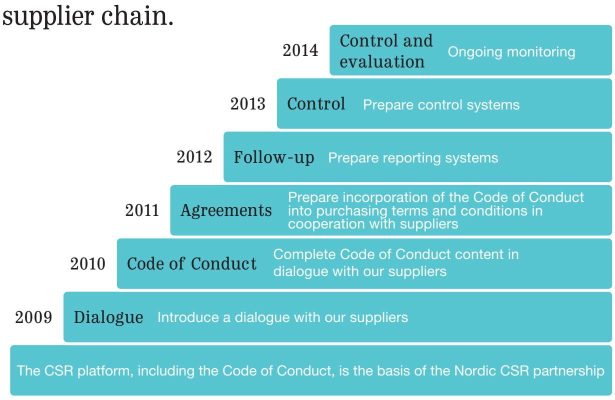
The Nordic alcohol monopoly partnership is implementing its programme in stages over time to ensure that both we and our suppliers can lay the proper foundations for developing our operations in a more sustainable way. This work has been conducted in all five Nordic countries since 1st January 2012 and follows the Code of Conduct of the European CSR organisation, BSCI (Business for Social Compliance Initiatives). Systembolaget has been a member of BSCI since 2011. The Code of Conduct is based on, amongst other things, the ILO conventions, the UN Declaration of Human Rights, and UN Convention on the Rights of the Child.

The Code of Conduct focuses on the following ten areas:

- Regulatory compliance
- Right of association and the right to collective bargaining
- Freedom from discrimination
- Pay
- Working hours
- Health and safety at work
- Prohibition of child labour
- Prohibition of forced labour and disciplinary measures
- Environmental and safety issues
- Company routines and processes

Five steps in five years

The Nordic partnership has been developed over a 5-year period. As of 2013, we have been in the fifth stage which means that we have begun working, in partnership with you – our suppliers – on establishing a systematic programme of monitoring compliance with the Code of Conduct. The monitoring work includes training, stakeholder dialogues, self-assessment forms, and third party monitoring. In 2013, we will be conducting 15 third party audits in South Africa, Chile and Bulgaria. Every supplier in our drinks supplier chain is obliged to ensure that their contractors also comply with the Code of Conduct requirements and our suppliers consequently have wide-ranging responsibility for informing, supporting and monitoring to ensure that your producers comply with the requirements, e.g. by ensuring that everyone in the workplace is familiar with the Code of Conduct. Systembolaget offers its suppliers training and a variety of tools to assist you in this work, through BSCI, to ensure that, together, we can work towards a sustainable development of our supplier chain.



Sustainable dialogue

Working conditions among vineyard workers in South Africa and Chile have been highlighted by the media in a number of contexts. Systembolaget handles information received regarding any incidents of unacceptable conditions through dialogue with the supplier and producer in question and, when necessary, carries out third party audits in order to monitor compliance with our Code of Conduct.

Our purchases make regular visits to the producer countries in order to learn more about CSR in the producer stage of the chain, to gain an overview of conditions and to capture the views of various stakeholders on our CSR work. The Nordic monopolies have also conducted visits to South Africa, southern Europe, South America and California. In 2013, we will be travelling to Bulgaria and Romania. The problems we have noted during our visits include pay, working hours, accommodation, employees' rights and, in particular, problems in connection with migrant workers and seasonal employees. We also engage in dialogues with producers, voluntary organisations, universities, trade union representatives, embassies, and fair trade organisations. The monopolies do not just represent five customers: they represent five countries, which means that by working in partnership with our suppliers, we can achieve substantial changes when it comes to sustainability.

Systembolaget's environmental work

Systembolaget has a long-term environmental plan that extends to 2020 and which is based on an extensive environmental study. The prioritised areas in which there is considerable scope for reducing our impact are packaging, transportation, production and cultivation.g.

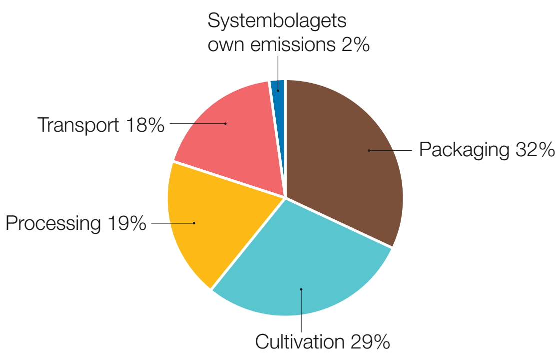
Packaging

The basis of our work on packaging includes the LCA (Life Cycle Assessment) study of wine packagings that we carried out in 2010. The study showed that boxes, bags and liquid packaging cardboard generally have a lower environmental impact than glass bottles. PET bottles are rated between glass bottles and the other types of packaging. The biggest environmental impact for all types of packaging occurs during the manufacturing phase. This means that the less material one uses, the better it is for the environment. Reducing the bottle weight of glass bottles, in particular, offers enormous potential for reducing the environmental impact. Systembolaget's goal is, therefore, to increase the percentage of lightweight glass bottles and to increase the percentage of PET bottles and tetra packs.

In early 2013, Systembolaget commissioned a survey of the global availability of lightweight glass as part of which, we defined lightweight glass as a maximum bottle weight of 420g for a 750ml bottle. The survey showed that both Bordeaux- and Bourgogne-style bottles are available in lightweight glass in all of the major countries that supply wine to Systembolaget. The range is greatest in Europe, where lightweight glass is relatively well established. A number of organisations, such as WRAP (www.wrap.org.uk) have conducted extensive studies of the quality of lightweight glass showing that this type of glass can tolerate the loads normally experienced in the supplier chain and that customers respond positively to lightweight glass when they are told about its benefits from an environmental viewpoint. Systembolaget will, therefore, continue to work – on the basis of this study – to promote the introduction of lightweight glass for the majority of our products.

Systembolaget's total climate impact

360 000 tonnes CO_2



Total emissions of greenhouse gas emissions recalculated as carbon dioxide equivalents. This includes not only Systembolaget's own operations within Sweden, it also includes the impact of cultivation, manufacturing (processing) and the transport of our products, together with the impact caused by all forms of packaging.

The product range model

Systembolaget uses a product range model in order to ensure our ability to live up to our mandate of offering a customer-orientated, broad, cost-effective and brand-neutral product range. The product range model is based on customer demand and means that stores with similar patterns of customer demand will receive the same product range.

The product range

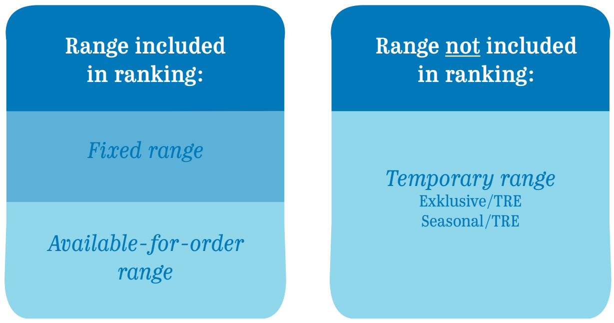
Systembolaget's product range is divided into three different sections, each of which has different terms and preconditions, namely the Fixed range, the Available-for-order range, and the Temporary range

Fixed Range
The fixed range shall satisfy the demands of the majority of Systembolaget's customers, inasmuch as its composition reflects certainty, continuity and a long-term approach that also ensures breadth and depth. The range's six different mixes enable Systembolaget to ensure that every individual store meets this objective. The allocation of the product range to every single store is carried out in a brand-neutral way and is based on customer demand. The majority of Systembolaget's sales are made from within the fixed range, which is renewed four times a year, in March, June, September and December.

Available-for-order Range
The available-for-order range includes items that can be ordered from the drinks suppliers' stocks. The items can be ordered in stores, from agents, and from our website systembolaget.se. Items in the available-for-order range that prove to be very popular with the customers may qualify for the fixed range. Tenders for the available-for-order range are submitted on a rolling basis and new products are released every month.
A private import service is offered for customers who require help with ordering an item not listed in Systembolaget's regular range.

Temporary Range
Temporary Range – Exclusive
The items in the Temporary Range – Exclusive are exclusive in nature and the target group comprises customers with a substantial interest in new items. These launches take place in selected stores (as volumes are small) and are announced to customers on our website systembolaget.se.

Temporary Range – Seasonal
Temporary Range – Season comprises the items that we buy in for a very limited period of time and which are strongly linked to a particular festive season or tradition. We carry them for the duration of the season and if customer demand is high, they may return the following year. Examples include seasonal beer for Easter and Christmas, Oktoberfest beer and mulled wine.



Distribution of the range

Systembolaget has a nationwide retail network comprising ca. 420 stores and over 500 agents. It also has an available-for-order range and some items from the fixed and temporary ranges can be ordered on systembolaget.se. Our goal is to offer Systembolaget's entire range on systembolaget.se by the autumn of 2013.

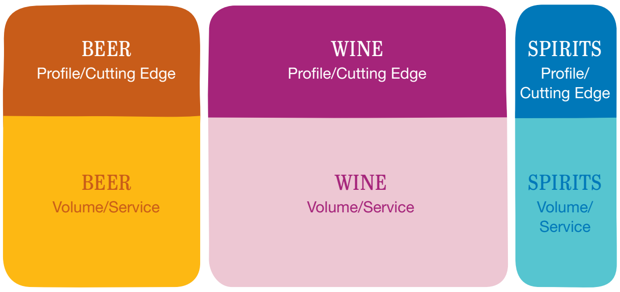
Store groupings and product range mixes
We base our store grouping process on each individual stores' customer demand in order to ensure that we provide the right products for the right customers. We have identified six different store

groupings where customer demand and requirement patterns are similar. Each store grouping receives a product range mix tailored specifically to their customer demand, irrespective of the size of the store or its geographic location.

The product range mixes differ with regard to composition in terms both of volume, profile and cutting edge products, and of the number of wine, spirits and beer categories. Each store grouping contains different sized stores. The smaller stores will receive fewer items than the larger ones, but the product range mix is the same.

