

Paris, 24 September 2019

CMD – Meet the Management

Disclaimer

FORWARD-LOOKING STATEMENTS

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Some important risk factors that could cause the Group's actual results to differ materially from those expressed in its forward-looking statements include, but are not limited to: economic and political uncertainty (including interest rates and exchange rates), financial and regulatory developments, demand for the Group's products, increasing industry consolidation, competition from other breweries, the availability and pricing of raw materials and packaging materials, cost of energy, production and distribution related issues, information technology failures, breach or unexpected termination of contracts, price reductions resulting from market driven price reductions, market acceptance of new products, changes in consumer preferences, launches of rival products, stipulation of fair value in the opening balance sheet of acquired entities, litigation, environmental issues and other unforeseen factors. New risk factors can arise, and it may not be possible for management to predict all such risk factors, nor to assess the impact of all such risk factors on the Group's business or the extent to which any individual risk factor, or combination of factors, may cause results to differ materially from those contained in any forward-looking statement. Accordingly, forward-looking statements should not be relied on as a prediction of actual results.

Cees 't Hart
Chief Executive Officer

OUR GROWTH
JOURNEY IS WELL
ON TRACK

SAIL'22

Today's agenda

CEES 't HART

Our growth journey is well on track, with progress on...

NANCY CRUICKSHANK & JOHN LITTLETON

... Digital business transformation

KAARE JESSEN

... Taking DraughtMaster to the next level

PHIL HODGES

... Ensuring a world-class supply chain

JOÃO ABECASIS

... Premiumising in France

HEINE DALSGAARD

... to deliver shareholder value...

... with regional Golden Triangle focus on...

JACEK PASTUSZKA

... Growing margins in Western Europe

GRAHAM FEWKES

... Growing top-line in Asia

LARS LEHMANN

... Rebalancing volumes in Eastern Europe

Our SAIL'22 strategy continues to define our business agenda...



STRENGTHEN THE CORE

- Leverage our strongholds
- Excel in execution
- Funding the Journey culture



POSITION FOR GROWTH

- Win in craft & speciality
- Win in alcohol-free brews
- Grow in Asia



DELIVER VALUE FOR SHAREHOLDERS

- Organic growth in operating profit
- ROIC improvement
- Optimal capital allocation



CREATE A WINNING CULTURE

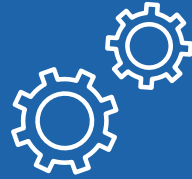
- Team-based performance
- Together Towards ZERO
- Compass

... while our journey has evolved



**FUNDING
THE JOURNEY**

2016-2017



**SHIFTING GEARS
TO GROWTH**

2018



**ACCELERATE
TOGETHER**

2019



By delivering strong results from Funding the Journey, we have been able to invest in our business...

- Funding the Journey delivering total net benefits of around DKK 3bn
- More than DKK 1bn reinvested in support of SAIL'22
- We continue our focus on efficiencies and costs by maintaining a Funding the Journey culture



2016-2018



Funding the Journey

2019 ->



Funding the Journey *culture*

... strengthened our core beer business...

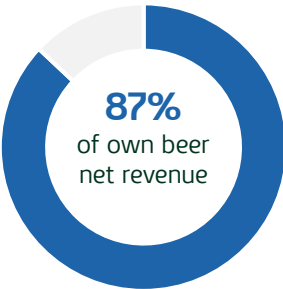
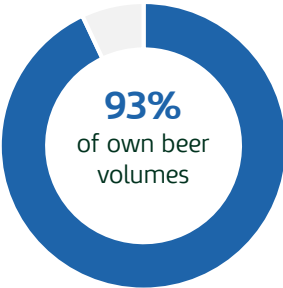
10%
volume
growth
in 2018

