

COMMUNITY
MANAGEMENT

TOGETHER

TRENDS

LINK

BEST

IDEAS

ENERGY

PEOPLE

TRENDS

CONCERTED

TEAM

SUCCESS

TRUST

EFFECTIVE

STRUCTURE

MODERN

UNIT

BUSINESS

TRADE

STRATEGY

COMPANY

TEAMWORK



Trends in Wine, Spirits, & Beer

Hawaii HLC Conference, October 2015

New Products, New Services, New Experiences

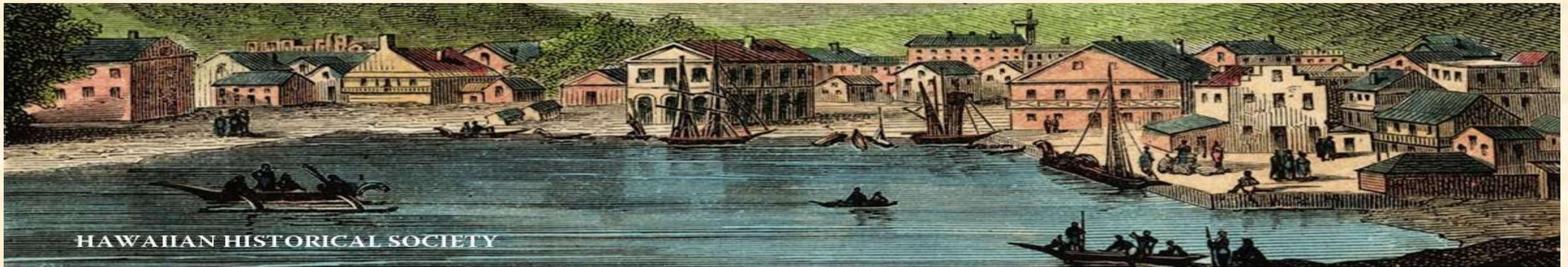
- History of Alcohol in Hawaii
- Trends in Beer, Wine, and Spirits
- Craft Beer and Local Beer Growth
- Spirits Summary – Whiskey Winners
- Sake and Shochu (Soju)



Ancient Hawaiian's brewed Okolehau

- *Made from root of ti plant, Hawaiian "moon-shine"*
- *Okolehau translates to "iron-butt" (for shape of iron brew pots)*
- *Exported since late 18th century , first by English seamen*



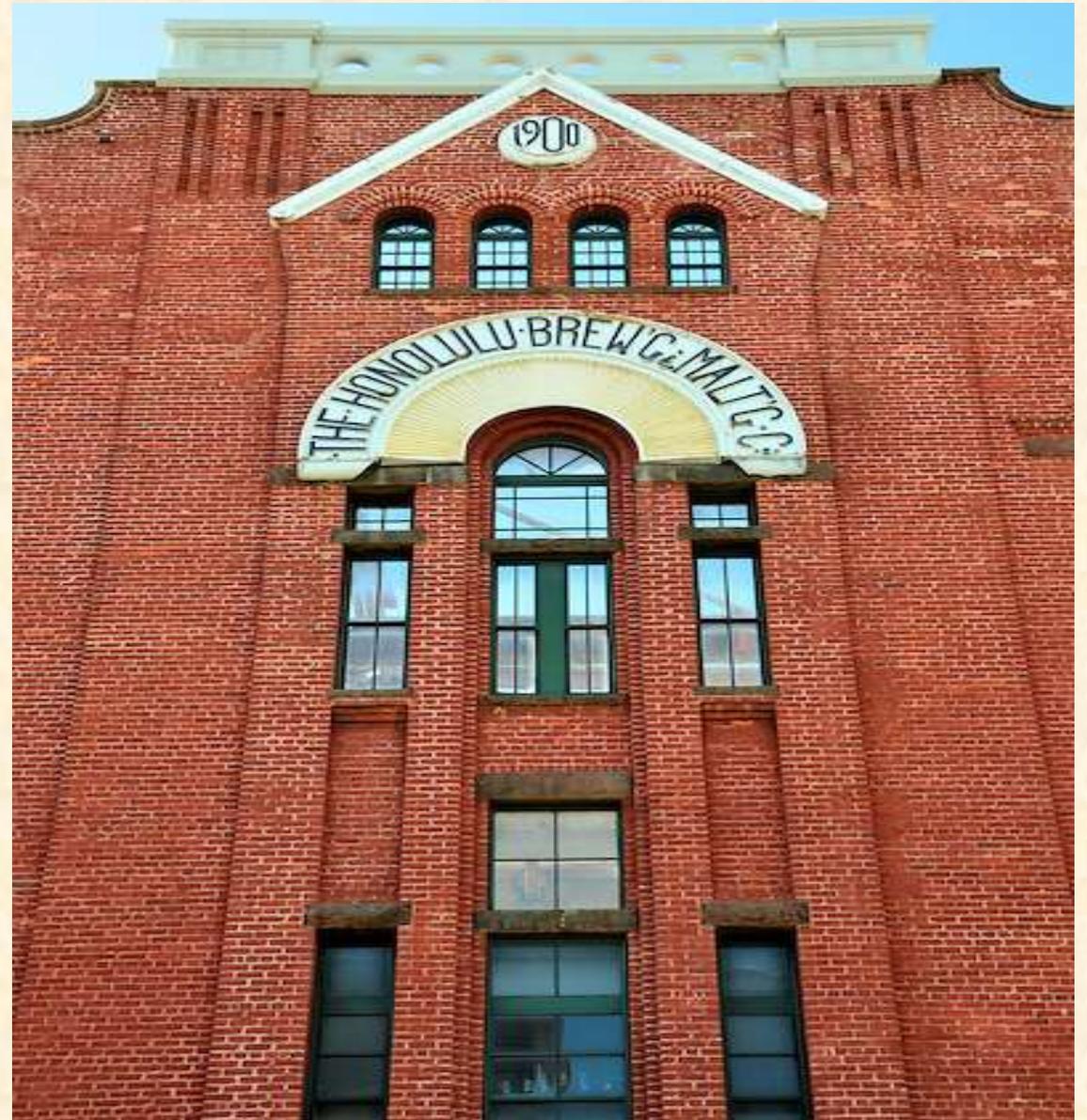


- Don Francisco de Paula Marin, the early Spanish settler in Honolulu, was the first Island resident known to have brewed beer.
- In his journal entries for both February 2, 1812, and December 7, 1815, Marin recorded making "a barrel of beer," apparently for sale.

LOYAL AMERICANS
DESIROUS OF CELEBRATING THE
"Glorious Fourth!"
As they should, will please leave their orders for
Lager Beer!
In the HAWAIIAN BREWERY ORDER BOX, Post Office
Building previous to 12 M. of **TUESDAY**—"One
Country, one People, one **LAGER.**"
It **PER ORDER.**

Hawaii's first brewery opened in 1854.

- Hawaii's first full-scale brewery appeared in April 15, 1854.
- *The Polynesian*, a weekly newspaper, carried an unchanging one-column advertisement. Titled "**Honolulu Brewery.—Genuine Beer,**" the ad stated: "The undersigned, having established a Brewery in Honolulu, Fort street, opposite the French Hotel, are now prepared to supply families, hotels, boardinghouses and bar rooms, in bottles or in kegs. This beer is made of barley and hops only,—contains no alcohol. . . ."
- On October 28, 1854, the ad was retitled "Honolulu Brewery Malt Beer," and the reference to its non-alcoholic contents was deleted



The Royal Brewery, 553 South Queen Street

In 1899, a New York architect designed a brewery building to the specifications of the **Honolulu Brewing and Malt company**.

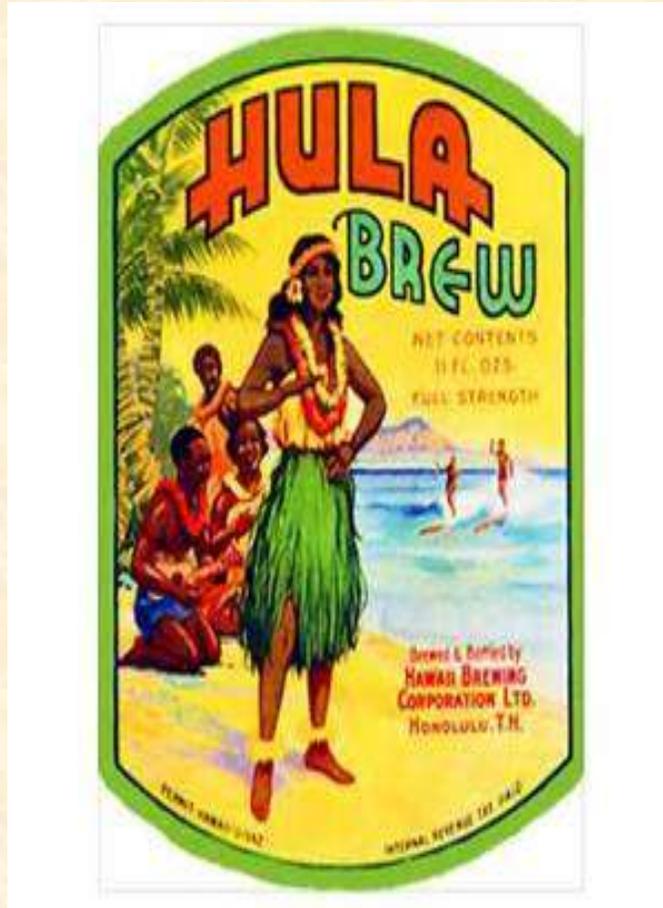
The four story building on Queen Street is of grand proportion and a rare architectural statement with its three-story brick arches, corbels, and intricate patterns reflecting the finest masonry craftsmanship of the time.

The Brewery building is a landmark of the downtown area and is the only building of its type in the state.

Though beer has not been produced in the building since 1960, the building stands as a unique structure in Hawaii.



Don Pacarro in Kalihi brewed "Steam beer" in 1888



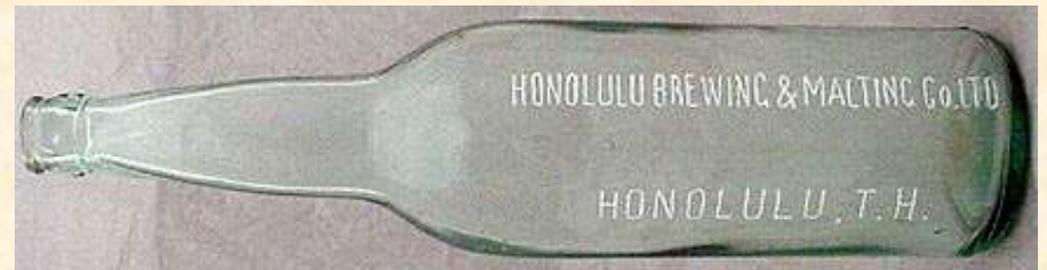
Other breweries eventually followed.

The National Brewery Company in **Kalihi** produced steam beer from January 1888 until about 1893.