Size of store	Number of items
A	approx. 500
B	approx. 940
C	approx. 1480
D	approx. 1930
E	approx. 2130
Specialist wine store	approx. 3200

Store groupings with a standard requirement



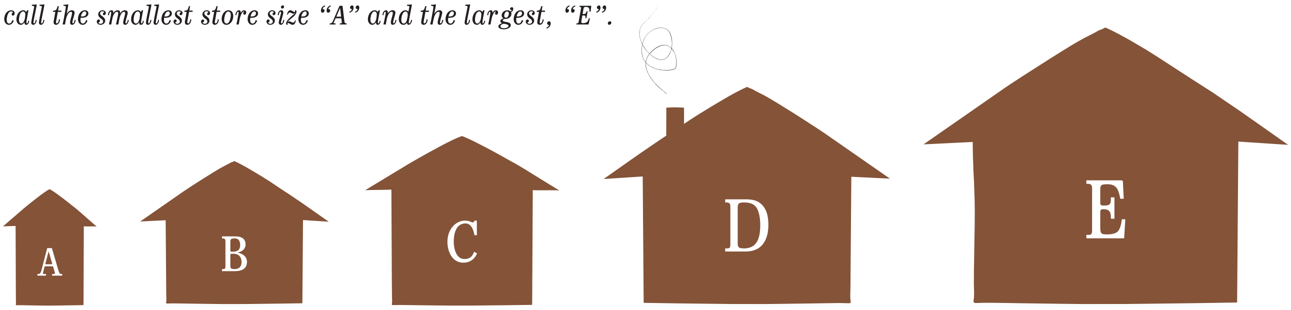
Product range mix 1

Product range mix 1
The customers who shop in store grouping 1 outlets demand more beer than the average, and primarily pale lager in cans. Wine is mainly sold in boxes and tetra packaging, and white spirits dominate spirit sales. The product range mix comprises all product groups and product range roles, but emphasises beer and the product range role, volume. Approximately 123 stores receive Product range mix 1 and they account for 16 per cent of customer visits. The stores are largely small or medium-sized ones and are located in smaller towns nationwide. Some of the suburbs of Stockholm and Gothenburg are also represented in this grouping, as are a number of stores on the Norwegian border and stores in Vimmerby, Bromölla, Orsa, Arvidsjaur and Söderhamn.

Product range mix 2

Product range mix 2
The customers who shop in store grouping 2 outlets have an average demand for wine, spirits and beer. There is, however, a slightly higher demand for whisky, boxed and tetra packaged wine, cider and mixed drinks than in the average stores. The 160 or so stores with this product range mix account for 43 per cent of customer visits. The stores are located in small and medium-sized towns and in the suburbs of Stockholm and Gothenburg, and the majority of these stores are in the southern and central areas of Sweden. Jakobsberg, Köping, A6 in Jönköping, Ronneby, Örnsköldsvik, Eslöv and Hudiksvall are all examples of this type of store.

The product range mix is adapted in line with the size of the store. Smaller store = fewer items. We call the smallest store size "A" and the largest, "E".



Product range mix 3

Product range mix 3
The customers at outlets in store grouping 3 buy more wine than customers in the average stores. The main demand is for boxed, tetra packaged and bottled wine priced up to SEK 79. Just over 40 stores have this product range mix and they account for 12 per cent of customer visits. The stores are located in Skåne, along the west coast, and in the area around Stockholm. Vallentuna, Trosa, Landskrona, Varberg, Jägersro and Ystad are all examples of this type of store.

Product range mix 4

Store groupings with a premium requirement

Product range mix 4
SThe product range mix contains an average breakdown of beer, wine and spirits, with the emphasis on items from ranges that are part of the Product range roles – Profile and Cutting Edge. The customers in these stores buy more expensive and more exclusive items. There is a higher level of customer demand for specialist beers, champagne, other sparkling wines and bottled wine, irrespective of price band. Demand for the spirits product group is slightly lower than the average but higher when it comes to digestifs, malt whisky and drinks and cocktails.

17 stores have product range mix 4 and they account for 8 per cent of customer visits. The stores are primarily located in larger towns and some medium-sized ones. Globen and Rotebro in Stockholm, Karl Johansgatan in Gothenburg, Wasagallerian in Umeå and Åre are all examples of this type of store.

Product range mix 5

Product range mix 5
Demand for wine is higher amongst customers in store grouping 5 outlets than in the average store and demand for products from segments in the Product range roles Profile and Cutting Edge is high. The customers buy more than the average amount of champagne, other sparkling wines and bottled wine priced at over SEK 80. Demand for beer is lower than average but higher in the specialist beer and pale bottled beer segments. This product range mix meets a customer requirement for more expensive and more exclusive products and the focus is on wine. The product range mix can be found in 66 stores that account for 22 per cent of customer visits. The stores are located in and around Stockholm, Malmö and Gothenburg, but can also be found in smaller towns in southern Sweden. Regeringsgatan, Brommaplan and Lidingö in Stockholm, Nova in Lund, Hansacompagniet in Malmö, Båstad and Grebbestad are all examples of this type of store.

Product range mix 6
Currently we have two stores located in food halls in Stockholm. Those stores have product range mix 6 and their customers buy wine, first and foremost. The stores are in a setting in which food is sold and breadth is consequently important in order to be able to offer drinks to go with all types of food. The special circumstances generated by very small stores with over the counter sales also affect the composition of the range. The spirits sold are, by and large, exclusive.

The stores' locally popular range

In addition to the centrally allocated range, stores also carry a number of items – a "local selection" – that is unique to the individual store. These items are chosen to complement and broaden the store's range in light of local demand.

Product range evaluation

Systembolaget has four product range changes per year in the stores: on 1st March, 1st June, 1st September and 1st December. The updating of the range is based on an evaluation of the items' sales over a 3-month period. The evaluation includes all items from the fixed range and the available-for-order range and is based on the volume of sales for individual items and Systembolaget's trading margin. All items are also assigned a volume correction and a weighting factor for market coverage that yields the item's points total. A ranking list per segment is then drawn up, comparing items in the same segment with one another. The item with the highest points total receives the most widespread distribution within that segment. The number of items distributed and the scale of the distributions is determined by the product range mix plans.

Product range mixes 1-3 and 4-6 are evaluated separately, allowing differences in customer demand between the store groupings within a single segment to be reflected in the stores' product ranges.

New items are also launched in conjunction with every product range change. New items are available for a minimum of six months. The first selling month is not included in the evaluation period, which covers months two up to and including four.

Drinks suppliers receive a weekly preliminary ranking, via the Supplier portal, that enables them to track their items' performance in comparison with others in the same segment. The aim is to facilitate forecasting of future volumes in both the short and the long term.

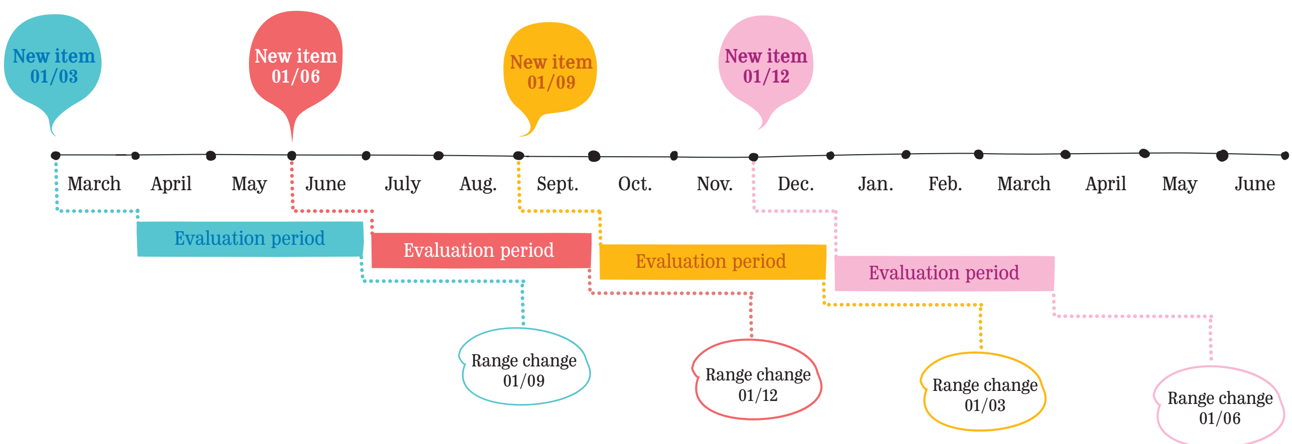
Multi-channel product range and service

We are also, in addition to our work on the product range model that controls how we distribute the product range, developing the service we provide through a number of digital channels. By visiting our website systembolaget.se, customers can not only search for products, but share our food and drink expertise in a variety of different ways. The systembolaget.se website had 21 million visits in 2012, corresponding to a year-on-year increase of 4 million, and Systembolaget's "Sök & hitta" [Search & find] app for smart phones was used seven million times.

"Vad passar till?" [What goes with this?] is an online advisory service that was launched in the spring of 2012 and which offers suggestions on what to drink with various different foods. The service is based on the collective expertise of our personnel when it comes to food and drink combinations.

Systembolaget's Twitter-based advice system was launched at the end of 2012. The unique feature of this system is that users' questions are answered by store employees nationwide.

The autumn of 2012 also saw the launch of the first phase of a home delivery trial, as part of our endeavours to respond to changes in purchasing behaviour. The trial is being conducted on a limited scale and is being evaluated by alcohol researchers. Once the evaluation process is complete, a decision will be taken on whether to make home deliveries part of Systembolaget's standard service model.



Exclusive product range

The exclusive product range comprises products with very limited availability and a relatively high price level. The items are bought in from standing requests for tender, without blind tasting, as agreed with the respective purchasers.

Systembolaget's ability to buy in and launch exclusive products is far outstripped by the number of exclusive products available worldwide and the selection is consequently made by the purchasers in line with the product range requirements, customer demand and the product's reputation.

Interest in exclusive beer has exploded in recent years and beer not only accounts for the biggest percentage increase but is also responsible for the massive total volume increase. All categories are showing growth in both value and volume.