5%
volume
growth
in 2018

CORE BEER

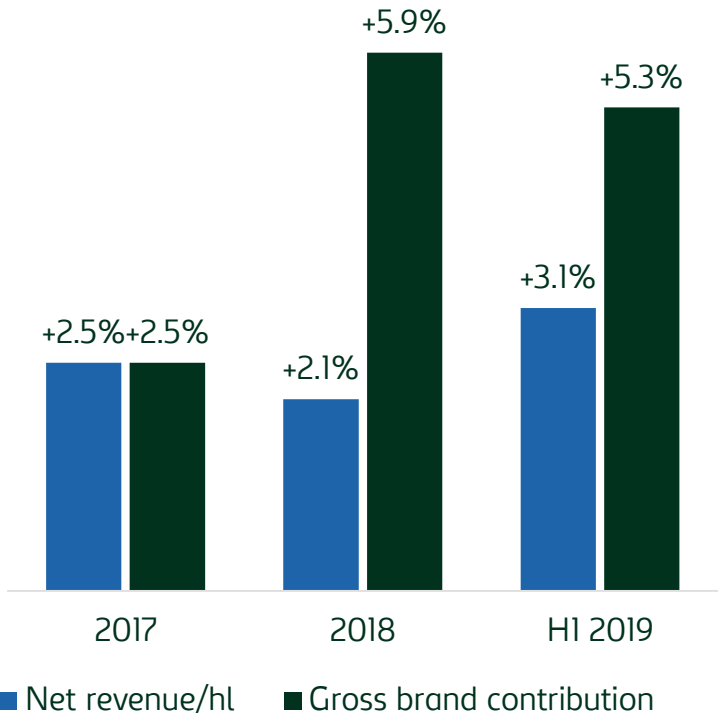


INTERNATIONAL BRANDS



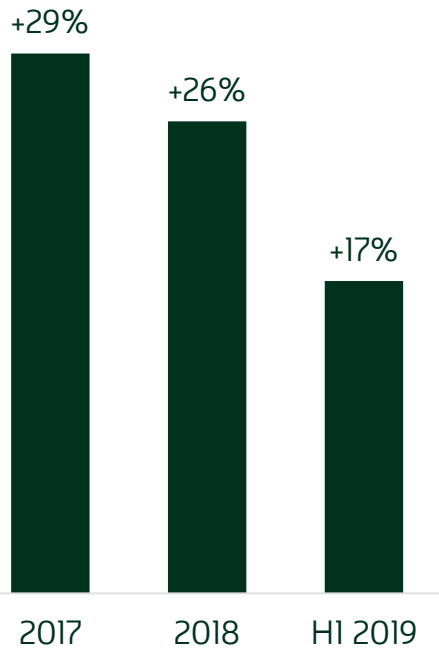
LOCAL POWER BRANDS

Core beer delivering solid top- and bottom-line numbers

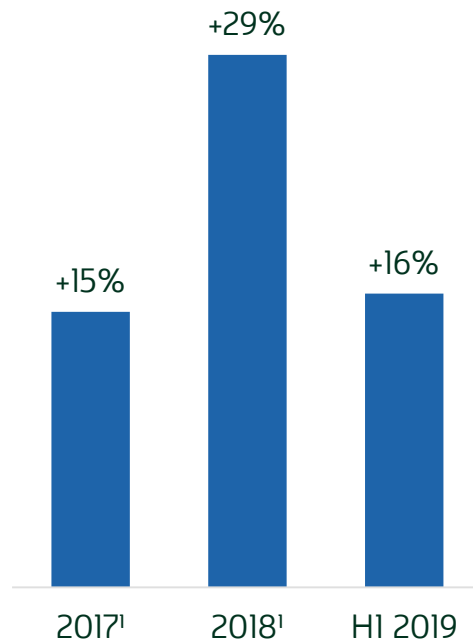


... and made our portfolio more attractive with craft & speciality brands and alcohol-free brews

Craft & speciality



Alcohol-free brews



GROWING CATEGORIES



CRAFT & SPECIALITY

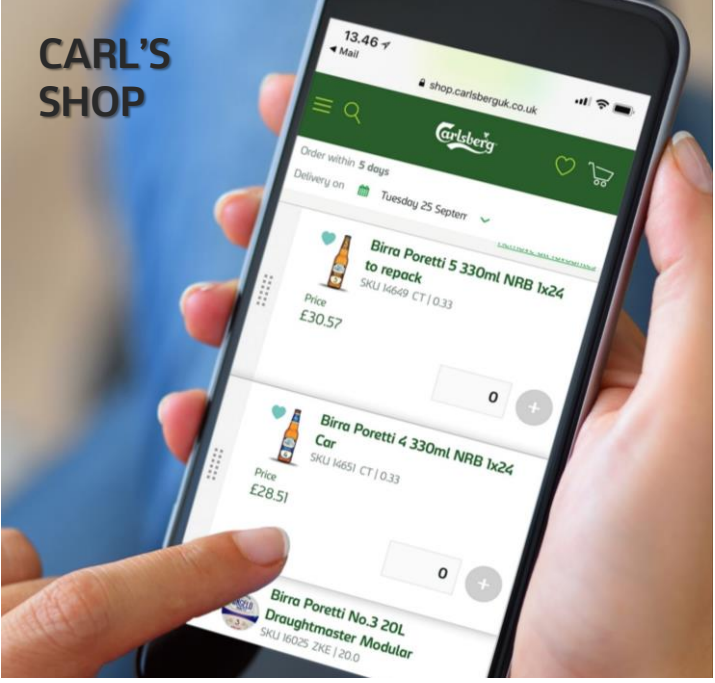
ALCOHOL-FREE BREWS

Combined with improved capabilities...

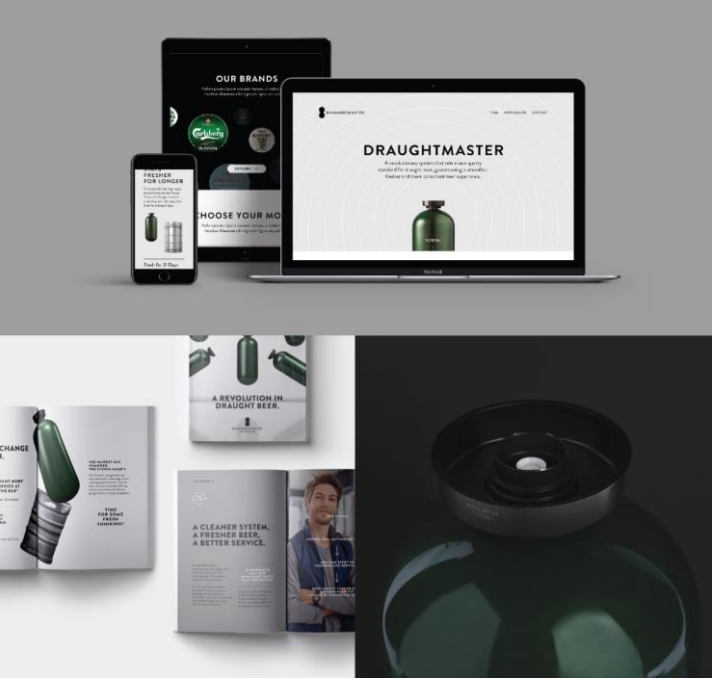
CONSUMER SEGMENTATION

Refresh and Replenish	Knowing the Best	Part of the Group
Reward and Indulge	Fuelling Fun	Unwind and Unplug
Shared Treat and Celebration	Signalling Status	Carefree Time

DIGITAL



INNOVATION



DEMAND SPACES



... and strengthened performance management...