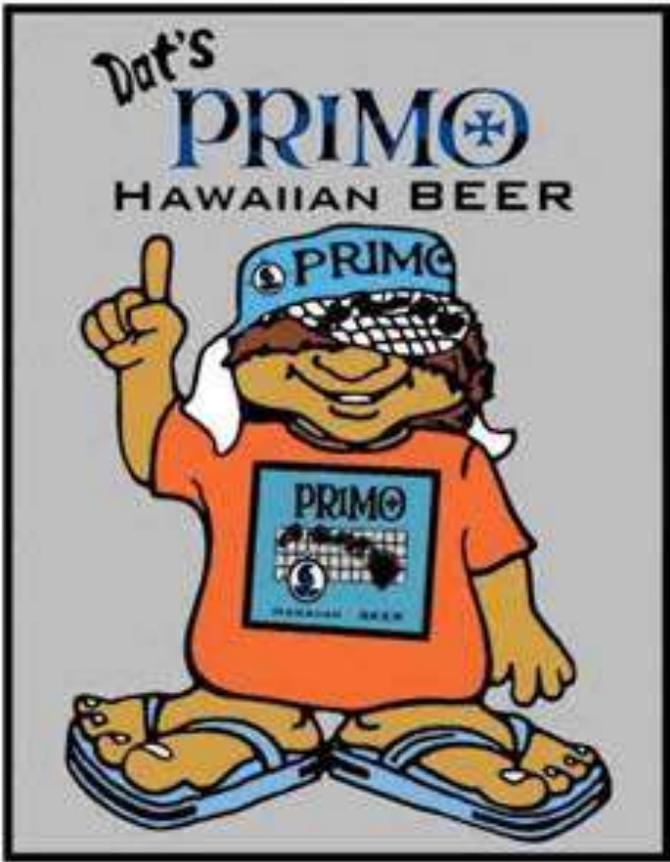
The Honolulu Brewing and Malting Co., Ltd., makers of Primo Beer, commenced production on February 13, 1901, and continued until the arrival of Prohibition.

Renamed, the company resumed brewing in 1934 and finally discontinued its Hawaiian operations in 1979.

Other beer manufacturers have included the makers of Royal Beer and, more recently, several microbreweries.



First modern beer, "Primo" (est 1901).



Craft beer expansion in Hawaii since mid 1990's.



- *Hawaiian Craft Wine and Spirits also growing aggressively!*

2014-15 Summary of Alcohol in the U.S.

- Sales in 2014

- Beer \$103B

- Spirits \$77B

- Wine \$31B



- Aggressive introduction of new products in 2014

- 10,441 new product introductions

- 4,622 new wine products

Alcohol growing faster than rest of store....

- Craft beer driving growth in Beer.
 - Local is the new “organic”
- Whiskey driving growth in Spirits.
 - Bourbon, Rye, & Irish double digit growth
 - Flavored whiskeys (Fireball, Apple, Honey...)
- Wine sales growth driven by Red Blends
 - Red wine (46%) noses out white wine (44%)
 - Sparkling (10%) bubbling up driven by Prosecco

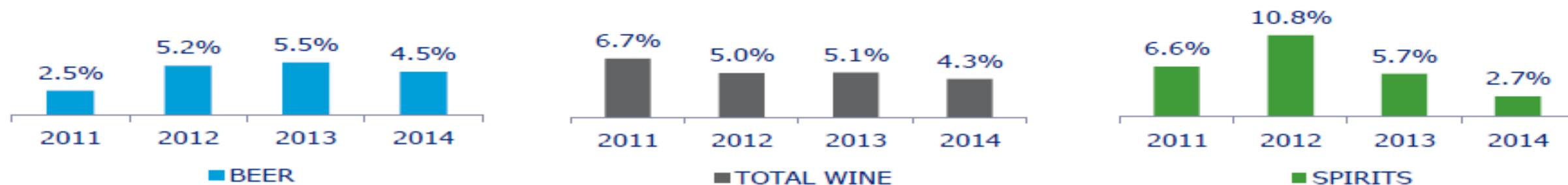


BEVERAGE ALCOHOL CATEGORY FOUR-YEAR SALES TRENDS

TOTAL U.S. MULTI-OUTLET (MULO)

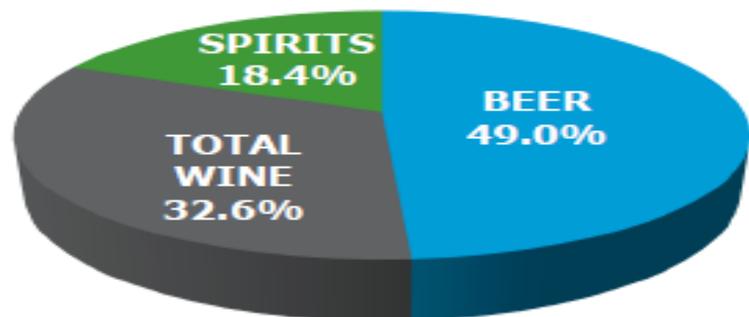
- Beer Dollar Sales trends outpaced both Wine and Spirits sales trends for the first time since 2008.

Dollar Trends

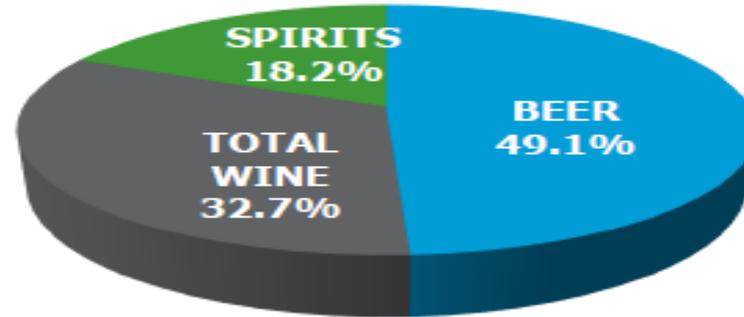


Note: Spirits sold in WA State starting in 2012

Dollar Share of Bev Alc 2013



Dollar Share of Bev Alc 2014



- *The U.S. is the largest wine market in the world with 19 consecutive years of volume growth.*
- *Wine sales increased 2% from the previous year to a new record of 360.1 million 9-liter cases*
- *Estimated retail value of \$34.6 billion*



207.7 million cases of California wine account for a 58 percent share of U.S. (\$22B)

Imported Wine shipments to the United States market increased nearly 50% since 2001.

2014 Wine Report Card Nothing to Whine about

- iGeneration (born 1995-2015), 60 Million strong will bring unprecedented wine experimentation
- Women rule! Female wine drinkers, at 54%, now outnumber men.
- Women driving whiskey trends.



2014 Wine Report Card, Red Wine & Beer up

- *Red blends growing at 15%.*
- *Beer & Wine behavior – 69% of wine drinkers now also choose beer (craft up 15%)*
- *Social media on rise... 64% of millennials, & 40% of Gen X use social media to select wine.*
- *Wine culture evolving, but still seen as "exotic".*



Diversity Driving New Consumers

- "The amazing diversity of choices and exciting new offerings are attracting new consumers and boosting consumption .
- Wine also pairs well with food, leading to larger, more profitable shopping baskets."



- *Chardonnay remained the most popular varietal with a 21% percent share.*
- *Cabernet Sauvignon with 12%, Merlot 8%, and Pinot Grigio/Gris holding at 8%.*
- *Domestic red blends/sweet red wines, which were up 22%.*

Sparkling wine and champagne, shipments reached 17.7 million cases in 2012, up 2%



- *The largest percentage gains came from Muscat/Moscato, up 33%.*



Wine and Mead in Hawaii



Don Francisco de Paula Marin plants first vineyard in 1799.

Don Francisco de Paula Marin was a productive man. He arrived in Hawaii in 1793 after deserting a Spanish naval ship in the Northwest. Marin was an important figure in the beginning years of the Hawaiian kingdom, serving as Kamehameha I's business advisor, bookkeeper, sometime physician, and interpreter.

Within Marin's gardens were onion, pineapple, horseradish, cabbage, asparagus, corn, chili pepper, lime, lemon, orange, coffee, carrot, plum, fig, mango, lettuce, olive, avocado, parsley, pea, guava, apricot, peach, pear, apple, papaya, eggplant, potato, tea, cotton, and cocoa. ***Perhaps his most famous plantings were those of his vineyards from which he produced the first wine in Hawaii. Vineyard Boulevard was named so because it cut through his orchard.***



Marin also pioneered beer brewing in Honolulu in as early as 1812.

Don Francisco de Paula Marín
at Hale Kauila
with the royal court receiving
the French
Captain Du
Petit Thouars,
1837.



2014 Spirits Report Card, Bottoms Up!



- *Whiskey leads sales volume.*
 - *Bourbon, Rye, & Irish double digit growth*
 - *Flavored whiskeys (Fireball, Apple, Honey...)*
- *Spirited Women – women drinking more spirits.*
 - *Women driving whiskey trends*



2014 showed SPIRITED RESULTS!

Overall US retail sales (all spirits) were estimated at \$66 billion.

*American distilled spirits grew 4.4 % to \$22.2B last year.
(dollars)*

Total U.S. growth (cases) was up 1.9 % to about 206 million cases.

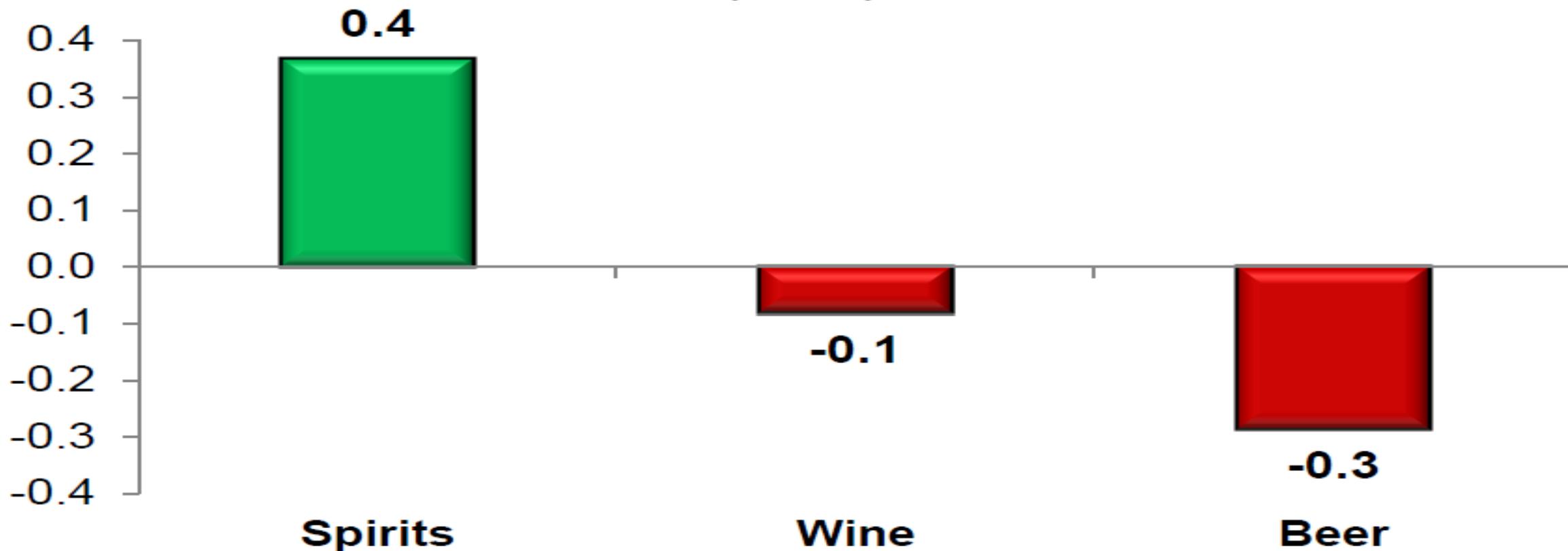
*U.S. bourbon & Tennessee whiskey sold \$2.4 billion.
Sales up nearly 7 percent to 18 million cases.*