Sales performance of Exclusive range

	Value (sales in SEK mil., incl. VAT)	Change in value	Volume (thousands of litres)	Change in volume
Red wine	129	16%	360	27%
White wine	31	15%	113	20%
Other wine	30	9%	83	22%
Spirits	61	15%	57	7%
Beer	40	82%	401	90%
Total	292	21%	1 014	50%

New distribution model

The exclusive product range will be distributed in a new way from September 2013. The old T5-T8 modules will be replaced by distribution stages I-VI.

Distribution stage	Number of stores
I	no store, online launch
II	1
III	2
IV	5
V	15
VI	20

The number of stores in the different stages will be accumulated such that an item launched with distribution at stage IV will reach a total of approximately 8 stores.

Stage VI corresponds to the existing T5 module, in which the items are distributed to 40 or so stores. The stores will be chosen in line with customer demand within the respective categories to a greater extent than at present, and there will hence be some stores that are only assigned beer, others that are only assigned spirits, and still others that are assigned wine.

Stage IV, where the five stores with the biggest demand for exclusive beers, spirits or wines receive a greater number of new launches than today's T5 stores, is new. These items will also be distributed to the three wine cellar stores, yielding a total of eight stores.

No items will, until further notice, be launched in stage V. The store grouping will, however, be used when rolling out new launches with stores that have greater levels of customer demand potentially being allocated a larger percentage of the volumes bought in.

In the stores, the customers will recognise the exclusive product range as Limited offerings. Stores in stages IV, V and VI will, as of the spring of 2013, have separate shelves for limited offerings of beer and wine. Limited offerings of spirits and instances when items are held in stock in other stores will receive a supplementary "Limited offerings" shelf label.

systembolaget.se

Interest in ordering exclusive products via systembolaget.se is already considerable, and is growing. We will be developing our online offering during the year and placing great emphasis on ensuring that customer satisfaction levels are as high when they purchase online as they are when they visit the traditional stores.

Categories and segments

Wines

Red wines

Carton packaging

- **Tetra packaging**
- 2204 Red wine not box or bottle > 500ml
- **Box**
- 2201 Red wine box 1.5-2l
- 2202 Red wine box >= 3l (0-66.60 SEK/l)
- 2203 Red wine box >= 3l (0-66.70 SEK/l)
- 2203 Red wine box >= 3l (66.70-..SEK/l)

Bottles

- **Glass & PET**
- 2101 Red wine (0-59)
- 2102 Red wine (60-69)
- 2103 Red wine (70-79)
- 2104 Red wine (80-89)
- 2105 Red wine (90-99)
- 2106 Red wine (100-119)
- 2107 Red wine (120-149)
- 2108 Red wine (150-199)
- 2109 Red wine (200-..)

Small-sized packaging

- **Glass & PET**
- 2110 Red wine small bottles
- **Tetra packaging**
- 2205 Red wine not box or bottle <= 500ml

Large bottles

- 2111 Red wine large bottles

White wines

Carton packaging

- **Tetra packaging**
- 3205 White wine not box or bottle > 500ml
- **Box**
- 3201 White wine box 1.5-2l
- 3202 White wine box >= 3l (0-56.60 SEK/l)
- 3203 White wine box >= 3l (56.70-66.60 SEK/l)
- 3204 White wine box >= 3l (66.70-..SEK/l)

Bottles

- **Glass & PET**
- 3101 White wine (0-59)
- 3102 White wine (60-69)
- 3103 White wine (70-79)
- 3104 White wine (80-89)
- 3105 White wine (90-99)
- 3106 White wine (100-119)
- 3107 White wine (120-149)
- 3108 White wine (150-..)

Small-sized packaging

- **Glass & PET**
- 3109 White wine small bottles
- **Tetra packaging**
- 3206 White wine not box or bottle <= 500ml

Large bottles

- 3110 White wine large bottles

Rosé wines

Carton packaging

- **Tetra packaging**
- 4202 Rosé not box or bottle
- **Box**
- 4201 Rosé box

Bottles

- **Glass & PET**
- 4101 Rosé (0-69)
- 4102 Rosé (70-..)

Small-sized packaging

- **Glass & PET**
- 4103 Rosé small bottles
- **Tetra packaging**
- -

Large bottles

- -

4509 Other wine, segment

Sparkling wine

Small bottles

Dry & medium-dry

4404 Sparkling wine small bottles

- **4304 Champagne small bottles**
- 4404 Sparkling wine small Bottles
- 4304 Champagne small Bottles
- **Rosé**
- 4409 Sparkling rosé small bottles
- 4307 Rosé Champagne small bottles
- **Sweet**
- 4407 Sweet Sparkling wine small Bottles
- **Other sparkling wines**
- -

Bottles

- **Dry & medium-dry**
- 4401 Sparkling wine (0-69)
- 4402 Sparkling wine (70-99)
- 4403 Sparkling wine (100-..)
- 4301 Champagne (0-249)
- 4302 Champagne (250-399)
- 4303 Champagne (400-..)
- **Rosé**
- 4408 Sparkling rosé
- 4306 Rosé Champagne
- **Sweet**
- 4406 Sweet sparkling wine
- **Other sparkling wines**
- 4410 Other sparkling wine

Large bottles

- 4405 Sparkling rosé large bottles
- 4305 Champagne large bottles

Spirits and mixed drinks

Clear spirits

Gin

- 5104 Gin
- 5105 Gin small bottles

Tequila

- 5109 Tequila

Snaps

- 5601 Spiced distilled spirits
- 5602 Spiced distilled spirits small bottles

Unspiced spirits

- 5101 Unspiced distilled spirits
- 5102 Unspiced distilled spirits small bottles

Flavoured spirits

- 5103 Flavoured vodka
- 5108 Flavoured rum

White rum

- 5106 White rum
- 5107 White rum small bottles

Dark spirits

Dark rum

- 5407 Dark rum (from Profile)
- 5408 Dark rum small bottles

Cognac

- 5401 Cognac
- 5402 Cognac small bottles

Other digestif

- 5403 Other brandy
- 5404 Other brandy small bottles
- 5405 Calvados
- 5406 Grappa/marc

Whisky, malt

Scotch malt whiskey

- 5301 Scotch malt whisky <= 18 years old
- 5302 Scotch malt whisky <= 18 years old small bottles
- 5303 Scotch malt whisky > 18 years old

Other malt whisky

- 5304 Other malt whisky

Whisky, blended & other

Scotch blended

- 5201 Scotch blended whisky
- 5202 Scotch blended whisky small bottles

Irish whiskey

- 5207 Irish whiskey
- 5208 Irish whiskey small bottles

American whiskey

- 5205 American whiskey
- 5206 American whiskey small bottles

Canadian whisky

- 5203 Canadian whisky
- 5204 Canadian whisky small bottles
- 5209 Other whisky

Coloured spirits

Swedish punch

- 5507 Swedish punch

Fruit & berries

- 5505 Fruit and berry liqueurs
- 5506 Fruit and berry liqueurs small bottles

Cream & egg

- 5503 Cream and egg liqueurs
- 5504 Cream and egg liqueurs small bottles

Chocolate, coffee, nut

- 5501 Chocolate, coffee and nut liqueurs
- 5502 Chocolate, coffee and nut liqueurs small bottles

Other liqueurs

- 5508 Other liqueurs
- 5509 Other liqueurs small bottles

Other spirit-based drinks

- 5701 Anise
- 5702 Bitters
- 5705 Other spirits, segment

Drinks & cocktails

- 5703 Ready-mixed drinks
- 5704 Ready-mixed drinks small-sized packaging

Beer and cider

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

Apéritif & desert wine

Vermouth
4503 Vermouth
4504 Vermouth small bottles
Fruit wine
Dry & medium-dry
4508 Dry fruit wine
Sweet
4612 Sweet fruit wine
4613 Sweet fruit wine small bottles
Flavoured wine
4610 Flavoured wine
4611 Flavoured wine small bottles

Other apéritif
4507 Sake
4505 Apéritif
4506 Apéritif small bottles
Sherry/Montilla
Dry & medium-dry
4501 Sherry/Montilla
4502 Sherry/Montilla small bottles
Sweet
4606 Sweet sherry/Montilla
4607 Sweet sherry/Montilla small bottles

Port & Madeira
White port
4605 White port
Red port
4603 Red port
4604 Red port small bottles
Madeira
4608 Madeira
4609 Madeira small bottles
Sweet white wines
4601 Sweet white wine
4602 Sweet white wine small bottles

Other dessert wines
4614 Other dessert wine
4615 Other dessert wine small bottles
Mulled wine
4701 Mulled wine

Alcohol-free

Alcohol-free drinks
7101 Alcohol-free wine
7201 Alcohol-free spirits
7301 Alcohol-free beer
7401 Alcohol-free cider & must
7601 Alcohol-free other
7501 Water

Applied as from 1 January 2013

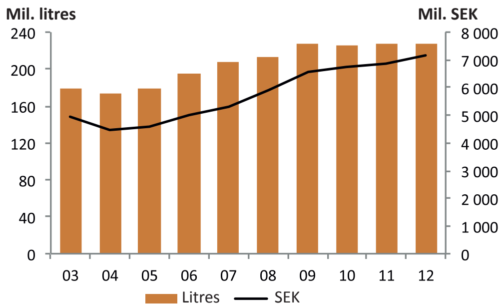
Alcohol sales in Sweden

– The background to Systembolaget's 2014 launches

Systembolaget's sales in 2012 totalled 462 million litres with a total retail value of SEK 31.3 billion. These figures correspond to a slight increase of 0.8 per cent for volume and 2.8 per cent in value in comparison with 2011. A growth in value of 2.2 per cent was still achieved, even if importers' price increases during the year are excluded, indicating that the premiumisation trend is continuing.

There were no dramatic movements between the various category groups in 2012, although the poor summer weather clearly resulted in sales of items with a strong summer link losing ground to less weather-dependent items. Change levels within the categories were otherwise very stable and it is reasonable to assume that the trend will continue along the same lines over the next two years.