- Our team-based One Carlsberg culture is integrated into our remuneration policy
- Short-term and long-term incentive schemes aligned with shareholder value creation

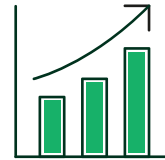
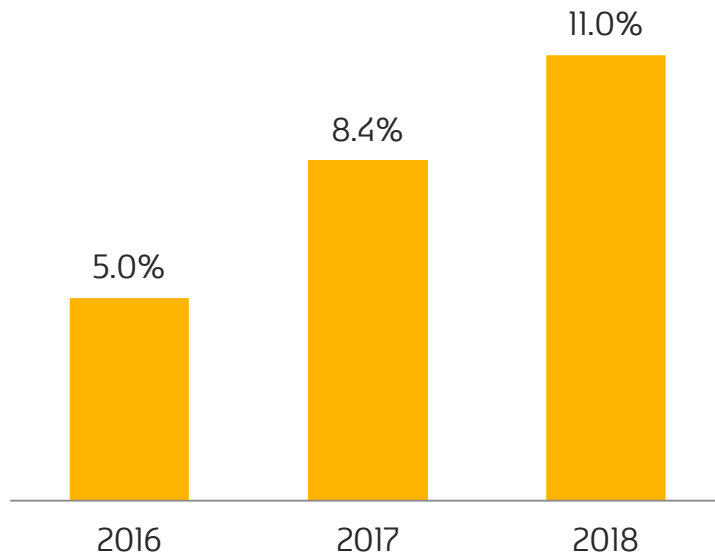
STI	2018-2019 Fund and Grow*	Regular LTI
Organic net revenue growth	Organic net revenue growth	Relative total shareholder return
Organic operating profit growth	Organic operating profit growth	Organic operating profit growth
Cash flow		Growth in adjusted EPS
Individual KPIs		ROIC

* Top-200 excl CEO and CFO

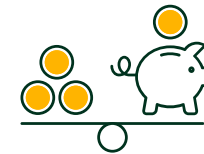
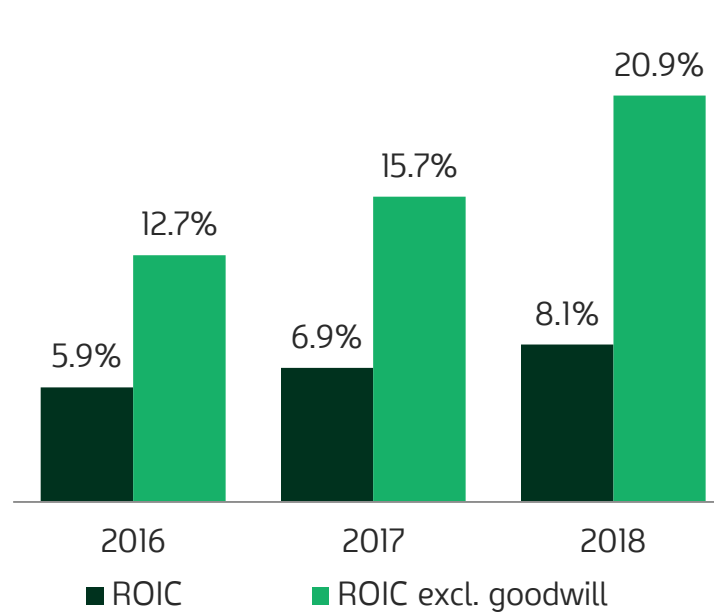
... we have delivered consistently against our financial SAIL'22 ambitions and targets



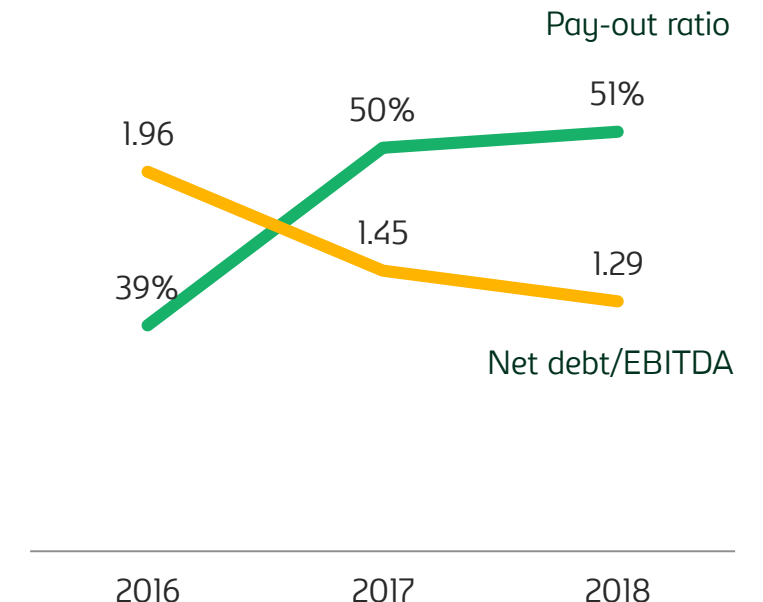
Organic growth in operating profit (%)