*Irish whiskey up 17.5 % to 2.5 million cases last year
Single Malt Scotch rose 11.6 % 1.8 million cases.*



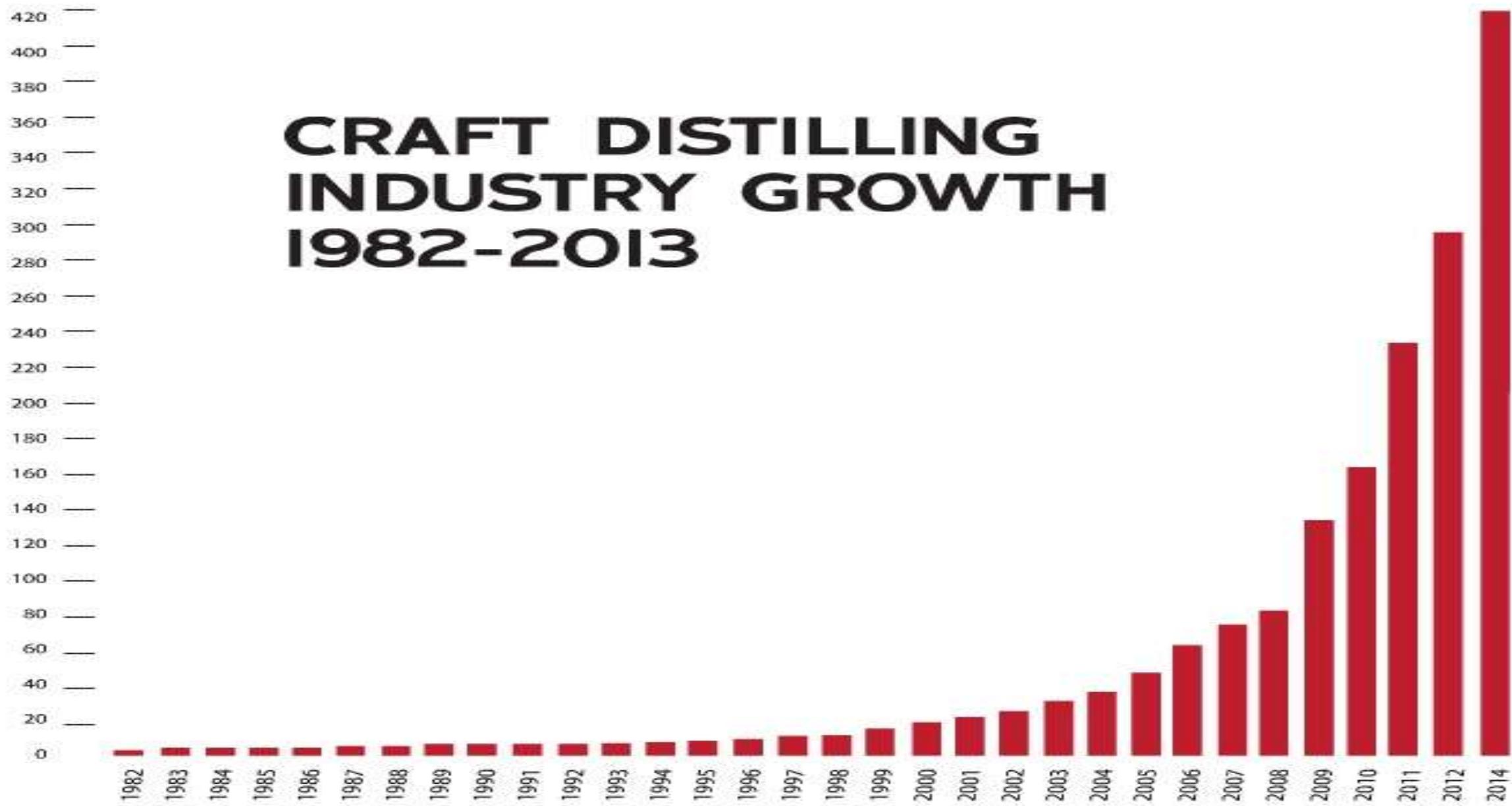
SPIRITS TOOK SHARE FROM BEER, WHILE WINE SHARE WAS FLATTISH VERSUS THE PRIOR YEAR

Y/Y \$ Share Change in Alcoholic Beverage Mix (2014)



CRAFT DISTILLING INDUSTRY GROWTH 1982-2013

NUMBER OF DISTILLERIES



Craft Spirits in Hawaii



Farm to Bottle Oahu, Manulele Rum and Hawaiian Shochu Co



“LOCAL” SELLS.....

Bruno Mars teamed up with three rum aficionados, found legendary Master Blender Don Francisco "Pancho" Fernandez, who'd carved out a distillery from the jungles of Panama. Together they created SelvaRey Rum.

SelvaRey slogan...

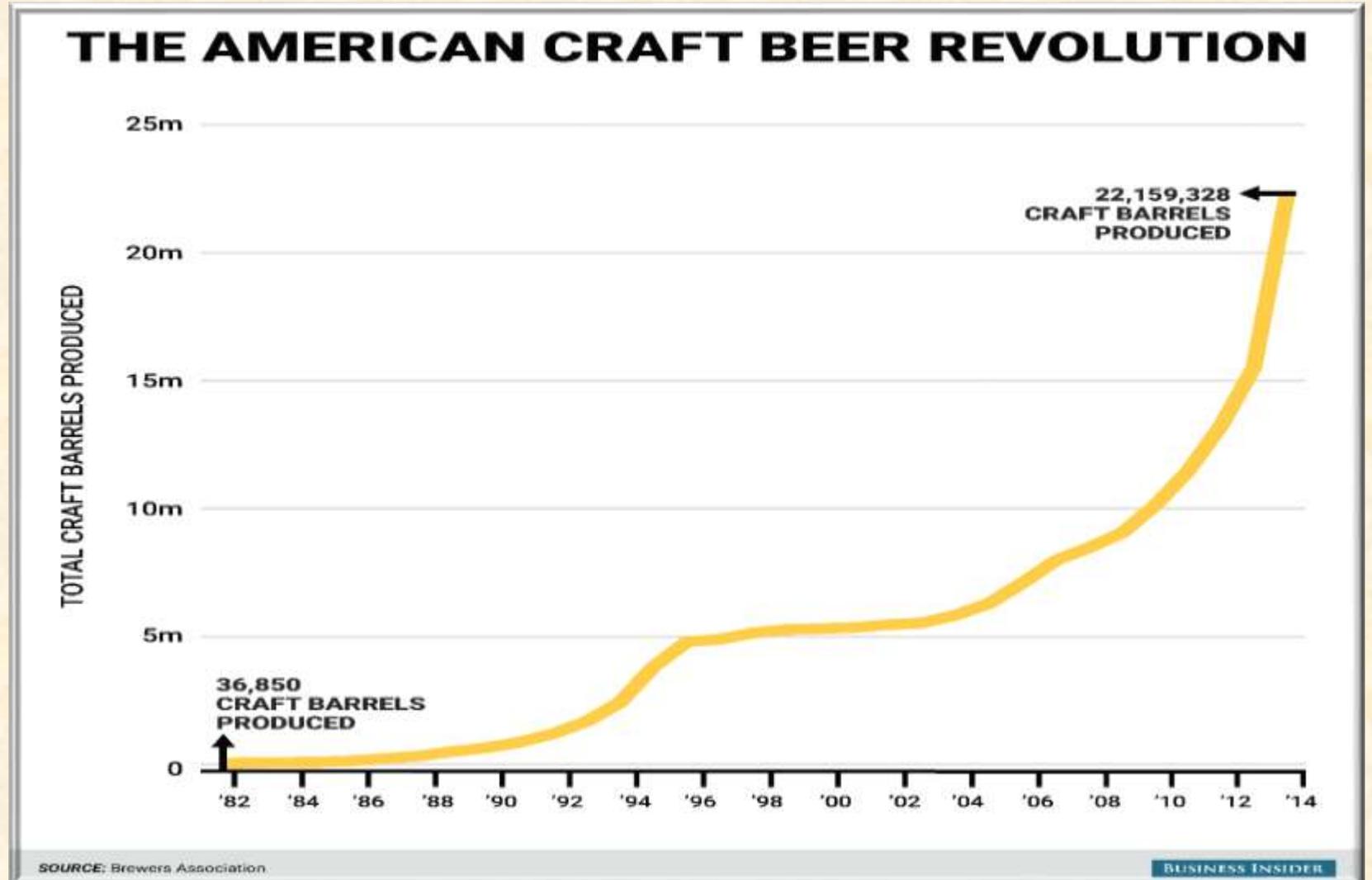
**“it's a jungle out there.
drink responsibly.”**