Beer



Sales of beer have remained more or less constant over the last four years, growing by 0.5 per cent by volume between 2009 and 2012. The growth by value during the same period, however, was a massive 9.3 per cent, clearly showing that customers' interest in higher quality beers has grown substantially during the period. Beer accounted for 49 per cent of Systembolaget's total sales by volume but only 23 per cent of the total retail value. The volume of beer sold in 2012 totalled 227.7 million litres, corresponding to a small growth by volume of 0.2 per cent. The growth by value in 2012, however, was 4.2 per cent.

The volume of beer sold through the temporary exclusive product range has almost doubled over the past year and totalled just under 400,000 litres in 2012. This is still a very small percentage of total sales, but it is a rate of growth that confirms the strong progress of public interest in beer in Sweden.

Lager beer

Beer lager can	2012 litres	2011 litres	+/-	2012 percentage	2011 percentage
Lager can international (0-5.9%)	23 787 673	22 423 215	6%	14%	13%
Lager can Swedish (0-5.9%)	109 548 528	111 579 460	-2%	65%	66%
Lager extra strong can (6.0 +%)	33 122 185	33 061 642	0%	20%	20%
Dark lager can	1 846 422	1 404 945	31%	1%	1%
Total	168 304 807	168 469 262	0%	100%	100%

Beer lager bottle					
Lager bottle international (0-5.9%)	26 220 143	27 043 744	-3%	58%	58%
Lager bottle Swedish (0-5.9%)	13 233 969	12 877 083	3%	29%	28%
Lager extra strong bottle (6.0+%)	4 878 423	5 346 558	-9%	11%	12%
Dark lager bottle	1 024 302	1 122 746	-9%	2%	2%
Total	45 356 837	46 390 131	-2%	100%	100%

Beer in other packaging	2012 litres	2011 litres	+/-	2012 percentage	2011 percentage
Other lager	281 715	357 918	-21%	99%	100%
Other ale/porter/stout	1 832	1 016	80%	1%	0%
Total	283 547	358 933	-21%	100%	100%

Lager sales dominate within the beer category, with 93.8 per cent of the total volume of beer sold. This does, however, correspond to a decline of 0.8 percentage points, and is accounted for by the 1.8 million litres of sales that have shifted to the specialist beers category.

Canned lager volumes have remained largely unchanged, but we are seeing a clear shift from Swedish lager to international brands with a 6 per cent by volume increase in sales in the latter group that was due in part to new launches. The biggest growth – just over 30 per cent – occurred in canned dark lager, but this was due to a major new launch in a relatively small segment.

Bottled lager's share of sales fell by 2.2 per cent, probably due to the fact that some bottled beer customers are increasingly choosing specialist beers. The relationship between Swedish and international beers in this segment is the opposite of that described above, with Swedish bottled lager's share of sales increasing by 2.8 per cent. One of the important driving forces in this respect, over and above brand loyalty, is flavourful craft beers, which have, in some cases, shown the same sort of growth as that seen in specialist beers.

Specialist beers

Special beer	2012 litres	2011 litres	+/-	2012 percentage	2011 percentage
Ale bottle (0-5.9%)	**4 858 094**	4 094 900	**19%**	**47%**	47%
Porter/stout bottle (0-5.9%)	**314 955**	300 584	**5%**	**3%**	3%
Ale can (0-5.9%)	**655 935**	668 993	**-2%**	**6%**	8%
Porter/stout can (0-5.9%)	**458 332**	403 824	**13%**	**4%**	5%
Ale extra strong (6.0+ %)	**2 203 119**	1 777 125	**24%**	**21%**	20%
Porter/stout extra strong (6.0+ %)	**220 822**	180 468	**22%**	**2%**	2%
Wheat beer/can	**1 133 539**	993 636	**14%**	**11%**	11%
Other beer	**552 033**	304 792	**81%**	**5%**	3%
Total	**10 396 829**	8 724 322	**19%**	**100%**	100%

Seasonal beer					
Easter	**318 074**	321 698	**-1%**	**10%**	10%
Oktoberfest	**454 223**	389 991	**16%**	**14%**	12%
Christmas	**2 567 224**	2 582 682	**-1%**	**77%**	78%
Total	**3 339 521**	3 294 372	**1%**	**100%**	100%

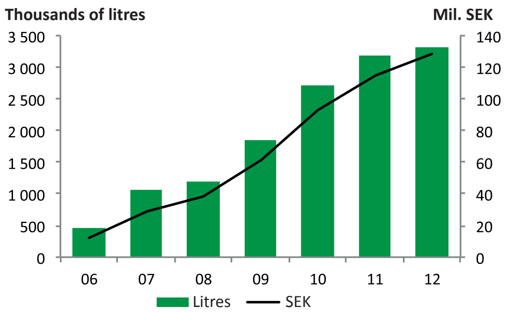
Specialist beers still account for a relatively small percentage of the total volume of beer sold, but with a 19 per cent growth and a sales volume of 10.4 million litres, this category has now overtaken sweet cider. Volumes have increased by 75 per cent since 2007 with a growth rate that has slowly but steadily increased during the period.

Virtually all segments have noted growth, but the highest growth figures are to be found in segments with a high percentage of craft beers. Given that increase occurred in both the temporary and the fixed ranges, we can assume that the increase is not simply due to a small number of beer enthusiasts but to broader customer groups taking an increasing interest in the category.

We believe that this trend will continue and that we will see more of the local, smaller breweries who tend to attract a large part of the media attention. We also believe that the flavourful hoppy beer that originates from the American craft breweries will continue to act as the driving force behind this category, style-wise, and some of our new launches will, therefore, be in response to this style preference.

Our canned launches in this category have been well-received at we will continue to launch craft beers in this packaging format.

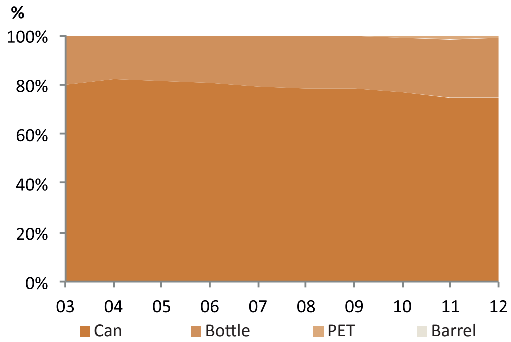
Organic beer



Beer made from organically cultivated raw materials accounted for only 1.3 per cent of total beer volumes in 2012, which is a substantially lower share than those achieved by organic wines or spirits. We are keen to see shares of sales by organic products increase and would therefore ask our suppliers to submit proposals and ideas that will enable us to expand our organic beer offering in the future.

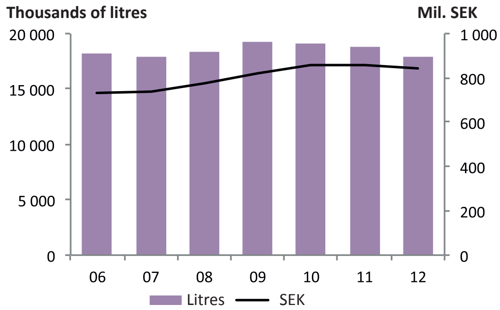
Sales of beer by packaging type

On the packaging front, canned products have lost



market shares since their peak year in 2004, when 82 per cent of all beer was sold in cans. By 2012, this figure had fallen to 75 per cent. It is clear, despite the 1.4 percentage points gain by PET during this period, that the vast majority of these volumes have shifted to non-recyclable glass. This change reflects the increasing interest in specialist beer but from an environmental viewpoint, it is problematic and we are, therefore, keen to see more beer brands being supplied in PET, lightweight glass or recyclable glass packaging formats.

Cider and mixed drinks



Cider & mixed drinks	2012 litres	2011 litres	+/-	2012 percentage	2011 percentage
Dry/medium-dry cider bottle	**755 915**	681 490	**11%**	**4%**	4%
Dry/medium-dry cider can	**661 055**	367 735	**80%**	**4%**	2%
Medium-sweet/sweet cider bottle	**2 185 577**	1 759 922	**24,2%**	**12%**	9%
Medium-sweet/sweet cider can	**7 796 204**	7 899 548	**-1%**	**43%**	42%
Cider other packaging	**2 370**	1 560	**52%**	**0%**	0%
Mixed drinks	**6 540 674**	8 108 132	**-19%**	**36%**	43%
Total	**17 941 796**	18 818 387	**-5%**	**100%**	100%

The combined trend in sales of cider and mixed drinks has been negative since the peak year of 2009, and sales in this category group have fallen by 9.3 per cent by volume during the four years since then. The value of sales has increased by 3 per cent during the same period. Cider and mixed drinks account for 3.9 per cent of Systembolaget's total volume of sales and 2.7 per cent by value.

Cider

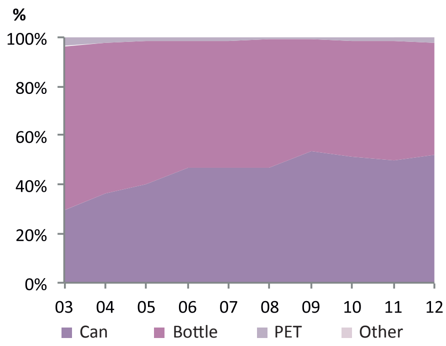
Cider increased by 14 per cent by value and by 6.5 per cent by volume in 2012 to a total of 11.4 million litres. Dry ciders have enjoyed growth for many years now, but have never before risen as high as this year's level of 35 per cent – a figure that may be seen as a sign of a growing interest in more traditional ciders. The fact that locally produced ciders in the available-for-order range still accounts for a very small percentage of the total volume of sales suggests, however, that cider still lags behind beer on the craft trend front. A large part of this segment's increase comes from a single launch of a more untraditional rosé cider, so innovation is perhaps, so far, the primary driving force behind this segment's growth.

Sweet cider sales are showing a more modest increase, growing by 3.7 per cent during the year, but sales now total almost 10 million litres. Sweet cider is the style that best defines this category and which most people associate with the concept of cider. The product range development in this area will primarily be within the base flavours and we are keen to see more items with a slightly lower alcohol content.