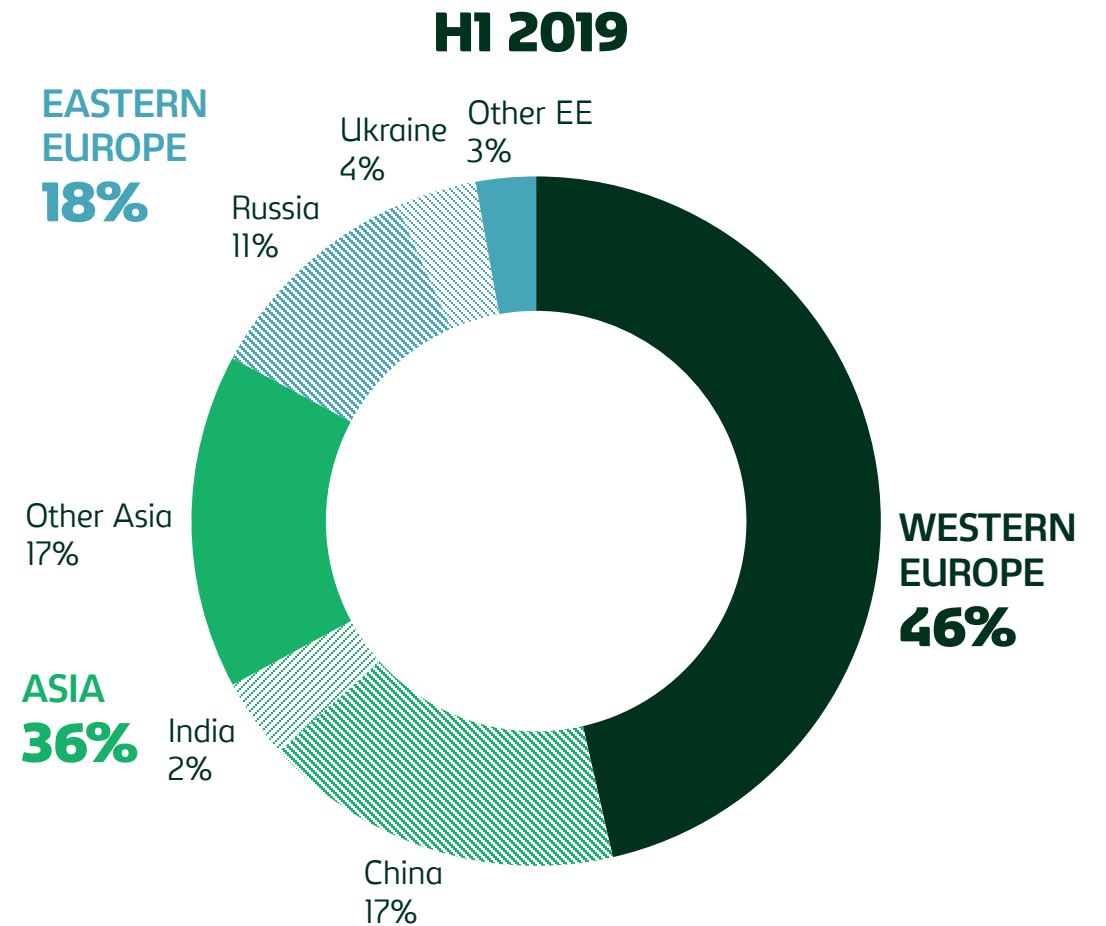
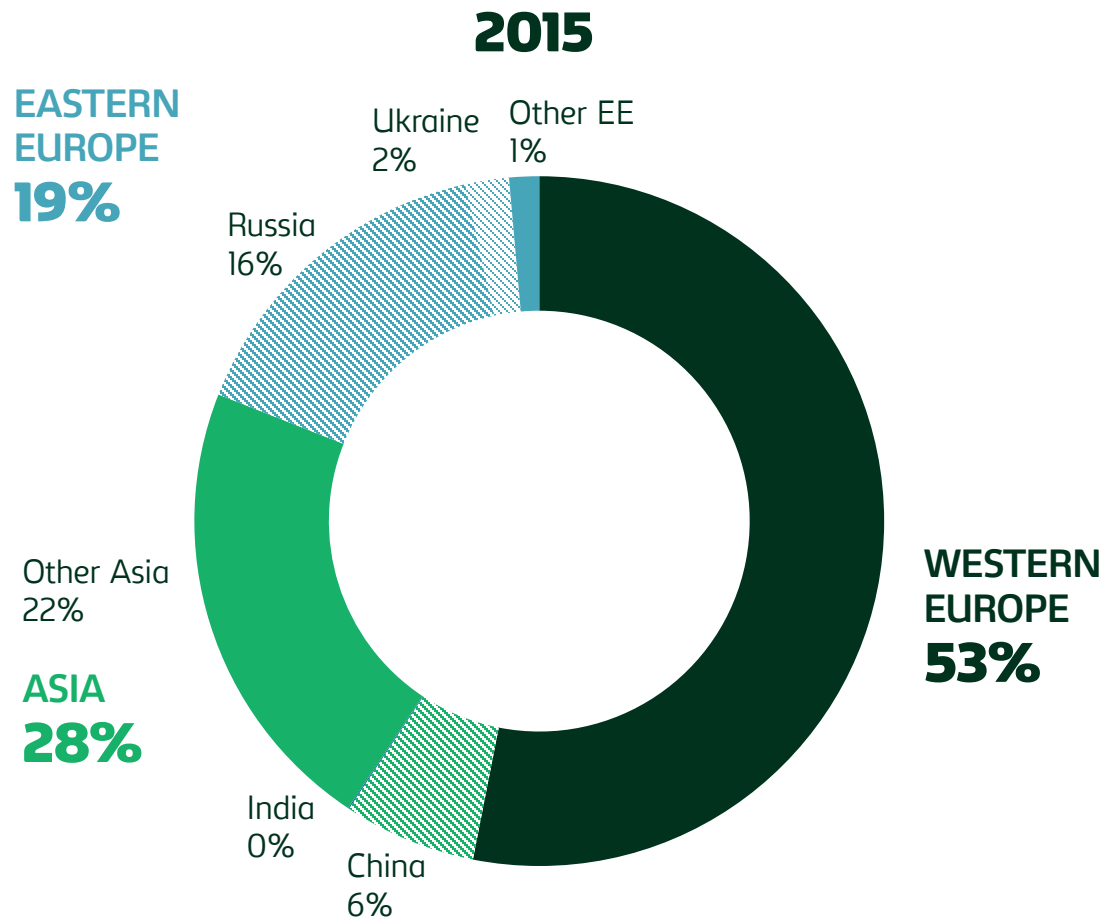
ROIC improvement