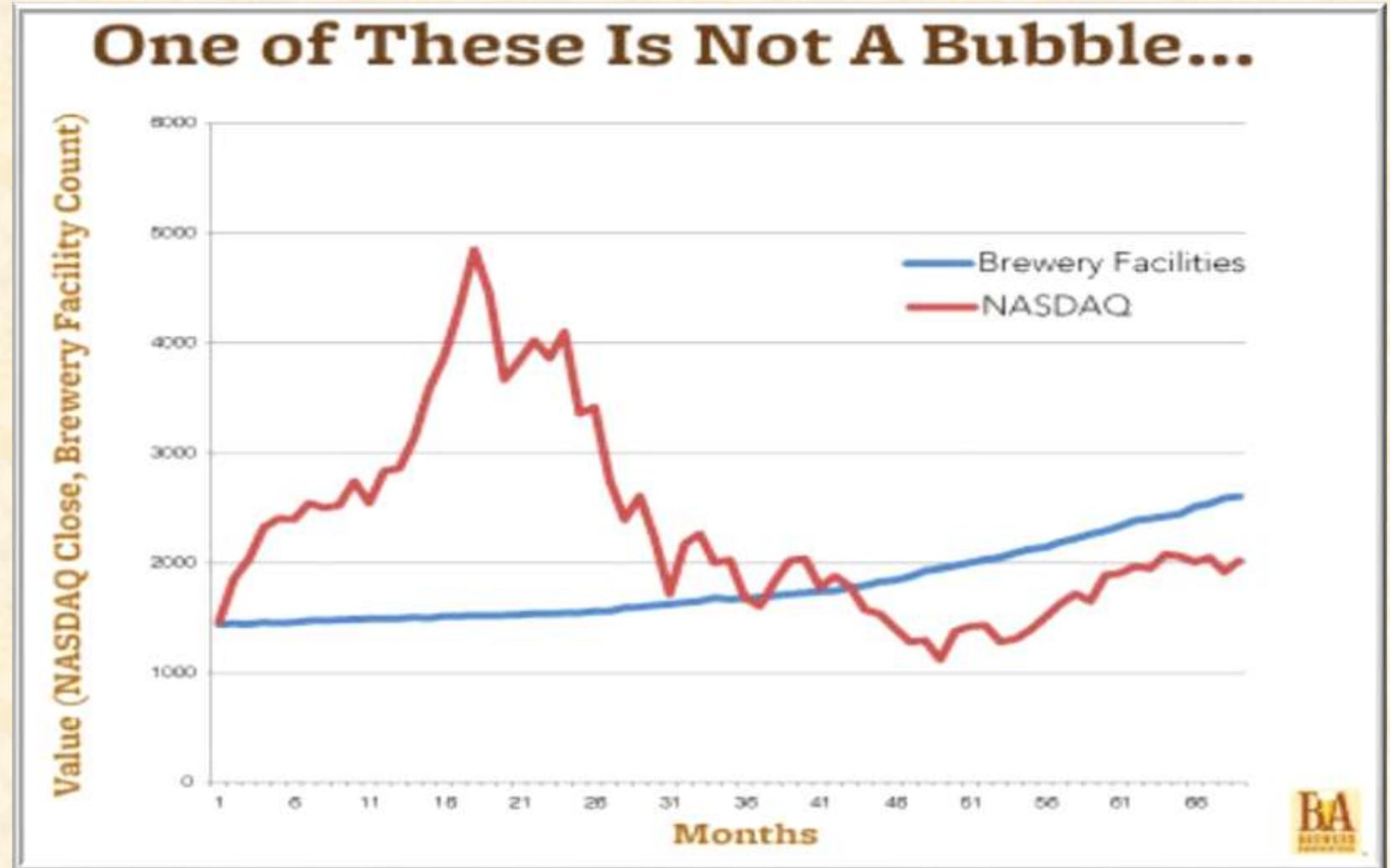
2014 BEER REPORT CARD, SALES BREWING WELL

- Beer sales trends outpaced both Wine & Spirits, first time since 2008.
- Best ever Craft Beer Intro led to record year for new Craft products



2014 BEER REPORT CARD, SALES BREWING WELL

- Big Beer repositioning to Craft Beer future.
 - AB buying up Craft – Elysian & 10 Barrel
 - Heineken buying 50% of Lagunitas



- The term “craft beer” has been meant to describe beer from brewers that are small, independent, traditional, and **LOCAL**

CRAFT BREWER DEFINED

An American craft brewer is small, independent and traditional.

Small = Annual production of 6 million barrels of beer or less (approximately 3 percent of U.S. annual sales). Beer production is attributed to the rules of alternating proprietorships.

Independent = Less than 25 percent of the craft brewery is owned or controlled (or equivalent economic interest) by an alcoholic beverage industry member that is not itself a craft brewer.

Traditional = A brewer that has a majority of its total beverage alcohol volume in beers whose flavor derives from traditional or innovative brewing ingredients and their fermentation. Flavored malt beverages (FMBs) are not considered beers.

1.5 breweries opening every day during 2014

Total Craft Breweries in U.S.

1,871 MICROBREWERIES

1,412 BREWPUBS

135 REGIONAL BREWERIES

3,418 TOTAL CRAFT BREWERIES

MICRO

BREW PUB

REGIONAL

STATE OF THE INDUSTRY | BREWERS ASSOCIATION

2014 Was Another Great Year For U.S. Craft Beer

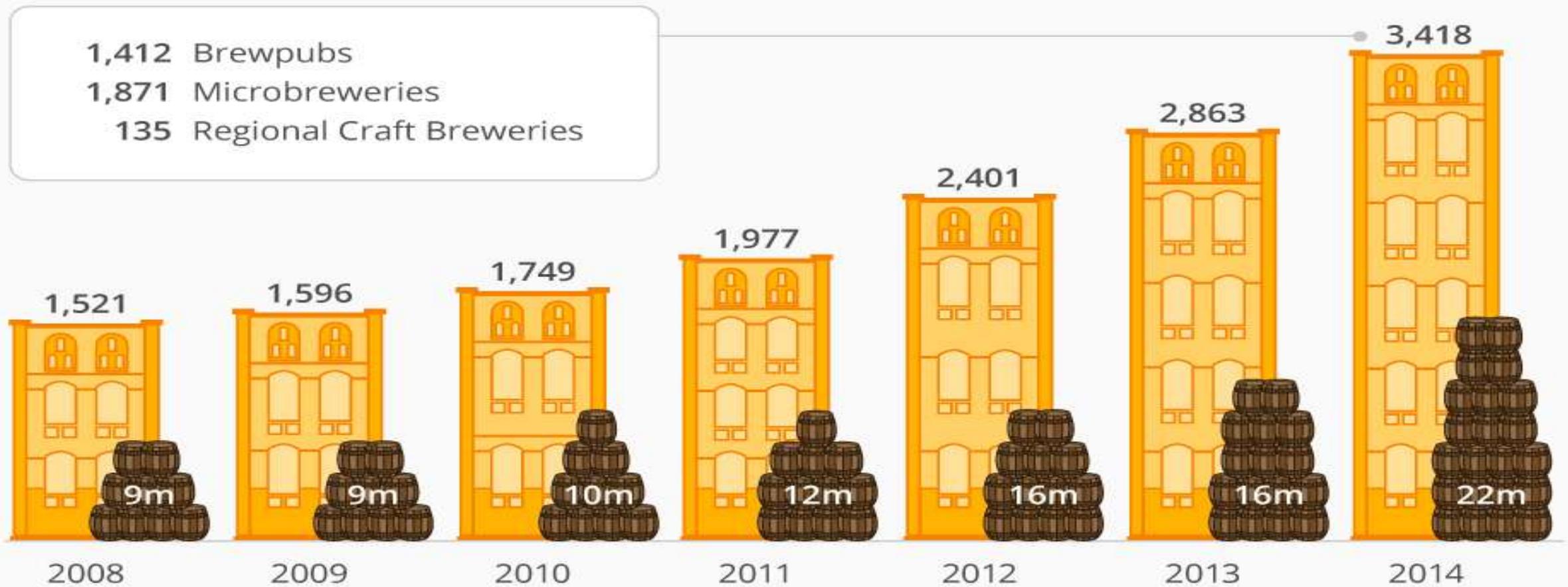
Craft beer breweries and barrels produced in the U.S. from 2008 to 2014



Operating craft breweries



Barrels of craft beer produced



1,412 Brewpubs
1,871 Microbreweries
135 Regional Craft Breweries

2014 BEER REPORT CARD, SALES BREWING WELL

- Craft can sales increase dramatically.



U.S. BEER SALES VOLUME GROWTH 2014

**OVERALL
BEER**
0.5%
197,124,407 bbls

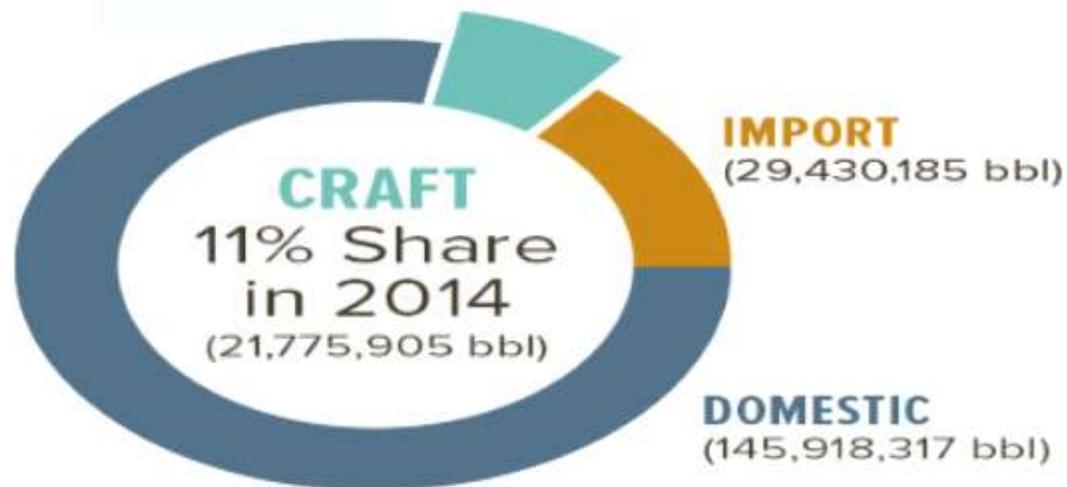
17.6%
CRAFT
21,775,905 bbls

**IMPORT
BEER**
6.9%
29,430,185 bbls

36%
**EXPORT
CRAFT
BEER**
383,422 bbls

**OVERALL BEER MARKET
\$101.5 BILLION**

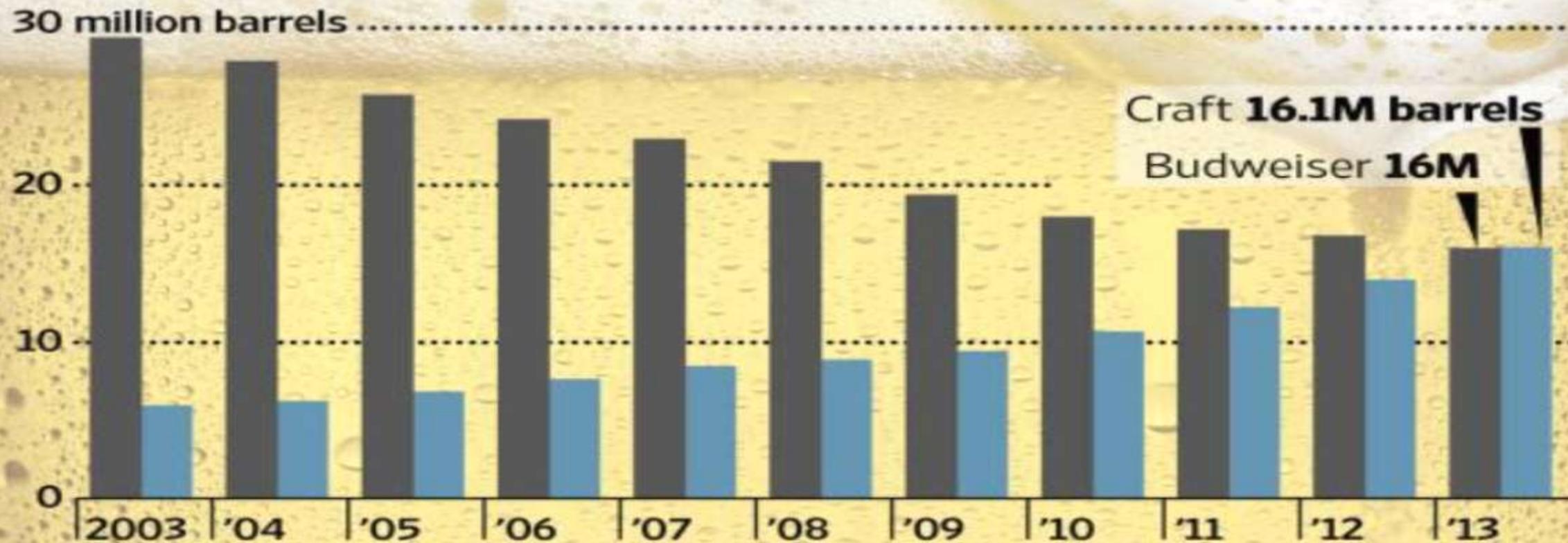
**CRAFT BEER MARKET
\$19.6 BILLION**
22% DOLLAR SALES GROWTH



Craft beer sales pass #1 Budweiser

Battle of the Brew

Craft beer's growth pushes it past Budweiser in total barrels shipped.