Mixed drinks

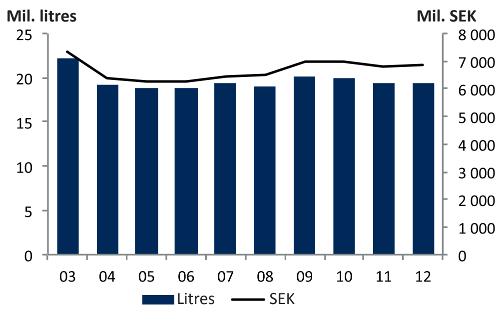
Mixed drinks account for, in principle, the entire decline in this category group. Sales in this segment fell by 19 per cent by volume and by 16 per cent by value in 2012. The category has a customer group with a distinctly lower average age than other categories, and we are seeing a relatively substantial interest in renewal. We will, therefore, increase the number of new launches in 2014 and be focusing on complementing flavours within the product range.

Sales of cider and mixed drinks per Packaging type



On the packaging front, glass bottles still account for a relatively high market share in this category with 48 per cent of the total volume of sales, but we also have the highest percentage of PET containers of all categories in this grouping with 2.3 per cent of sales by volume comprising products with this packaging type. We are keen to see an increase in the percentage of products with lighter weight packaging and are consequently particularly interested in being offered more products with this packaging style in 2014.

Spirits



Spirit sales in 2012 totalled 19.3 million litres, or SEK 6,839 million in retail value, and hence accounts for a mere 4.2 per cent of Systembolaget's total sales volumes, but for 22 per cent of the retail value.

Spirit sales have remained fairly stable over a 10-year period, with only moderate variations and a minor break in sales in 2009. Volumes fell by 0.4 per cent of total sales volumes between 2011 and 2012, but increased very slightly by 0.2 per cent of retail value, probably as a result of general price increases.

The spirits category group is traditionally the one with the lowest level of renewal. Surveys of customers' decision-making processes carried out by Systembolaget in 2012 show that customers are traditional when it comes to making choices within this category group, with greater brand loyalty than that seen in other categories.

Maintaining breadth in the product range while simultaneously being able to offer depth in the most popular segments, is the focus of Systembolaget's planned launches in this category grouping.

White spirits

Clear spirits	2012 litres	2011 litres	+/-	2012 percentage	2011 percentage
Unspiced distilled spirits	3 619 960	3 617 745	0%	51%	50%
Unpiced distilled spirits small bottles	1 229 140	1 280 472	-4%	17%	18%
Flavoured vodka	250 483	299 017	-16%	4%	4%
Gin	972 623	972 970	0%	14%	14%
Gin small bottles	217 811	218 020	0%	3%	3%
White rum	190 451	187 222	2%	3%	3%
White rum small bottles	67 136	62 423	8%	1%	1%
Flavoured rum	454 388	458 813	-1%	6%	6%
Tequila	68 448	67 797	1%	1%	1%
Total	7 070 442	7 164 479	-1%	100%	100%

White spirits are the biggest category within spirits, with sales of 7.1 million litres and is also the category that has shown the biggest decline in volumes in 2012. Sales fell by 1.3 per cent during the year, but this slow-down was smaller than that seen in 2011 when sales declined by 3.5 per cent.

Unspiced distilled spirits and flavoured spirits have experienced a slight decline while light rum and, to some extent, tequila, are experiencing growth. Flavoured vodka sales declined by 16 per cent but this fall can largely be attributed to a single temporary product that sold in large volumes over a short period of time in 2011. Unspiced distilled spirit sales only fell by 1 per cent, but as this segment accounts for 4.8 million litres in sales, the reduction accounts for the biggest share of the category's decline in terms of volume.

Spiced rum sales fell by just under 1 per cent in 2012 and it is clear that we have now reached a plateau after a lengthy sequence of growth years that came to an end in 2011. Light rum sales are still increasing, rising by 3 per cent in 2012. These figures reflect the trend for mixing drinks in the home, with rum often an important ingredient.

Gin sales in 2012 were almost exactly on a par with those in 2011. Sales are characterised by a cautious premiumisation in which a number of more exclusive items in the available-for-order range are also finding an audience.

Spiced distilled spirits

Spiced distilled spirits	2012 litres	2011 litres	+/-	2012 percentage	2011 percentage
Spiced distilled spirits	895 859	903 261	-1%	75%	74%
Spiced distilled spirits small bottles	301 081	318 485	-5%	25%	26%
Total	1 196 939	1 221 746	-2%	100%	100%

Spiced distilled spirits are a category that is experiencing a long-term decline in sales volumes, falling by 2 per cent by volume in 2012. Sales in this category are consequently, for the first time ever, lower than those of malt whisky by volume. The segment is becoming increasingly seasonal and approximately half of all volumes are sold around Easter, Midsummer and Christmas.

One interesting trend is, however, seeing growth by a large number of both locally produced and imported items included in the available-for-order range – almost 20 per cent during the year. This may suggest an increasing interest in new items on the part of certain customer groups.

Whisky and Whiskey

Whisky	2012 litres	2011 litres	+/-	2012 percentage	2011 percentage
Scotch blended whisky	2 896 311	2 957 286	-2%	46%	47%
Scotch blended whisky small bottles	804 074	821 340	-2%	13%	13%
Canadian whisky	1 181 288	1 193 983	-1%	19%	19%
Canadian whisky small bottles	390 766	403 686	-3%	6%	6%
American whiskey	204 571	189 542	8%	3%	3%
American whiskey small bottles	36 131	36 044	0%	1%	1%
Irish whiskey	571 851	526 933	9%	9%	8%
Irish whiskey small bottles	190 541	156 050	22%	3%	2%
Other whisky	21 540	22 875	-6%	0%	0%
Total	6 297 073	6 307 740	0%	100%	100%

Whisky and Whiskey, excluding malt whisky, account for 6.3 million litres in sales, corresponding to 32.6 per cent of the total volume of spirits sold. The category has remained largely unchanged since last year, albeit with some shifts in volumes within the category. Sales volumes have fallen across the board within the Scottish and Canadian whisky segment, while sales of US and Irish whiskies have increased.

This trend can hardly be said to be to do with spelling: the reason for the shift can, in all probability, be found in marketing measures with the latter segment being dominated by brands often seen in advertising campaigns, not least on TV. Irish whiskey noted the biggest increase in sales, growing by over 10 per cent in 2012, unlike in 2011 when it grew by just under 1 per cent.

Malt whisky

Malt whisky	2012 litres	2011 litres	+/-	2012 percentage	2011 percentage
Scotch malt whisky ≤ 18 years old	997 179	951 071	5%	82%	81%
Scotch malt whisky ≤ 18 years old,small bottles	86 476	91 593	-6%	7%	8%
Scotch malt whisky > 18 years old	13 987	13 647	2%	1%	1%
Other malt whisky	115 649	118 942	-3%	10%	10%
Total	1 213 291	1 175 253	3%	100%	100%

Malt whisky continues to enjoy very strong growth in Sweden, with sales increasing by 3.2 per cent in 2012 to a total volume of 1.2 million litres. Interest in malt whisky is a nationwide phenomenon and there are now malt whisky clubs in virtually all of the major cities. Swedish customers' love affair with Islay continues to burn and almost one quarter of all malt whiskies sold come from the island, which is an unusually high percentage by international standards.

We are seeing a continued premiumisation of the category with a total value increase of just under 5 per cent. Question marks about the availability of malt whisky stocks in Scotland in the future lead us to believe firmly that growth in value will continue to exceed growth in volume over the next few years.

Digestifs

Digestif	2012 litres	2011 litres	+/-	2012 percentage	2011 percentage
Cognac	334 138	342 628	-2%	33%	34%
Cognac small bottles	83 904	86 030	-2%	8%	9%
Other brandy	80 450	84 655	-5%	8%	8%
Other brandy small bottles	69 761	63 231	10%	7%	6%
Calvados	72 370	73 433	-1%	7%	7%
Grappa/marc	13 502	13 513	0%	1%	1%
Dark rum	307 279	294 075	4%	30%	29%
Dark rum small bottles	49 616	43 796	13%	5%	4%
Total	1 011 020	1 001 362	1%	100%	100%

Sales of digestifs increased by just under 1 per cent in 2012 and the volume of sales totalled just over 1 million litres. Cognac is the biggest seller in this category, but experienced a 2.5 per cent decline in sales during the year. There is nothing to suggest that this negative trend will be broken in the immediate future.

Dark rum deviates from the trend within this category and sales rose by 5.3 per cent since 2011. Dark rum sales are mainly increasing on the premium side and have enjoyed an unbroken series of growth years since 2007, since when they have grown by over 130 per cent by volume.

Ready-mixed drinks and cocktails

Drinks & cocktails	2012 Liter	2011 Liter	+/-	2012 andel	2011 andel
Ready-mixed drinks	112 302	168 169	-33%	54%	60%
Ready-mixed drinks small bottles	94 324	110 804	-15%	46%	40%
Total	206 626	278 973	-26%	100%	100%

Ready-mixed drinks and cocktails sales volumes have declined in 2012, falling by 26 per cent to 207,000 litres. It is too early to say whether this decline is due to a reduction in the convenience trend or whether it, quite simply, reflects the cold summer of 2012, but what we can say is that sales in July were almost 40 per cent lower than in the same month in 2011.

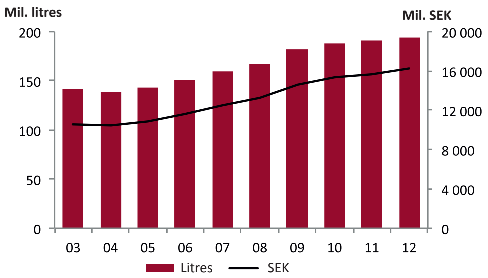
Liqueurs

Liqueur	2012 litres	2011 litres	+/-	2012 percentage	2011 percentage
Chocolate, coffee and nut liqueurs	30 484	29 751	2%	1%	1%
Chocolate, coffee and nut liqueurs,small bottles	91 995	97 005	-5%	4%	5%
Cream and egg liqueurs	358 002	358 497	0%	17%	18%
Cream and egg liqueurs small bottles	137 754	145 493	-5%	7%	7%
Fruit and berry liqueurs	163 274	165 221	-1%	8%	8%
Fruit and berry liqueurs small bottles	272 284	276 914	-2%	13%	14%
Swedish punch	144 232	151 403	-5%	7%	3%
Other liqueurs	414 112	365 868	13%	20%	18%
Other liqueurs small bottles	474 883	421 926	13%	23%	21%
Total	2 087 019	2 012 078	4%	100%	100%

Liqueurs are a large category comprising a number of wildly different products in terms both of flavours and areas of use. Some liqueurs can almost be classified as a type of schnapps, others as digestifs, and still others as comprising, in the main, mixed drink ingredients. In 2012, Systembolaget trialled dividing these products up in store by area of use – an approach that did not work particularly well in that a single item can, in some cases, come under two or more different areas of use.