Optimal capital allocation



We have rebalanced our portfolio and participate in large profit pools...

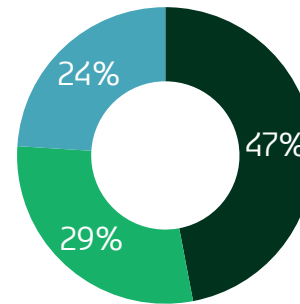


Graphs show operating profit split

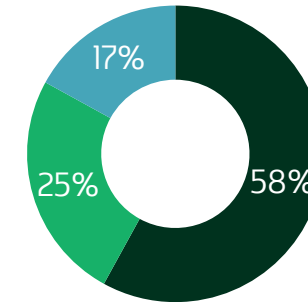
... and have a balanced geographic exposure with 25 #1/2 positions

2018

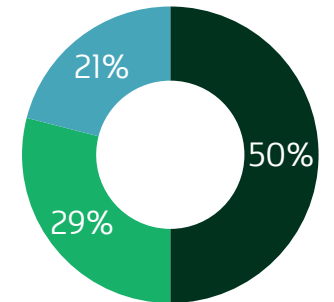
Volume split



Net revenue split



Operating profit split



WESTERN EUROPE

No. 1 and 2 positions (13)

- Denmark
- Sweden
- Norway
- Finland
- Switzerland
- France
- Estonia
- Lithuania
- Latvia

- Bulgaria
- Greece
- Portugal

Other markets

- UK
- Poland
- Germany
- Serbia
- Croatia

ASIA

No. 1 and 2 positions (7)

- Western China
- Laos
- Nepal
- Hong Kong
- Malaysia
- Singapore
- Sri Lanka

Other markets

- Eastern China/Big Cities
- India
- Myanmar
- Cambodia
- Vietnam

EASTERN EUROPE

No. 1 and 2 positions (5)

- Russia
- Ukraine
- Belarus
- Kazakhstan
- Azerbaijan

■ Western Europe ■ Asia ■ Eastern Europe

Recent employee survey shows improved organisational health...