Source: Beer Marketer's Insights; iStock (photo)

The Wall Street Journal



ROGUE



USA Today's Top 15 Craft Beer Breweries in the USA

1. **Dogfish Head** | Milton, Del.
2. **Stone Brewing Company** | Escondido, Calif.
3. **Boulevard Brewing Company** | Kansas City, Mo.
4. **Founders Brewing Company** | Grand Rapids, Mich.
5. **Cigar City Brewing Company** | Tampa, Fla. *
6. **New Belgium Brewing Company** | Fort Collins, Colo.
7. **Lagunitas Brewing Company** | Petaluma, Calif.
8. **Bell's Brewery** | Kalamazoo, Mich.
9. **Russian River Brewing Company** | Santa Rosa, Calif. *
10. **Sierra Nevada** | Chico, Calif.
11. **Odell Brewing Company** | Fort Collins, Colo. *
12. **Three Floyds Brewing Company** | Munster, Ind. *
13. **Avery Brewing Co.** | Boulder, Colo. *
14. **Oskar Blues** | Lyons, Colo. *
15. **Rogue Ales** | Portland, Ore.

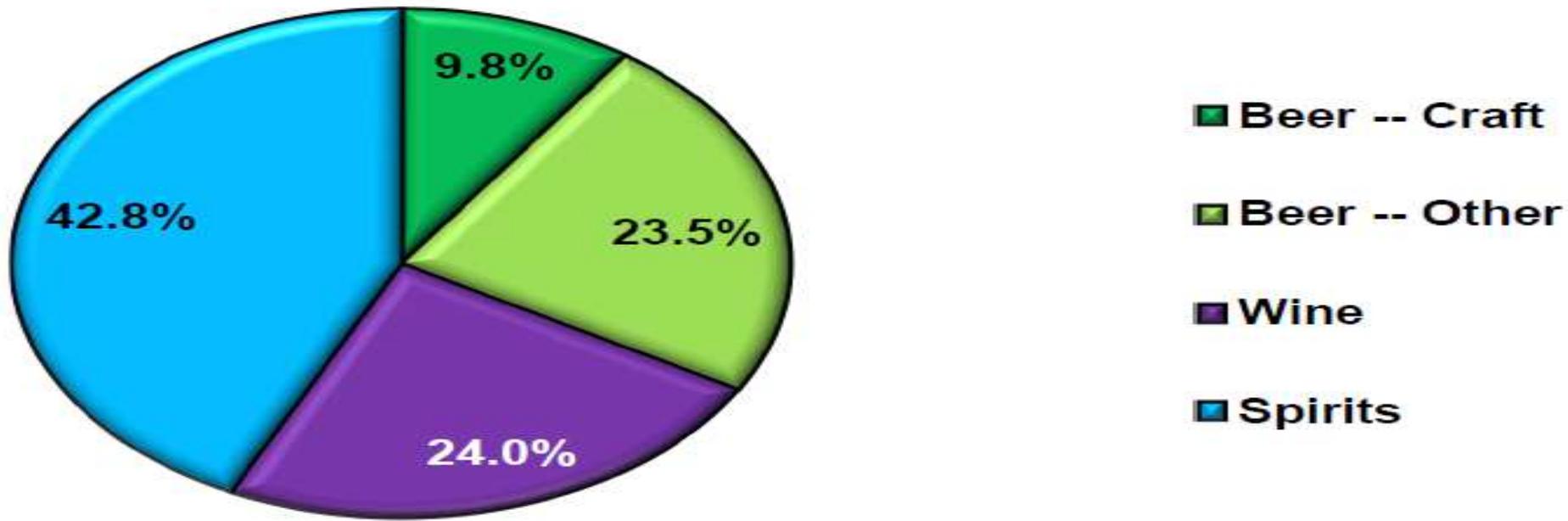
* Not distributed by KDI or available for purchase in the State of Illinois.

August 26, 2013



CRAFT BEER MAKES UP NEARLY 10% OF TOTAL BEVERAGE ALCOHOL \$ SALES AND ~27% OF TOTAL BEER \$ SALES

Category Mix (by Retail \$ Sales) -- Alcoholic Beverages (2014)

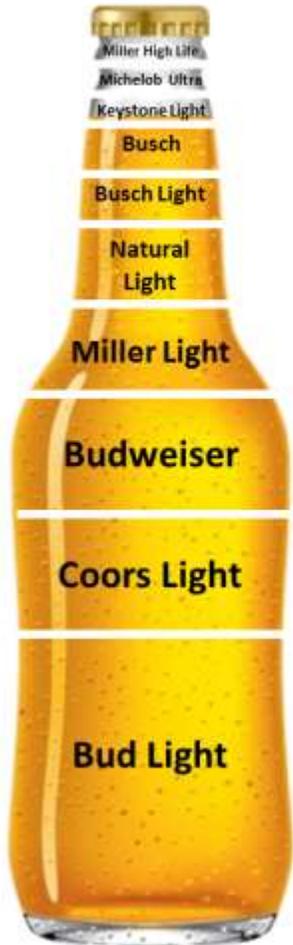


GuestMetrics data reflects new definition of Total BA Craft which includes Yuengling



U.S. Beer Sales – Top 10 Brands by Source (Volume by case sales, 2013)

DOMESTIC MACRO (1.2B cases)



Top 10 brands sell 73% of total

Note: total Import sells about half of Bud Light, and total Craft sells about a third of Import; top 10 brands are identified by dollar sales ranking but share is presented by case volume

IMPORT (160M cases) ~7.5x smaller than Domestic



Top 10 brands sell 80% of total

CRAFT (55M cases) ~3x smaller than Import



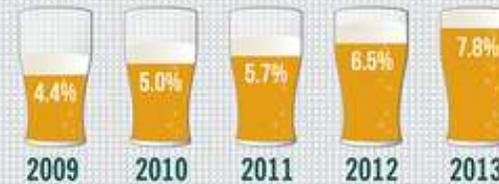
Top 10 brands sell 58% of total



Source: Beverage Digest, The Atlantic

CRAFT BEER GROWING FASTEST OF ALL ALCOHOL BEVERAGES

Volume Share for Craft Brewers



Craft Retail Dollar Value Growth



\$14.3 BILLION

20% GROWTH OVER 2012

Craft Dollar Share = 14.3%

{ Total U.S. beer market retail dollar value \$100 billion }

U.S. Operating Breweries



15%

Increase over 2012



TOP 15 BEVERAGE ALCOHOL SALES GROWTH SEGMENTS

ACTUAL DOLLAR SALES CHANGE VS YEAR AGO

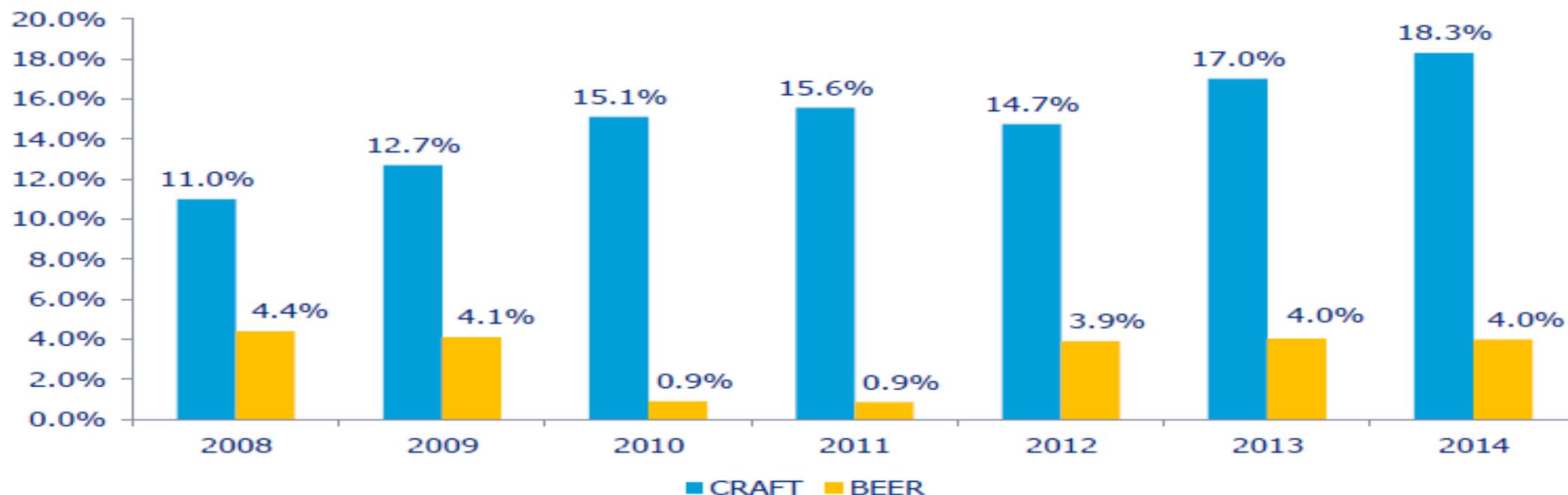
- For the second straight year, Craft Beer led all Beverage Alcohol Segments in Dollar Sales Growth in Total US MULO

		Dollar Sales % Chg YA	Dollar Sales
CRAFT - BEER	\$269,541,064	18.5%	\$1,729,698,215
(\$11.00-\$14.99) TABLE WINE	\$163,549,860	15.1%	\$1,246,595,717
(\$8.00-\$10.99) TABLE WINE	\$140,013,294	6.7%	\$2,224,762,394
WHISKEY	\$127,677,286	9.1%	\$1,534,594,707
IMPORT - BEER	\$121,327,214	4.7%	\$2,683,566,938
SUPER PREMIUM - BEER	\$100,501,844	7.0%	\$1,528,782,507
CIDER - BEER	\$99,803,099	57.9%	\$272,133,422
(\$20.00+) TABLE WINE	\$50,653,788	16.3%	\$362,347,763
(\$3.50-\$4.99) BOX TABLE WINE	\$47,898,870	20.6%	\$280,854,342
PAB's - BEER	\$43,999,478	7.3%	\$643,226,253
(\$15.00-\$19.99) TABLE WINE	\$38,968,528	9.0%	\$470,169,410
VODKA	\$38,052,972	2.7%	\$1,460,740,051
(\$8.00 - \$12.99) SPARKLING WINE	\$32,703,399	9.5%	\$378,631,270
(\$13.00 - \$17.99) SPARKLING WINE	\$21,144,617	21.1%	\$121,273,488
COGNAC	\$12,199,582	14.7%	\$95,295,960