The category sold 2.1 million litres in 2012, corresponding to an increase of 3.7 per cent. All segments bar one reported negative growth with the exception being the wide-ranging "other liqueurs", which reported a 13 per cent growth – more than any other spirit segment. The majority of the growth was accounted for by a number of shot-type liqueurs – a type of product whose area of use differs from those of most other liqueurs.

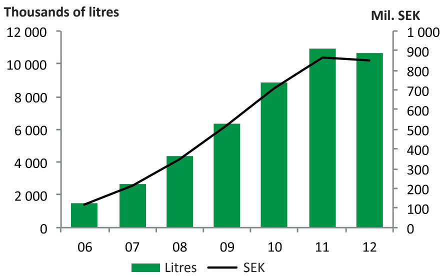
Wine



Wine sales increased by 1.8 per cent by volume in 2012 and totalled 194.5 million litres – a figure that corresponds to 42 per cent of Systembolaget's total sales. The value of the wine sold during this period increased by 3.4 per cent to SEK 16.2 billion, corresponding to 52 per cent of total sales by value. Wine sales have increased by 37 per cent over a 10-year period and this growth has been achieved at a steady rate. The last three years have, however, seen this growth rate taper off. There is nothing to suggest that this cautiously positive growth will not continue over the next few years and it is clear that Sweden can now be regarded as a mature market for wine.

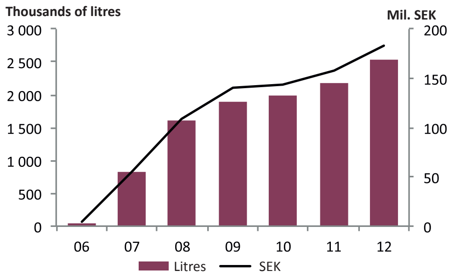
Wine accounts for over half of our net sales in stores and is completely dominates media coverage of our product range. Wine is without comparison, furthermore, the category group that is driven most strongly by new items, and the number of launches in 2014 will consequently be very high. As always, our wine launches will comply with our three core values: consideration, inspiration and expertise. The emphasis we place on the core values varies in line with the product range's different profile roles, with consideration emphasised most strongly in the volume role and expertise in the cutting edge role.

Organic wines



Sales of organic wine at Systembolaget fell in 2012 for the first time ever after many years of high and stable growth. From an average growth rate of almost 50 per cent since 2006, the category reported a decline in 2012 of 3 per cent. This was due, in part, to a couple of items that were forced to surrender their organic certification towards the end of the year. It is clear that the organic range must be rejuvenated if we are to live up to our customers' and society's demands and we will, therefore, be increasing the number of organic wine launches, mainly within the volume role.

Ethically certified wines



The trend in ethically certified products is considerably more positive and no other country in the world buys more ethically certified wine, per capita, than Sweden. The percentage of ethically certified wines from South Africa, Chile and Argentina has now reached 5 per cent and we will continue to launch ethically certified wines from these countries in order to ensure we can offer our customers a wide range of items from which to choose in our fixed range.

Low alcohol wines

Our mandate means that health aspects are, of course, always central for Systembolaget and we will continue working to ensure that the product range contains a good selection of wines in smaller packagings and with lower alcohol contents. We will, therefore, continue to ask for dry wines with an alcohol content of less than 10 per cent and will also be launching a couple of 5.5 per cent alcohol content items in a continuation of the process that began with launches in June 2013. The number of items that fall into this category is limited and we are keen to see more low alcohol products offered by our suppliers.

Product range roles

Our wine range mirrors the product range roles that we have allocated to the various segments through our product range strategy.

Volume wines

The volume role is by far the biggest of the roles, and includes all bottles priced at less than SEK 80, and all tetra packaged and boxed wines, with the exception of the very highest price segments. Our aim, within the volume role, is to cover as many taste types as possible and to place considerable emphasis on responsibility issues in that it is impossible to have a positive impact on the world of wine unless some of the biggest volumes are ethically certified or organic.

In the volume rule, the country of origin is often subordinate to the taste, which must appeal to a broad target group. We see no need to deepen the range with large numbers of items of a similar type. Price is important to many customers, so we are looking for offerings in all price classes. That having been said, we never put active pressure on prices in conjunction with new launches, opting instead to set the price threshold slightly higher in order not to generate a risk of poorer working conditions during production.

Profile wines

The focus within the profile role is on both breadth and depth, and it is where we usually launch items with unusual countries of origin and unusual taste profiles, along with well-known grapes from the world's most famed wine-producing areas. This profile role is home to the biggest number of fixed range launches and the wines are afforded plenty of space in our stores due to the fact that all of our customer segments buy these wines. Inspiration is important within this role, but there is also plenty of room for both consideration and expertise.

Cutting edge wines

The cutting edge role is the narrowest of all the roles and focuses on expertise and depth, rather than breadth. The launches in this role usually come from classic wine-producing areas and well-known grape varieties, with a heavy preponderance of Italian and French wines. A very large part of our launches in the cutting edge role comprise temporary, exclusive launches. Country of origin dominates customer interest in this profile, and we are consequently keen to continuously add less well-known wines in order to ensure that the range does not lack variety. We will consequently implement launches that create breadth, rather than depth, in the fixed range.

Service

Segments within the service role are very important to our customers. There is considerable demand for breadth in that the role often comprises wine types that cannot easily be replaced with other items. Here too, we will continue to have a low launch level but to launch the items needed to enable us to meet our customers' requirements.

Sales of wine per type of packaging

Bag-in-box wines

Bag-in-box wine					
Red wine box 1.5-2L	**503 062**	479 928	**5%**	**0,5%**	0,5%
Red wine box ≥ 3l (0-66.6 SEK/l)	**39 938 703**	37 717 223	**6%**	**39%**	38%
Red wine box ≥ 3l (66.7-..SEK/l)	**20 707 664**	21 027 434	**-2%**	**20%**	21%
White wine box 1.5-2l	**489 807**	362 101	**35%**	**0,5%**	0,4%
White wine box ≥ 3l (0-56.6 SEK/l)	**20 254 623**	19 978 602	**1%**	**20%**	20%
White wine box ≥ 3l (56.7-66.6 SEK/l)	**9 944 721**	9 852 036	**1%**	**10%**	10%
White wine box ≥ 3l (66.7-..SEK/l)	**4 113 547**	4 320 730	**-5%**	**4%**	4%
Rosé box	**5 548 418**	5 322 467	**4%**	**5%**	5%
Total	**101 500 545**	99 060 521	**2%**	**100%**	100%

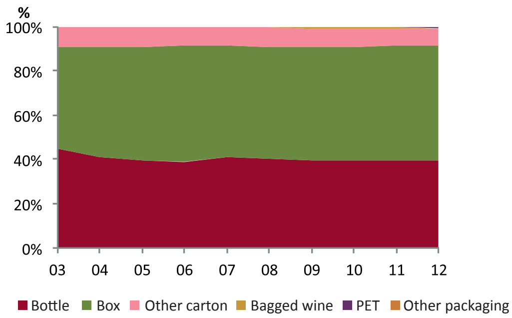
Boxed wines continue to dominate wine sales in Sweden and the volume of sales in this category passed the 101.5 million litre mark in August for the first time ever, rising to 101 million litres by the end of the year. This volume corresponds to 52 per cent of all wine sales, but at SEK 6.4 billion, the value of these sales accounts for only 39 per cent of the total retail value of wine sales by Systembolaget. We are seeing a fairly consistent growth in all price categories, although the most expensive boxed wines have experienced relatively weaker growth than the cheaper ones.

We will continue to launch boxed wines in areas where we can see a lack of offerings. We also believe that new items will enter the available-for-order range to a greater extent than before as a result of the new product range model. This applies in particular to boxes in the lower price categories and to strong brands in higher price categories.

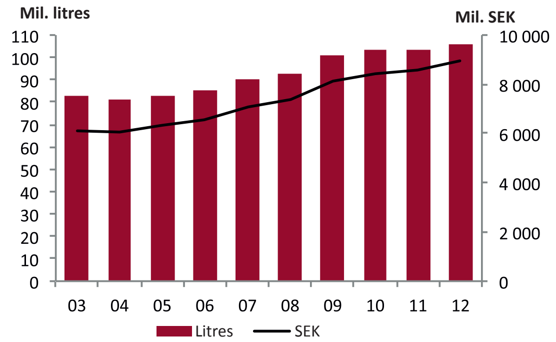
Wine in other packaging

Wine in other packaging					
Red wine, not box or bottle > 500ml	**4 696 455**	5 131 397	**-8%**	**35%**	36%
Red wine, not box or bottle ≤ 500 ml	**141 240**	145 961	**-3%**	**1%**	1%
White wine, not box or bottle > 500ml	**6 794 969**	7 115 176	**-5%**	**50%**	49%
White wine, not box or bottle ≤ 500 ml	**232 138**	214 294	**8%**	**2%**	1%
Rosé, not box or bottle	**1 674 466**	1 813 995	**-8%**	**12%**	13%
Total	**13 539 267**	14 420 824	**-6%**	**100%**	100%

Sales of wine in other cardboard packaging fell by 5.8 per cent to 13.5 million litres, corresponding to just over 7 per cent of all wine sales. The category was characterised by a very narrow pricing band in the lower price groups and has, for some time now, appealed to a customer group that is very satisfied with the range, despite the relative narrowness of the offering. Some of the decline in volume can, however, probably be attributed to the low level of launches in this category in recent years. Cardboard is an extremely good packaging from an environmental viewpoint and we are, therefore, keen to see suggestions for wines in slightly higher price groups that could challenge the perception that tetra packaging is for low-price products only.