EMPLOYEE ENGAGEMENT



84%

v. 2016 **+6**

v. FMCG norm **+12**

SATISFACTION



89%

v. 2016 **+5**

v. FMCG norm **+10**

RECOMMEND



83%

v. 2016 **+7**

v. FMCG norm **+12**

LOYALTY



74%

v. 2016 **+7**

v. FMCG norm **+16**

PRIDE



88%

v. 2016 **+3**

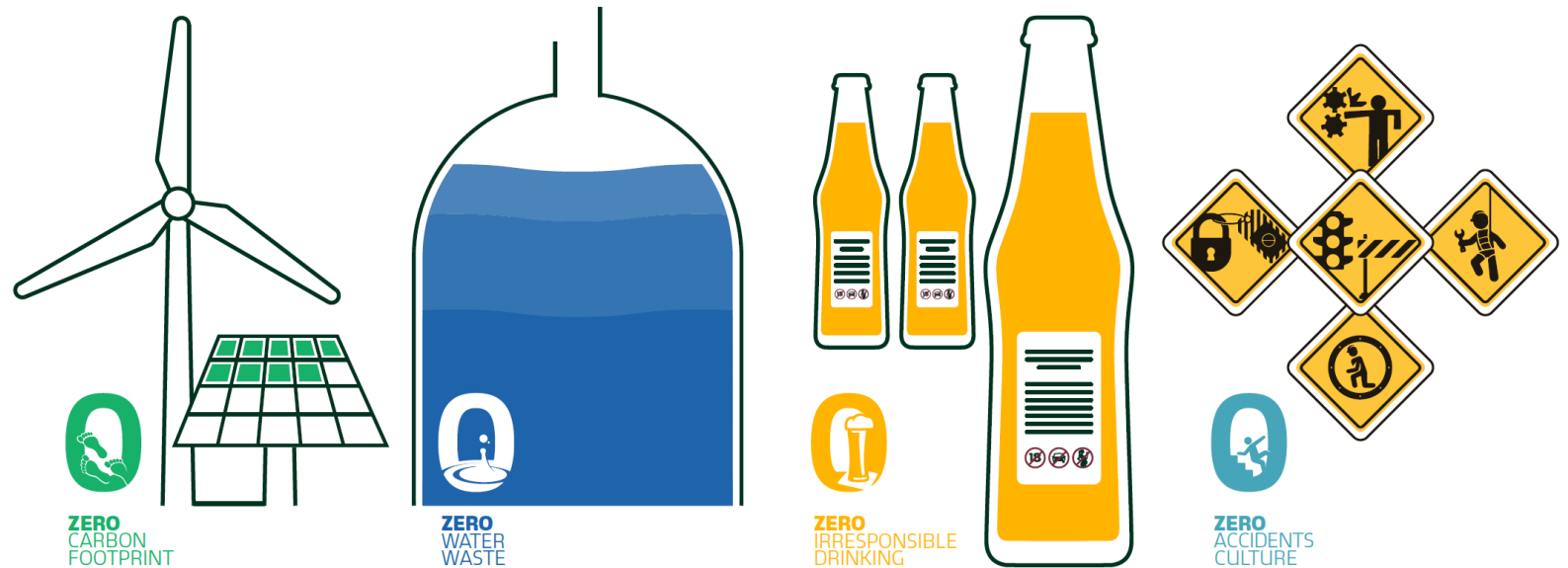
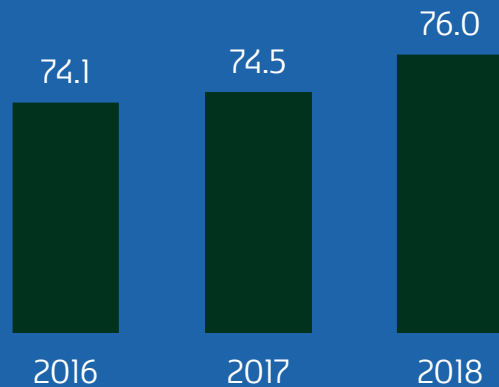
v. FMCG norm **+9**

... and good reputation scores, led by improvement towards our Together Towards ZERO targets

Reputation

- Reputation score* ahead of competitors in 7 out of 12 markets
- Group's overall reputation score improving in 8 out of 12 markets as well as globally

Global reputation score



20%

reduction in relative carbon emissions, since 2015

9%

improvement in water efficiency, since 2015 baseline

96%

of our products now carry responsible drinking messages

35%

reduction in lost-time accident rate since 2015.

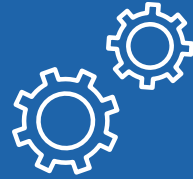
* Reputation Institute, Reprack 2016-2018 analysis based on interviews with 12,694 people across 12 markets

Our journey continues...