BEER CATEGORY & CRAFT SEGMENT HISTORICAL DOLLAR SALES TRENDS TOTAL U.S. SUPERMARKETS

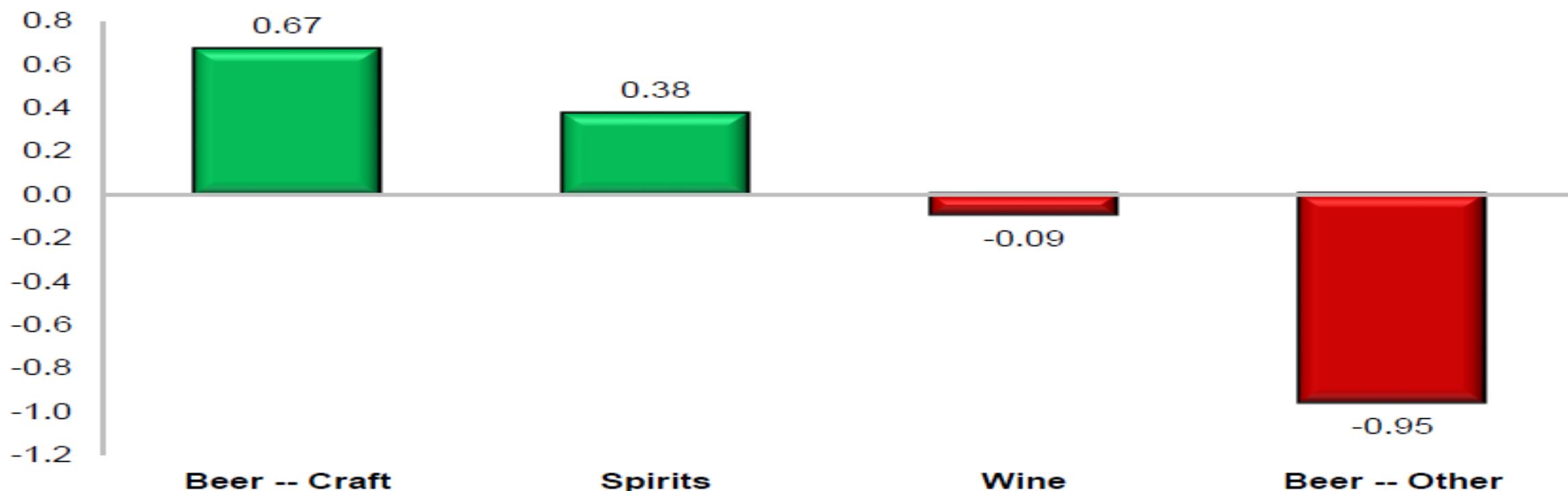
- Craft's momentum continued as it achieved its highest positive sales percent increase vs a prior year in 2014

Dollar Sales % Chg YA



HOWEVER... WHILE OVERALL BEER CONTINUES TO LOSE SHARE, CRAFT BEER CONTINUES TO AGGRESSIVELY INCREASE ITS SHARE OF TBA DOLLAR SALES AND IS NEARLY 2X THE GAINS ACHIEVED BY SPIRITS DURING 2014

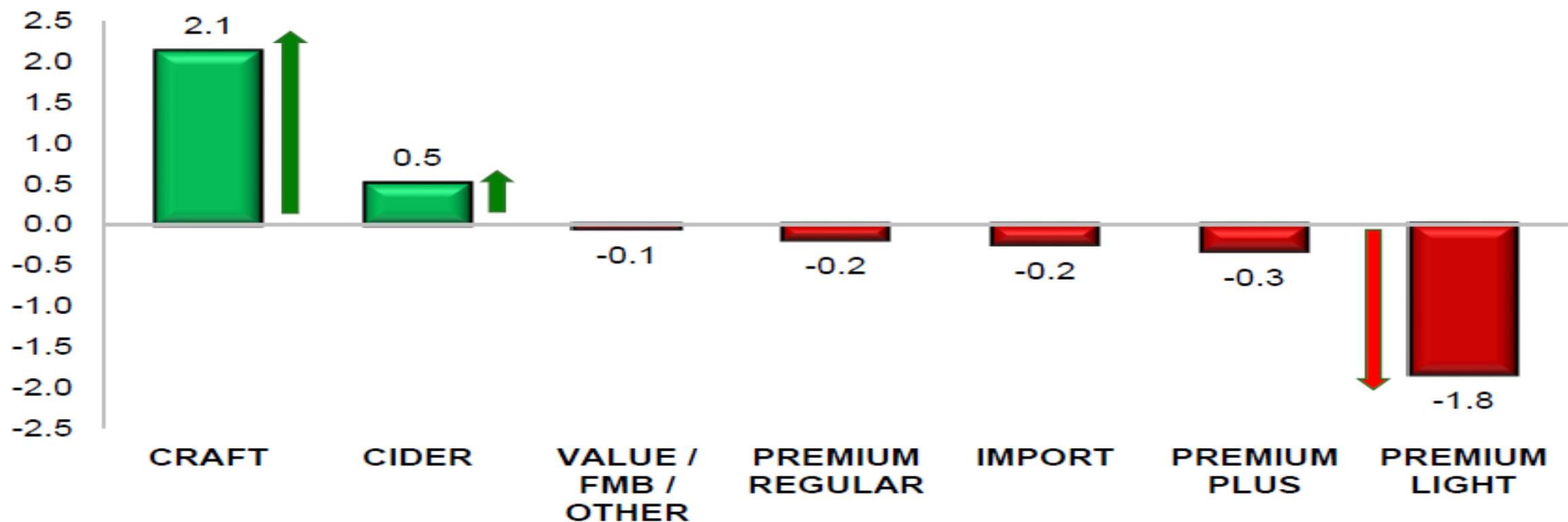
**Y/Y Change Alcohol Sales Mix (points)
(2014 vs. 2013)**



GuestMetrics data reflects new definition of Total BA Craft which includes Yuengling

CRAFT AND CIDER SHARE GAINS HAVE COME PRIMARILY AT THE EXPENSE OF PREMIUM LIGHTS

Y/Y Change in Beer Volume Share -- by Segment (2014 vs. 2013)



GuestMetrics data reflects new definition of Total BA Craft which includes Yuengling

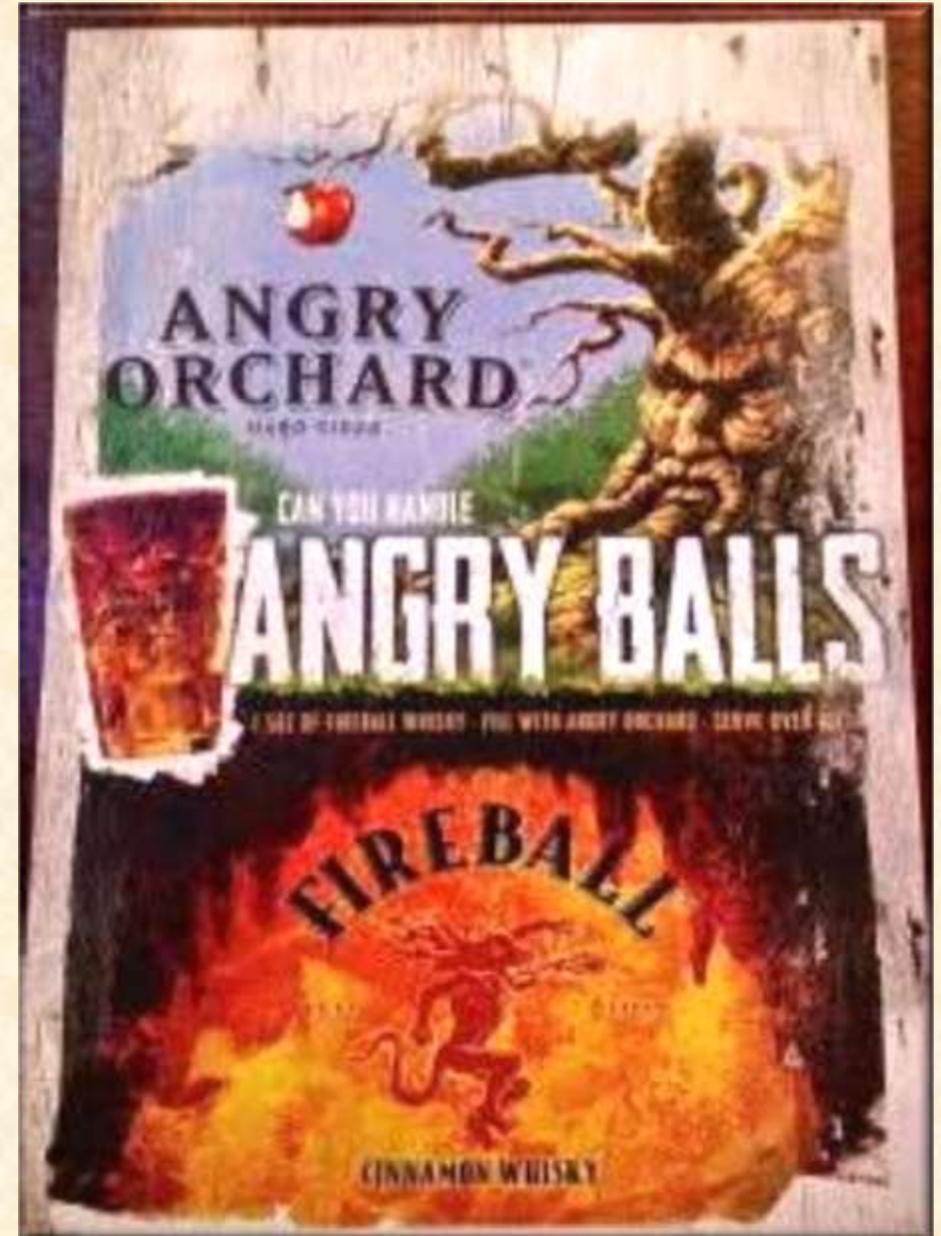
Explosion of Craft Beers and Flavored Spirits equaled new cocktails and huge sales growth.

RECIPE FOR SALES SUCCESS...

Take the #1 Craft Cider – **ANGRY ORCHARD** Cider (Sam Adams)

and mix with the #2 Flavored Whiskey – **FIREBALL** cinnamon whiskey.

Innovation Driving Sales!



Explosion of new flavors...Hard Root Beer hits the scene ...HARD!

RECIPE FOR SALES SUCCESS...