Red wine



Rött Vin	2012 Liter	2011 Liter	+/-	2012 andel	2011 andel
Rött vin 0-59 kr	**6 698 908**	7 241 948	**-7%**	**6%**	7%
Rött vin 60-69 kr	**7 806 242**	7 922 588	**-1%**	**7%**	8%
Rött vin 70-79 kr	**7 800 153**	7 468 409	**4%**	**7%**	7%
Rött vin 80-89 kr	**6 636 587**	6 015 320	**10%**	**6%**	6%
Rött vin 90-99 kr	**4 556 932**	3 839 998	**19%**	**4%**	4%
Rött vin 100-119 kr	**2 194 310**	2 060 987	**6%**	**2%**	2%
Rött vin 120-149 kr	**1 420 512**	1 437 566	**-1%**	**1%**	1%
Rött vin 150-199 kr	**1 212 427**	943 986	**28%**	**1%**	1%
Rött vin 200 + kr	**611 583**	634 232	**-4%**	**1%**	1%
Rött vin små flaskor	**1 015 313**	980 564	**4%**	**1%**	1%
Rött vin stora flaskor	**173 077**	199 379	**-13%**	**0%**	0%
Rött vin box 1,5-2L	**503 062**	479 928	**5%**	**0%**	0%
Rött vin box ≥ 3l (0-66,6kr/l)	**39 938 703**	37 717 223	**6%**	**38%**	37%
Rött vin box ≥ 3l (66,7-..kr/l)	**20 707 664**	21 027 434	**-2%**	**20%**	20%
Rött vin ej box eller flaska > 500ml	**4 696 455**	5 131 397	**-8%**	**4%**	5%
Rött vin ej box eller flaska ≤ 500 ml	**141 240**	145 961	**-3%**	**0%**	0%
Totalt	**106 113 168**	103 246 918	**3%**	**100%**	100%

Red wine accounts for 106 million litres, or 54.5 per cent of total wine sales. Volumes increased by 2.8 per cent in 2012 in what was a return to normal growth figures for the category after a fall in volume in 2011.

The trend that has seen our customers demanding more expensive wines continued in 2012 and growth was clearly greatest amongst wines costing in excess of SEK 90 per bottle. Boxed wines did not, however, follow this same trend and the area in which we saw the biggest growth in boxed wine sales was for those costing less than SEK 200, suggesting that there is a need for new launches in the higher price segment of boxed wines. We also anticipate an increasing polarisation, with boxed wines and more expensive bottles showing growth at the expense of the mid-price segment.

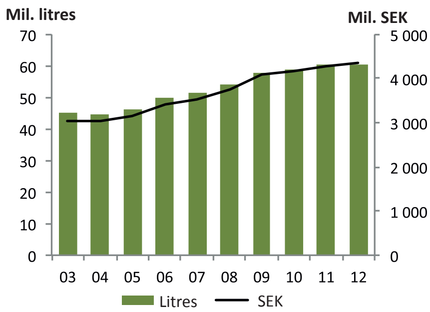
A large number of red wines from the available-for-order range qualified for inclusion in the fixed range in 2012 and these wines accounted for sales of approximately 5 million litres. "Celebrity wines" became a media concept and in addition to "familiar face" wines, we also saw the emergence of Italian Ripasso and Appasimento wines and wines from the Rhône valley in the available-for-order range.

Italy has established itself as the most popular country and accounts for 29 per cent of red wine sales by volume and 32 per cent by value. Not since the mid-1990s have we seen such a strong interest in an individual country of origin, and a number of launches in 2014 will, therefore, have Italy as their country of origin. The wine types that have previously dominated the inflow via the available-for-order range will continue to be refreshed through this channel – a process that will be further facilitated by the new product range model.

Swedes continue to have a good relationship with Amarone wines, sales of which increased by 17 per cent by volume to 867,000 litres, corresponding to 47 per cent of all red wine sold and costing over SEK 150. Almost every other bottle of more expensive red wine sold in 2012 was, in other words, Amarone! Sales of USA wines increased by 17 per cent during the year and this country of origin is dominated completely by Zinfandel, which accounted for almost two thirds of the country's volumes.

Pinot Noir was the fastest growing grape variety, with sales increasing by 35 per cent. Sales of red Burgundy were more than twice as high by volume as those of Bordeaux during the year – a trend that is probably unique from a worldwide perspective.

White wine



Vitt vin 0-59 kr	**4 538 953**	4 857 917	**-7%**	**7%**	8%
Vitt vin 60-69 kr	**4 263 893**	4 069 907	**5%**	**7%**	7%
Vitt vin 70-79 kr	**4 002 422**	4 124 341	**-3%**	**7%**	7%
Vitt vin 80-89 kr	**2 134 852**	1 980 405	**8%**	**4%**	3%
Vitt vin 90-99 kr	**1 464 475**	1 131 002	**29%**	**2%**	2%
Vitt vin 100-119 kr	**981 611**	961 489	**2%**	**2%**	2%
Vitt vin 120-149 kr	**560 046**	509 275	**10%**	**1%**	1%
Vitt vin 150 + kr	**246 601**	217 025	**14%**	**0%**	0%
Vitt vin små flaskor	**580 633**	555 815	**4%**	**1%**	1%
Vitt vin stora flaskor	**25 884**	18 296	**41%**	**0%**	0%
Vitt vin box 1,5-2l	**489 807**	362 101	**35%**	**1%**	1%
Vitt vin box ≥ 3l (0-56,6kr/l)	**20 254 623**	19 978 602	**1%**	**33%**	33%
Vitt vin box ≥ 3l (56,7-66,6kr/l)	**9 944 721**	9 852 036	**1%**	**16%**	16%
Vitt vin box ≥ 3l (66,7-..kr/l)	**4 113 547**	4 320 730	**-5%**	**7%**	7%
Vitt vin ej box eller flaska > 500ml	**6 794 969**	7 115 176	**-5%**	**11%**	12%
Vitt vin ej box eller flaska ≤ 500 ml	**232 138**	214 294	**8%**	**0%**	0%
Totalt	**60 629 172**	60 268 408	**1%**	**100%**	100%

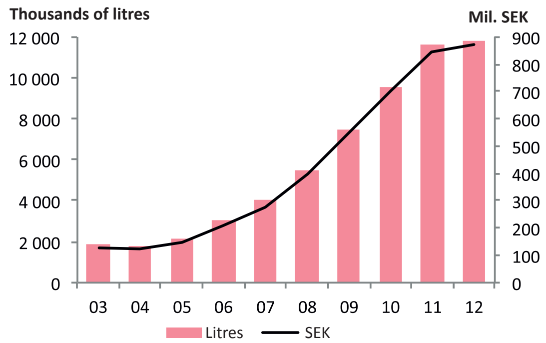
White wine accounted for 31.2 per cent of all wine sold in 2012, with sales of 60.6 million litres. The growth in sales was a modest 0.6 per cent due probably, in part, to the cool summer. The average price of the wines sold was SEK 72 in comparison with a figure of just over SEK 84 for red wines. Customers' interest in spending more money on reds than whites is also reflected in the breakdown into sales in bottles and cardboard packagings, with 69 per cent of white wine sales volumes occurring in the tetra packaging and boxed wines segment in comparison with 62 per cent for reds.

The trend is, however, moving towards higher price segments and we are seeing growth in the category comprising bottled white wines costing in excess of SEK 80. We are not seeing the same premiumisation on the boxed wines front and the range of more expensive boxed wines is relatively small. A number of launches are, in consequence, planned for 2014.

South Africa is the most popular country of origin with the highest market share by both volume and value. The country showing the biggest growth is, however, France, which dominates in the profile and cutting edge roles, particularly within the latter role where French wine accounts for 70 per cent of volumes sold and an even higher share of value. White Burgundy, including Chablis, accounts for almost 50 per cent of sales of white wine costing over SEK 100.

PET packaging has made considerable progress in the white wine category, with sales increasing by 31 per cent in 2012. Unlike in other wine categories, we are also seeing a growth in sales of our white organic wines, even if the increase was limited to a modest 2 per cent of total sales. The increase occurred in the bottled wines segment and we can see a need for the inclusion of white organic boxed wines in our product range. sortimentet.

Rosé wines



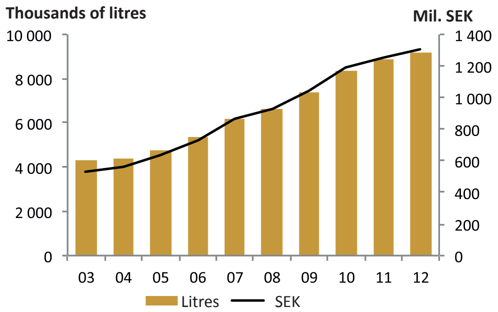
Rosévin	2012 Liter	2011 Liter	+/-	2012 andel	2011 andel
Rosévin 0-69 kr	**2 422 864**	2 687 915	**-10%**	**21%**	23%
Rosévin 70 + kr	**2 049 804**	1 751 762	**17%**	**17%**	15%
Rosévin små flaskor	**92 326**	87 449	**6%**	**1%**	1%
Rosévin box	**5 548 418**	5 322 467	**4%**	**47%**	46%
Rosévin ej box eller flaska	**1 674 466**	1 813 995	**-8%**	**14%**	16%
Totalt	**11 787 877**	11 663 589	**1%**	**100%**	100%

Rosé wine accounted for 6.1 per cent, or 11.8 million litres, of total wine sales in 2012. This corresponds to an increase of 1 per cent in comparison with 2011 in what was a massive break in the trend for a category that has seen two-digit annual growth figures for many years now. A late spring and a cool summer are probable reasons for the change, given that rosé wine is perhaps the most weather-sensitive of all our wine categories.