**FUNDING
THE JOURNEY**

2016-2017



**SHIFTING GEARS
TO GROWTH**

2018



**ACCELERATE
TOGETHER**

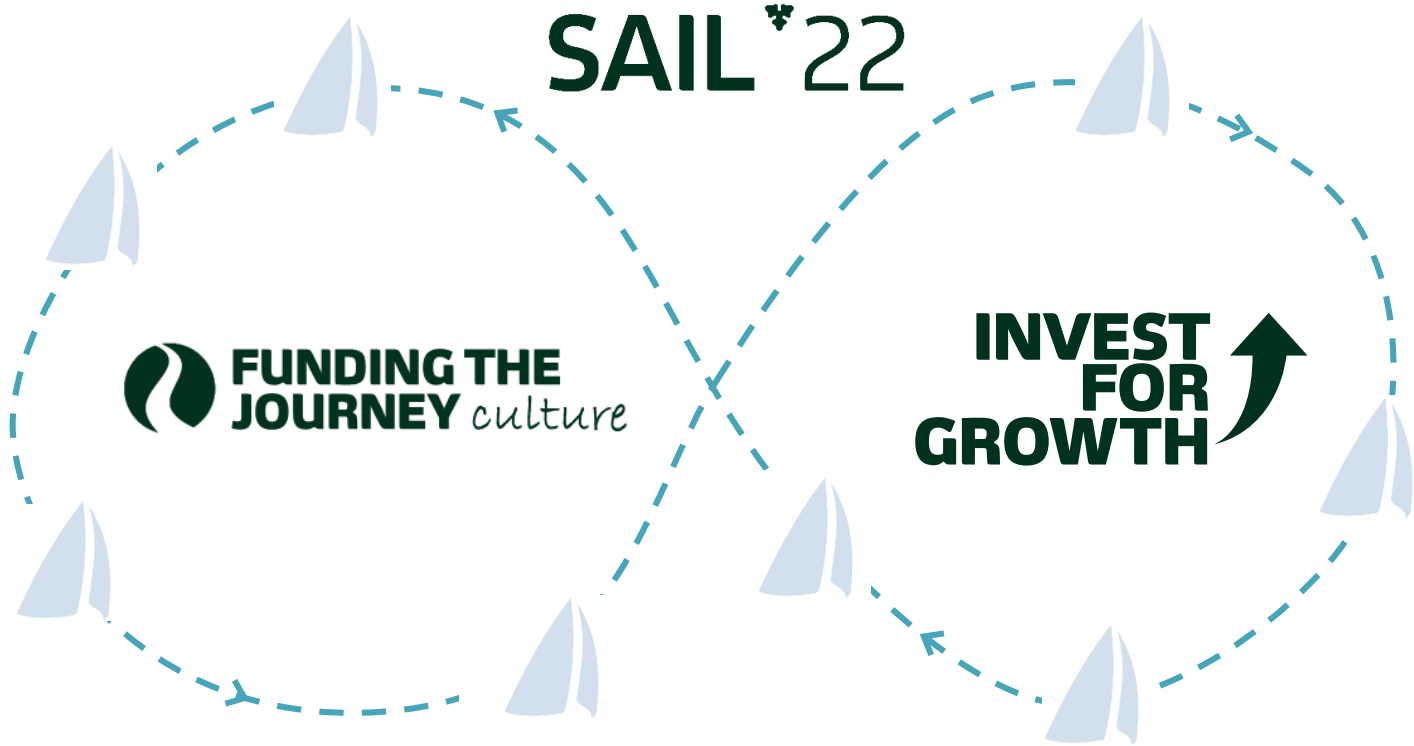
2019



**AT FULL
SAIL**

2020->

... at full SAIL...