Craft beverage

Balanced

Quality

Familiar yet new
flavor



CRAFT BEER in Hawaii

- Kona Brewing Company was started in the spring of 1994 by father and son team Cameron Healy and Spoon Khalsa.
- Originally from Oregon, the pair saw a need to create fresh, locally made brews with the same spirit and passion for quality that existed in the Pacific Northwest.
- Because of their great love for the Big Island, the Kona Coast in particular, they wanted to build a business that would benefit the island and would not harm the pristine environment.
- The happy result of this dream is the brewery in Kailua-Kona



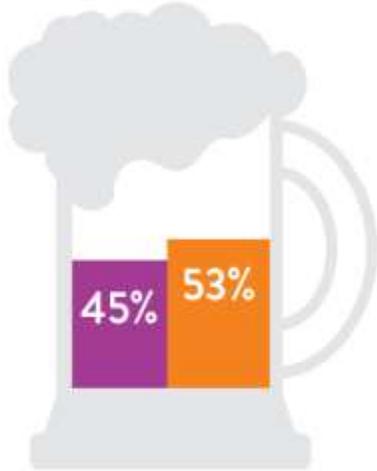
Local leads the way

THE IMPORTANCE OF LOCAL

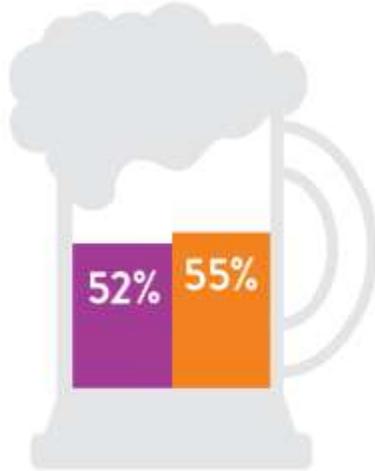


All beer drinkers like local, but it's most important to young craft beer drinkers

ALL BEER DRINKERS



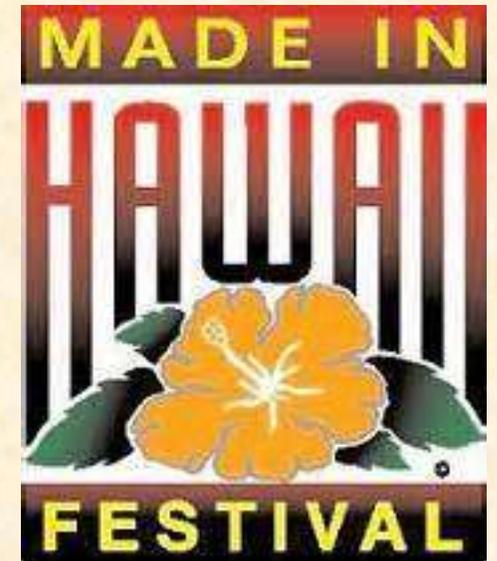
CRAFT BEER DRINKERS



● 21+ YEAR OLDS ● 21-34 YEAR OLDS

Read as: 45% of all beer drinkers 21 and older believe local is an important factor in the beers they purchase.
Source: Nielsen Total U.S. All Outlets 52 weeks ending Jan. 3, 2015.

Copyright © 2015 The Nielsen Company



Local brew from every island....



Brewed with Aloha



MAUI BREWING CO.



Bikini Blonde Lager

WHAT THE SAILORS REALLY
COME TO SHORE FOR...

MAUI BREWING CO.



BIG SWELL IPA

BIG, HOPPY, BOLD, SMOOTH AND HOPPY...
DID WE MENTION HOPPY?

MAUI
TOP 10

Beers Made in Hawaii

	BEER	BREWERY	ISLAND	TASTES	ABV% <small>(alcohol by volume)</small>	IBU <small>(International Bitterness Unit)</small>
1	Bikini Blonde	Maui Brewing Co.		Light, Refreshing, Smooth	5.1	18
2	Big Swell IPA	Maui Brewing Co.		Big, Hoppy, Bold	6.8	82
3	Hula Hefeweizen	Kona Brewing Co.		Banana/Herbal Flavors & Aroma	5.0	16
4	White Mountain Porter	Big Island Brewhaus		Hints of Chocolate & Hoppy Spice	5.7	40
5	Hapa Brown Ale	Hawaii Nui Brewing Co.		Light Toffee Aroma, Caramel Malt Flavor	6.4	33
6	Coconut Porter	Maui Brewing Co.		Flavors of Coconut, Chocolate & Coffee	6.0	30
7	Paniolo Pale Ale	Big Island Brewhaus		Smooth, Hoppy, Hints of Tropical Fruit	5.7	40
8	Mana Wheat	Maui Brewing Co.		Crisp, Refreshing, Hints of Pineapple	5.5	18
9	Kiawe Honey Porter	Aloha Beer Co.		Light Honey & Roasted Chocolate	6.0	26
10	Southern Cross	Hawaii Nui Brewing Co.		Jackfruit Citrus, Toffee & Caramel	8.3	58

Wait, Wait, we have more!

- *Young's Market- Hawaii will now present:*
- *Trends in Spirits – Whiskey Winners*
 - *Why Rye?*
 - *Fireball on fire!*
- *Emerging Sake and Shochu (Soju) –*
- *Sake and Shochu 101*
 - *Who is drinking Sake & Shochu?*

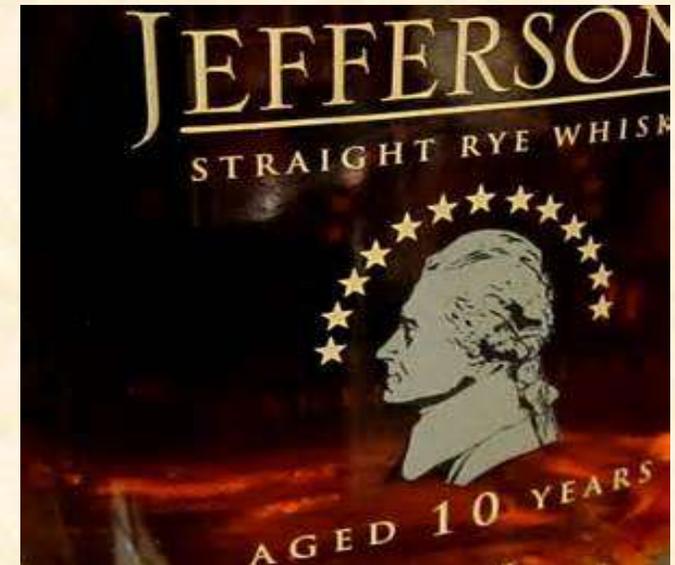
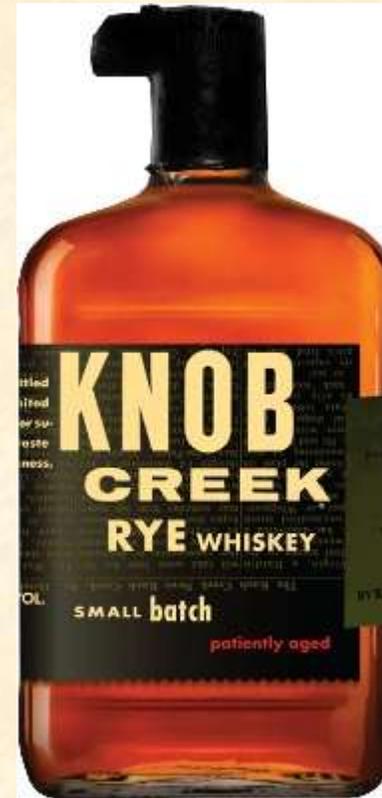


Whiskey/Bourbon Overview



Whiskey driving growth in Spirits.

- Bourbon, Rye, & Irish double digit growth
- Flavored whiskeys (Fireball, Apple, Honey...) driving new trial



Whiskey/Bourbon – Top 5

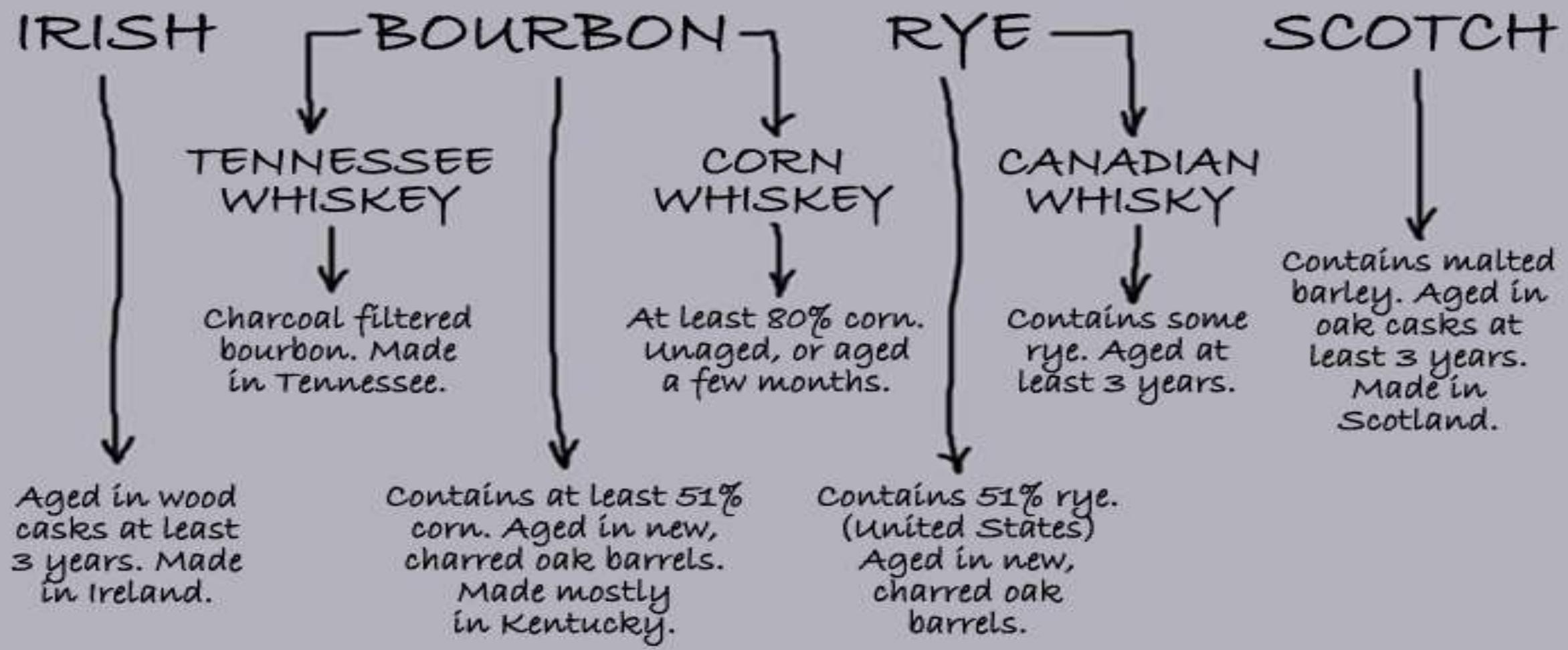
Crown – Jack – Jameson – Beam – Fireball

Canadian – Tennessee Bourbon-Irish-Kentucky Bourbon-Cinnamon



WHISK(E)Y

(FERMENTED GRAIN MASH)



Whiskey/Bourbon Fun Facts



Whisky has two legitimate spellings. “Whisky” is used in Scotland and Canada, and “Whiskey” is used by Irish and Americans.



Whiskey/Bourbon Fun Facts

Every year 2-4% of all whiskey stored in wooden barrels evaporates into air.



The term "[Angel's Share](#)" is a common term to describe the amount of spirit lost to evaporation during the aging process in a barrel.