We are seeing a continued growth amongst boxed wines, sales of which increased by 4 per cent, but the biggest increase was in bottles costing in excess of SEK 70 with an increase of 17 per cent, probably at the expense of the cheaper wines. Growth is also occurring in the area of drier wines to accompany food, where sales of French wines increased by 25 per cent. However, the fruity, sweet rosé wines area is also growing with sales of this type of wine from the USA increasing by 12 per cent during the year.

Future launches will, therefore, continue to be positioned within a variety of flavour types, but the launch rate will fall very slightly from the high level seen during the strong growth period.

Sparkling wines



Mousserande vin	2012 Liter	2011 Liter	+/-	2012 andel	2011 andel
Mousserande vin 0-69 kr	2 209 046	2 208 934	0%	28%	29%
Mousserande vin 70-99 kr	2 661 941	2 368 763	12%	33%	31%
Mousserande vin 100 + kr	272 123	225 595	21%	3%	3%
Mousserande vin små flaskor	346 166	311 291	11%	4%	4%
Mousserande vin stora flaskor	128 870	144 653	-11%	2%	2%
Sött mousserande vin	695 290	699 908	-1%	9%	9%
Sött mousserande vin små flaskor	64 789	67 030	-3%	1%	1%
Mousserande vin rosé	1 171 478	1 240 493	-6%	15%	16%
Mousserande vin rosé små flaskor	39 767	41 577	-4%	0%	1%
Övrigt mousserande vin	413 884	401 184	3%	5%	5%
Totalt	8 003 352	7 709 426	4%	100%	100%

Champagne					
Champagne 0-249 kr	344 337	318 987	8%	29%	27%
Champagne 250-399 kr	593 621	586 518	1%	50%	51%
Champagne 400 + kr	34 189	34 754	-2%	3%	3%
Champagne små flaskor	103 878	106 224	-2%	9%	9%
Champagne stora flaskor	47 268	46 227	2%	4%	4%
Champagne rosé	60 302	61 226	-2%	5%	5%
Champagne rosé små flaskor	6 575	6 494	1%	1%	1%
Totalt	1 190 169	1 160 429	3%	100%	100%

The sparkling wines category, including champagne, showed the biggest growth of any category in 2012, with sales increasing by 3.7 per cent to 9.2 million litres, corresponding to 4.7 per cent of the total volume of wine sold and a massive 8.1 per cent of value.

The increase was spread across virtually all segments, but was markedly higher amongst the more expensive sparkling wines that are not champagne. It is interesting to note that the levelling off in rosé wine sales was even more pronounced in the sparkling category, with sales of sparkling rosé wines falling by almost 5 per cent.

Italy is the biggest country of origin for sparkling wines, and Prosecco has confirmed its status as a strong origin in this category. For champagne, growth is primarily concentrated on the cheaper items and sales of champagne costing less than SEK 250 increased by 8 per cent.

Dessert wines

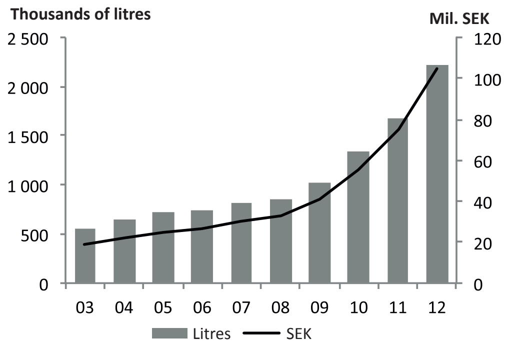
Dessertvin	2012 Liter	2011 Liter	+/-	2012 andel	2011 andel
Sött vitt vin	180 943	188 518	-4%	8%	8%
Sött vitt vin små flaskor	94 370	93 417	1%	4%	4%
Rött portvin	211 007	216 183	-2%	10%	10%
Rött portvin små flaskor	65 518	71 234	-8%	3%	3%
Vitt portvin	20 067	19 604	2%	1%	1%
Söt sherry/montilla	73 362	76 710	-4%	3%	3%
Söt sherry/montilla små flaskor	11 318	13 813	-18%	1%	1%
Madeira	58 087	66 341	-12%	3%	3%
Madeira små flaskor	27 273	28 550	-4%	1%	1%
Smaksatt vin	881 663	907 500	-3%	41%	40%
Smaksatt vin små flaskor	4 584	4 203	9%	0%	0%
Sött fruktvin	301 254	344 155	-12%	14%	15%
Sött fruktvin småflaskor	25 248	21 939	15%	1%	1%
Övrigt dessertvin	176 241	202 927	-13%	8%	9%
Övrigt dessertvin små flaskor	23 166	19 660	18%	1%	1%
Totalt	2 154 100	2 274 752	-5%	100%	100%

Sales of dessert wines fell by 5.3 per cent to 2.2 million litres in 2012 as part of a trend that has been ongoing for some time now. Traditional wines that have held a place in this segment for many years account for the biggest reductions, whilst individual segments such as flavoured wines and sweet wines in half bottles are showing positive growth. All of these segments are regarded as service segments and are refreshed on a modest scale only.

Aperitifs

Aperitifs are a category that includes numerous different types of wine and one in which sales fell by 6.4 per cent to 1.7 million litres. The decline is a trend being repeated in many countries where dry wines with relatively high alcohol content are moving in the opposite direction to the majority of trends we are seeing in the outside world. Here, too, the launch level will continue to be low.

Non-alcoholic beverages



Alcohol-free	2012 Liter	2011 Liter	+/-	2012 andel	2011 andel
Cider & Must	**307 408**	170 391	**80%**	**14%**	10%
Spirits	**36 209**	54 454	**-34%**	**2%**	3%
Beer	**498 722**	461 872	**8%**	**23%**	28%
Wine	**1 055 834**	882 616	**20%**	**48%**	53%
Other	**276 383**	92 817	**198%**	**12%**	6%
Water	**36 992**	15 620	**137%**	**2%**	1%
Total	**2 211 548**	1 677 770	**32%**	**100%**	100%

Sales of non-alcoholic beverages increased by 32 per cent in 2012 to 2.2 million litres, corresponding to 0.5 per cent of Systembolaget's total sales. The volume of non-alcoholic beverages sold has quadrupled since 2003 and the value of sales last year totalled SEK 105 million. Non-alcoholic wines and beers accounted for almost one half and one quarter, respectively, of all sales in this category, but the biggest growth was seen amongst products that are uniquely non-alcoholic, such as apple juice and exclusive Christmas Soda.

The non-alcoholic beverages category is also seeing a clear premiumisation. Many customers are buying high-quality apple juice at prices that exceed the average price for wine, indicating that there is a clear demand for craft-style, quality products in the non-alcoholic category, too.

The health trend continues to be strong, giving us reason to believe that this category will continue to grow and we are delighted to see an increasing interest on the part of the grocery retail sector in offering non-alcoholic alternatives to alcoholic drinks.

Our launch level in this category has been high in recent years and the focus in 2013 will continue to be on the revision and refreshment of the existing range. Systembolaget will also, as part of the new product range model, be able to adapt the range to ensure that the right store receives the right range in line with customer demand there,

The launch plan does not specify which non-alcoholic products that will be sought and suppliers are referred to the Supplier portal instead for further information. Here, they will find details of the dates that apply for the respective requests for tender, approximately how many products we intend to buy in, and a brief description of the main type of product for which we are looking. When evaluating the products, Systembolaget takes into account not only the sensoric quality but anticipated customer demand, the look of the packaging, the brand, and the price. We will continue to look for really good non-alcoholic red wines and a non-alcoholic Christmas beer, as these products have been requested by our customers.

Contact details

Purchasing Director
Sara Norell, +46 8 503 325 60
sara.norell@systembolaget.se

Category Managers
The Category Managers should be contacted in connection with enquiries relating to the structuring of the product range (categories and segments, product range mix plans, and strategic positions), evaluation and problems with items' availability.

Please see the Supplier portal for the latest category breakdown.

Group Manager
Ulf Sjödin,
+46 8 503 303 76
ulf.sjodin@systembolaget.se

Group mail
kategoriansvariga@systembolaget.se

Group mail
Dan Ihrelius (locum),
+46 8 503 325 83
dan.ihrelius@systembolaget.se

Märta Kuylenstierna,
+46 8 503 302 92
marta.kuylenstierna
@systembolaget.se

Mats Olauson,
+46 8 503 325 71
mats.olauson@systembolaget.se

Anna Rosenberg, 08-503 325 56
anna.rosenberg@systembolaget.se

Purchasers
Questions relating to the Purchasers' areas of responsibility should be addressed to the Purchaser in question, while general issues are best addressed to the Assistant Purchaser in question.

Please see the Supplier portal for the latest breakdown of areas of responsibility.

Gruppchef
Fredrik Arenander,
+46 8 503 301 27
fredrik.arenander@systembolaget.se

Purchasers
Johan Ahlstedt (locum),
+46 8 503 303 47
johan.ahlstedt@systembolaget.se

Josef Andirik (locum),
+46 8 503 302 57
josef.andirik@systembolaget.se

Anders Barrén (locum),
+46 8 503 311 25
anders.barren@systembolaget.se

David Benge,
+46 8 503 303 87
david.benge@systembolaget.se

Sebastian Braun,
+46 8 503 325 82
sebastian.braun@systembolaget.se

David Jean,
+46 8 503 303 95
david.jean@systembolaget.se

Johan Larsson,
+46 8 503 305 66
johan.larsson@systembolaget.se

Jens Lindberg (vikarie),
+46 8 503 325 80
jens.lindberg@systembolaget.se

Magnus Lindblom,
+46 8 503 325 85
magnus.lindblom@systembolaget.se

Göran Klintberg
(project assignment until 31 Aug. 2013)

Gad Pettersson
(project assignment until 31 Aug. 2013)

Assistant Purchasers

The Assistant Purchasers should primarily be contacted via assisterandeinkopare@systembolaget.se or tel. +46 8 503 303 27

Linnéa Abramsson,
+46 8 503 304 57
linnea.abramsson@systembolaget.se

Staffan Adin (vikarie),
+46 8 503 303 71
staffan.adin@systembolaget.se

Emelie Westrup (vikarie),
+46 8 503 327 16
emelie.westrup@systembolaget.se