

# Industry Overview & Sales Excellence

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***US ROUTE TO MARKET***

***US SALES MACHINE***

***PEOPLE***



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***PEOPLE***



# We have the best RTM in the US

## OVERVIEW

**500+** wholesalers

**44,500** total whlsr personnel

**27,000** total sales people ...

**17,500** sales reps

**70** share of case on displays

**11,000** total trucks on the street every day

## EXAMPLES

Bud Light Platinum **95%**  
distribution in **4** weeks

Cran-Brrr-Rita ... **0 to 80%**  
distribution in our largest  
retailer in just **4** days!





# Need for change ...

## The US Market is Very Complex

50 'Countries' within a Country



500+ Wholesalers



Diverse Brand & SKU Portfolio



500,000 Retail Accounts



Competing in all Segments

... across 10 Channels

Diverse Shopper Profiles



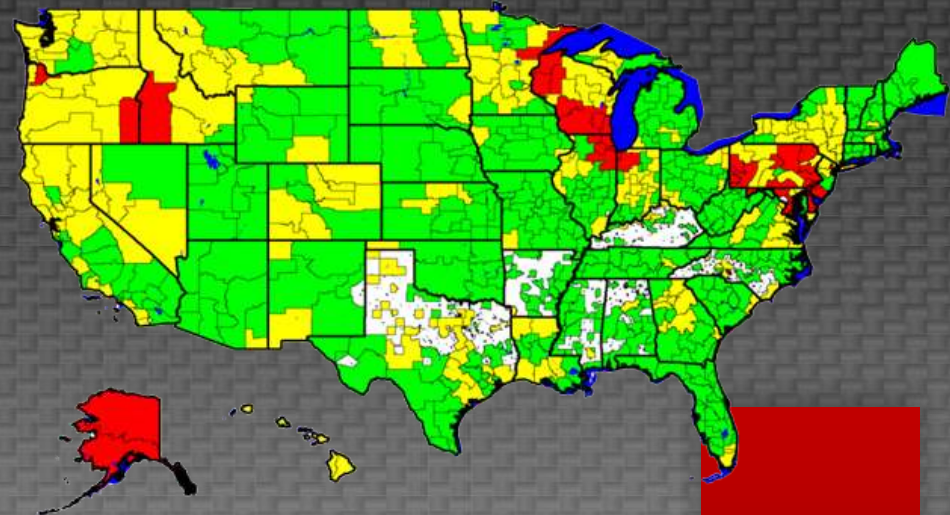
27,000+ Sales Force



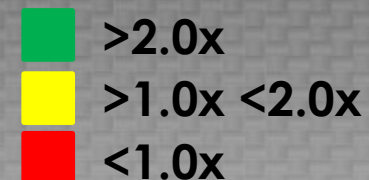
Diverse Retail Environments

## The Competitive Environment is Changing

- MillerCoors JV formed in 2008
- Accelerated consolidation in MC whlsr system
- Places ABI at a local disadvantage



Relative size of ABI wholesaler to local market competitive wholesaler



500  
Whlsrs

400  
Whlsrs

ABI

Miller Coors



# Our change principles ...

## STRONGER WHOLESALERS

- **500** equity wholesalers
- **Voluntary consolidation**
- **Alignment** program
- **Anchor** wholesalers
- **Re-investment** in the market
- 25 transactions since 2012

## BEST IN CLASS WODs

- **17** operations
- **8%** of volume
- Operations cost < independents
- **+0.5%** volume growth vs. peers
- **6/8** RVPs have WOD experience
- All trade programs **piloted** in WODs
- Pipeline for **people** talent

## RAISING THE BAR



# What we found



FROM:

- Set drawing
- Transactional
- Price to wholesalers
- Volume objectives
- Regional Autonomy
- Broad targeting
- Brand menus
- Poll data

**Category Leadership**

**Revenue Management**

**Sales Execution**

**Trade Marketing**

# What we are building



TO:

- Thought leadership
- Strategic work with retailers
- PTC/PROMO Excellence
- Top Line Objectives
- Steering from the center
- POC Level Planning
- Trade Programs
- Shopper Insights



The logo features a red banner with the words "SALES MACHINE" in white, bold, sans-serif capital letters. Above the banner is a gold, five-pointed star. The background of the entire slide is a close-up of a red and white striped fabric, possibly a flag, with a gold star and a "U.S.A." patch visible.

**SALES MACHINE**

**CATEGORY LEADERSHIP**

**REVENUE MANAGEMENT**

**SALES EXECUTION**

**TRADE MARKETING**

**U.S.A.**

The logo features a red banner with the words "SALES MACHINE" in white, bold, sans-serif capital letters. Above the banner is a gold star. The entire logo is set against a background of a red and white striped flag.

**SALES MACHINE**

**CATEGORY LEADERSHIP**

**REVENUE MANAGEMENT**

**SALES EXECUTION**

**TRADE MARKETING**

A red shield-shaped logo with the letters "U.S.A." in white, bold, sans-serif capital letters. The shield is set against a background of a red and white striped flag.

**U.S.A.**