Whiskey/Bourbon Fun Facts

*Think you are taxed heavily,
spare a thought for whiskey!
More than 50% of the purchase
price on a bottle of whiskey sold
in the United States goes to
federal, state and local taxes...*

Whiskey Rebellion: 1794

- SW PA - Outcry against tax on whiskey that would help pay national debt.
- Tarred & feathered/Harassed revenue officials so they couldn't collect the tax.
- No negotiation: Washington personally commanded army to put down revolt.
- 1st time U.S. govt, under the Constitution, used force against its citizens
- 1803: Tax repealed

Quick... Rank these from

Smoothest to Strongest (full-flavor)



Smoothest to Strongest (full-flavor)





Sake vs. Shochu

HISTORY

SAKE

- 1,000 years of production
- Most noted Breweries located in Central & Northern Prefectures

SHOCHU

- 500 years of production
- Most noted distilleries located in Southern Islands



What is Sake?

Sake is almost always described as rice wine, but it is BREWED.

It is not called sake in Japan, but rather NIHONSHU or SEISHU.

Sake has more alcohol than either wine or beer, usually around 30-35 proof, though still much less than hard liquor.

Important Sake Facts

- **Sake is NOT Rice Wine**
- **Sake is NOT Rice Beer**
- **Sake is Sake**



- **Sake is Gluten Free**
 - rice contains no glutens perfect for customers who are gluten intolerant
- **Sake is Sulfite Free**
 - some people are sulfite sensitive and get a slight headache from wine

Sake Myths

COMMON MYTH #1 – All Sake Should be served hot!

Most sake should be served chilled.

Heating most sake is the same as boiling your chardonnay before drinking it!



COMMON MYTH #2 – only Asian People drink Sake!

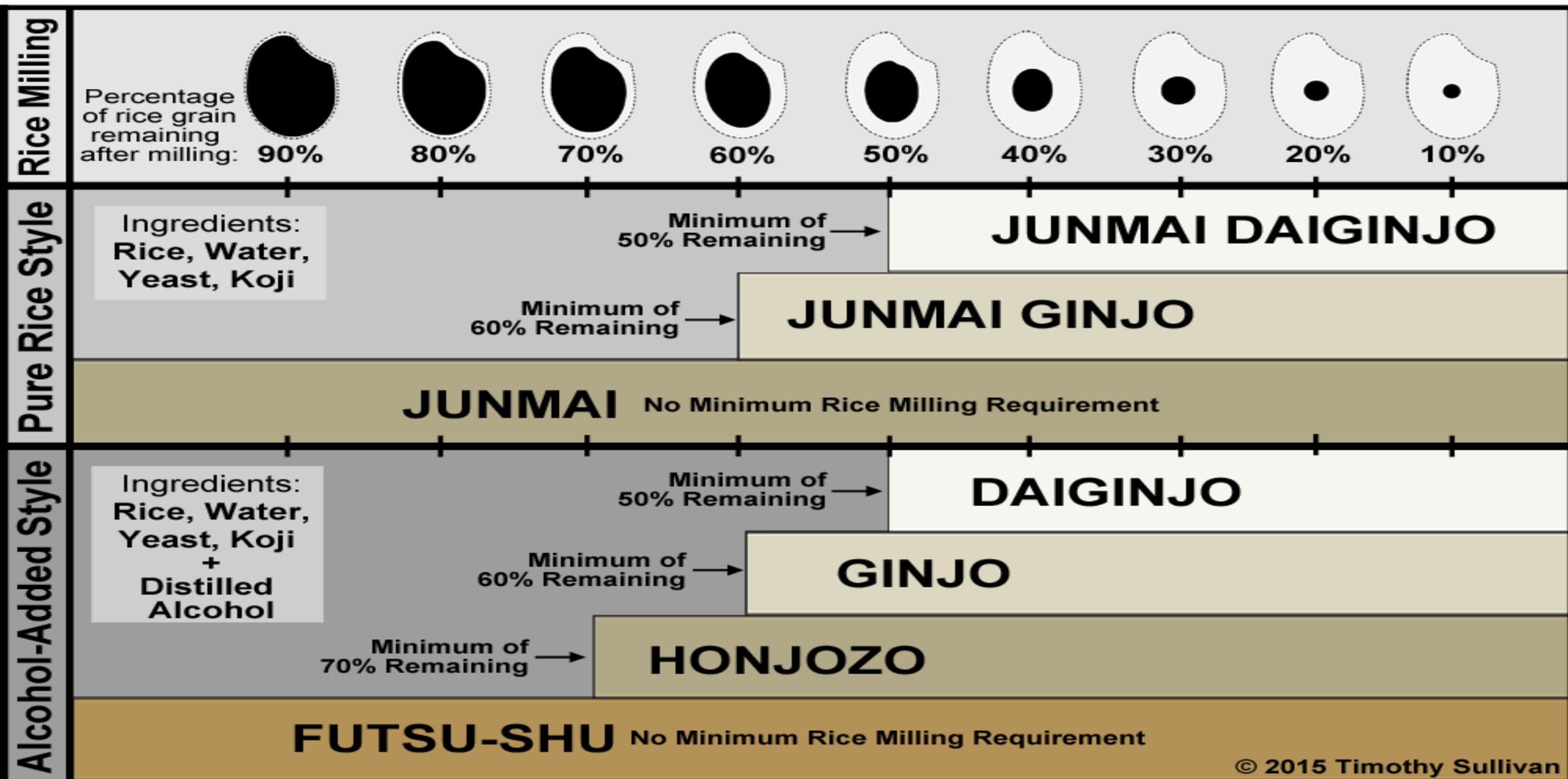
Sake customers are diverse... 20~40 yr old Americans are drinking and appreciating Sake. Sake growth is NOT from Japanese people (they drink Pinot Noir)



COMMON MYTH #3 – Sake only goes with Sushi!

Sake is ok with Sushi but goes better with all seafood as well as chicken, steak, vegetables and even cheese! Sake is half the acidity of wine and low to no sodium it makes for perfect food pairing.

Sake Classification System



What is Shochu?



Shōchū (焼酎?) is a [Japanese distilled beverage](#).

It is typically [distilled](#) from [barley](#) (*mugi*), [sweet potatoes](#) (*imo*), [buckwheat](#) (*soba*), or [rice](#) (*kome*).

Sometimes produced from other ingredients such as [brown sugar](#), [chestnut](#), [sesame seeds](#), or even [carrots](#).

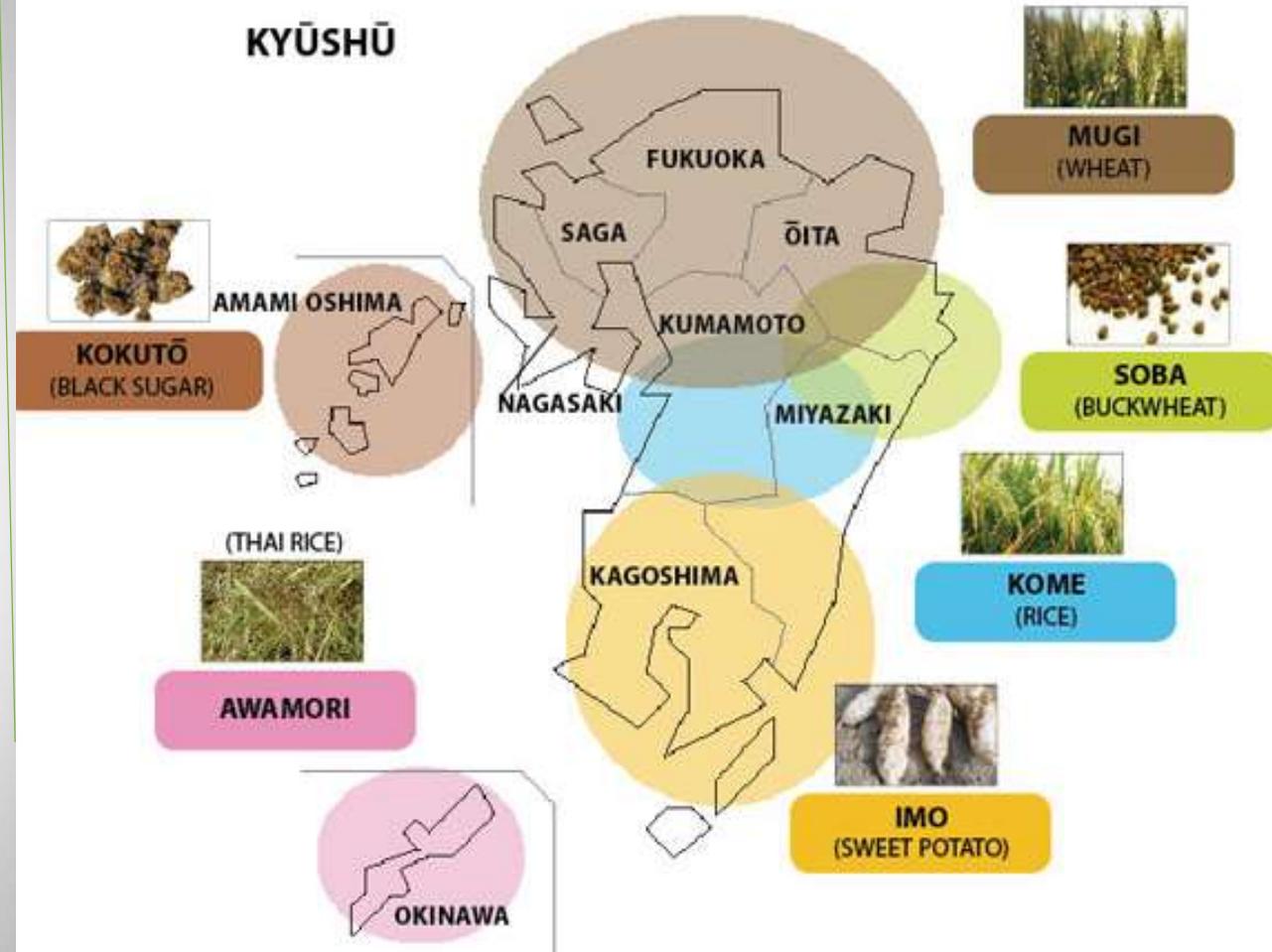
Shochu is more popular and has outsold sake in Japan for the past decade.

INGREDIENTS

SAKE



SHOCHU



SHOCHU'S GROWING POPULARITY

- 25-45yr old preference for premium & NEW & exotic
- Mixology's focus on craft spirits.
- New interest in international cocktails like Caipirinhas (Brazil's cachaca) and Pisco Sours (Peru's pisco)
- Skinny cocktail craze
- Trendy Japanese Culture, Food & Fashion



#1 SHOCHU IN HAWAII



Hawaiian Shochu Co.: In Haleiwa, Making Shochu out of Sweet Potatoes

To enjoy tonight.... Hakushika / Tozai Snow / Mizabasho / Chiyonsono/TyKu Cucumber.....



HAKUSHIKA
SAKE
JAPAN 1662



乾杯

Kanpai

Sooooo.... What did we learn...?

- **People drinking less, drinking better.**
- **More spirits, innovative mixed drinks.**
- **Craft Beer is rising!**
- **People want Local products.**
- **People exploring new...Sake/Soju.**

Next step ... on to the practice...





TEAMWORK!
WORKING TOGETHER GETS THE GOODS!

PICTUREQUOTES.COM

COLLABORATION:

Two or more people working together towards shared goals

Mahalo for allowing us here today!