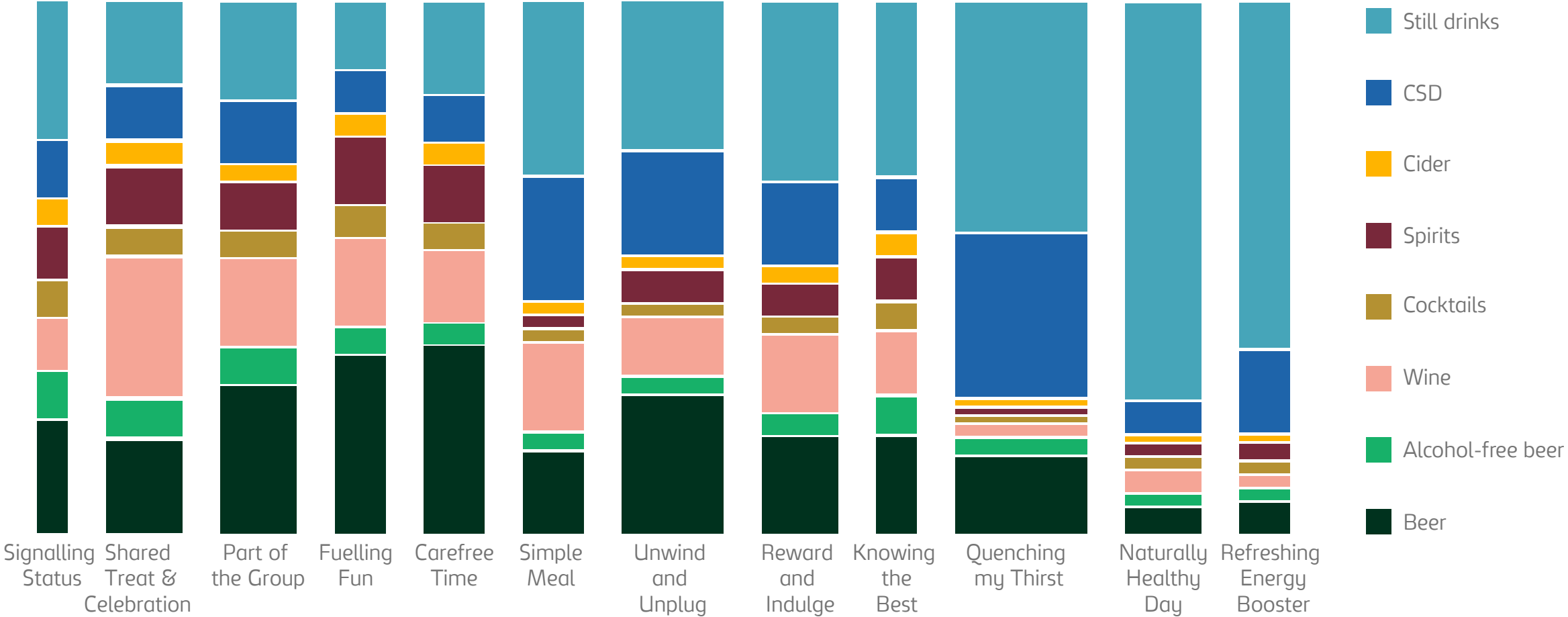


... with ample opportunities for growth

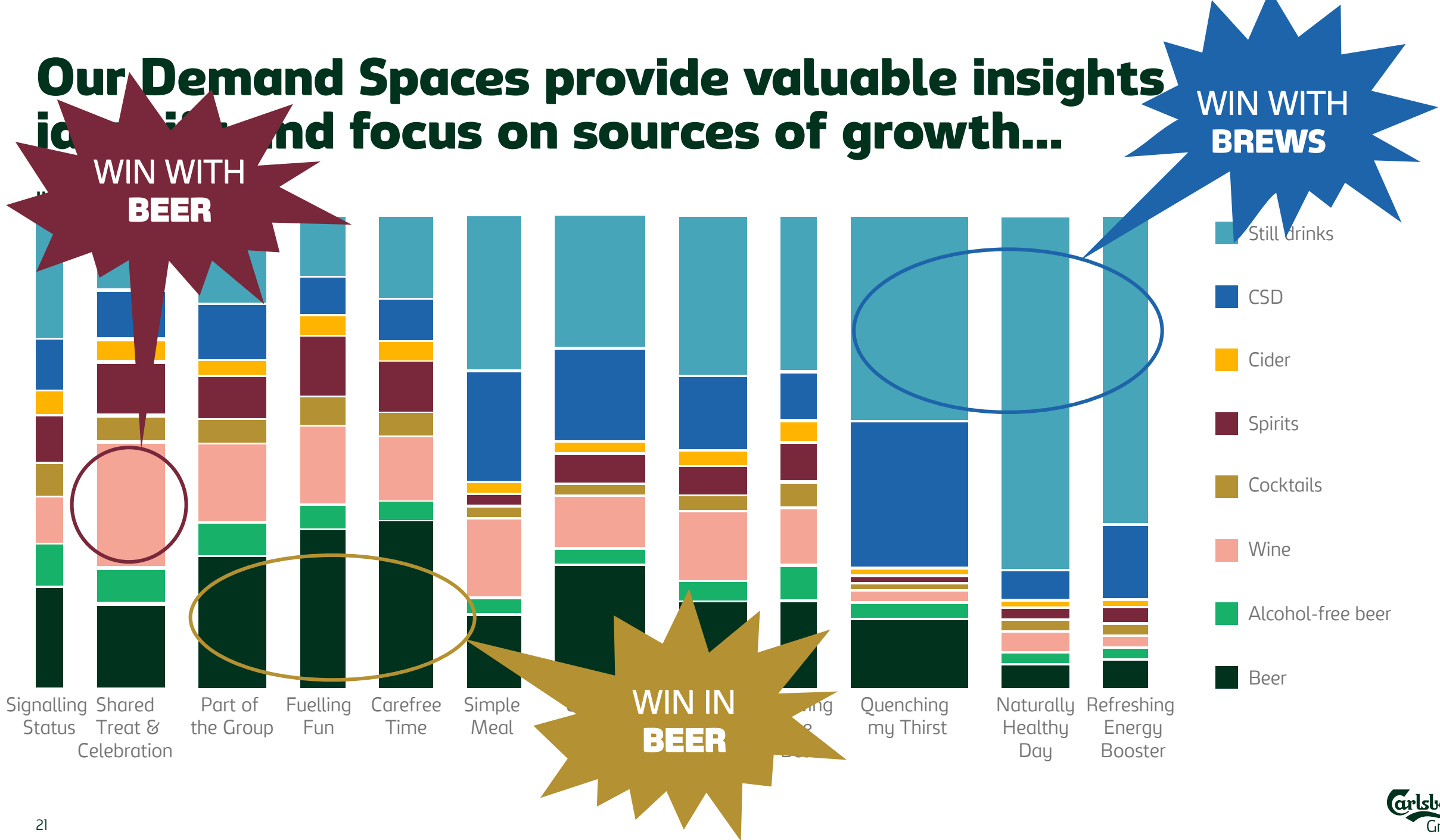


Our Demand Spaces provide valuable insights to identify and focus on sources of growth...

ILLUSTRATIVE



Our Demand Spaces provide valuable insights into consumer behavior and focus on sources of growth...



WIN IN BEER by investing behind and strengthening our local power brands

LOCAL POWER BRANDS

- Remain the bulk of core beer business and key in all regions
- Driving growth using Demand Spaces
- Three-year growth plans based on brand guardrails to guide execution



WIN IN BEER by strengthening the credentials of our local power brands

FLAGSHIP BARS

- Local power brands with exceptional stories and heritage
 - but needed to bring this to life for today's consumers
- Establishment of on-trade “brand homes”
- Launch of new premium variants
- Re-establishing the strength of brand stories and brewing credentials



WIN WITH BEER by driving 1664 Blanc in Shared Treat and Celebration moments

1664 BLANC

- Highly attractive Demand Space, with substantial wine penetration
- Leverage French heritage to elevate image
- Winning brew with strong appeal beyond traditional beer drinkers

40+

Now present in 40+ markets and still high potential to expand

29%

+29% global growth in 1H 2019

40%

+40% growth in China, with 88% growth in e-commerce



WIN WITH BREWS by addressing five macro trends impacting category and flavour trends

Fresh, Natural, Pure



Indulgence & Variety



Moderation & Control



Wellness



Sustainability



WIN WITH BREWS by expanding Somersby into new occasions

SOMERSBY SPARKLING SELECTION

- Addressing consumer trend of indulgence and variety
- Somersby Sparkling Selection innovations targeting wine and spritz occasions directly
- Enabling up-trading and incremental volume



WIN WITH BREWS by expanding into unique, naturally healthy brews beyond beer

BARLEY BROS and expanding TOURTEL TWIST

- Leveraging increasing trend for fresh, natural and pure products
- Using unique technology to produce a barley based “soft brew” with 0.0% alcohol
- 100% natural, clean label
- Launched in Russia, Baltics and France in summer 2019
- Tourtel Twist up 33% in 2018



Each region has its own role to play...

WESTERN EUROPE

- Grow value through premiumisation and pricing
- Improve margins through top-line growth and driving efficiencies and costs



EASTERN EUROPE

- Rebalance the Golden Triangle

ASIA

- Drive volume growth
- Expand and grow international brand portfolio
- Continue premiumisation of local brands

... with digital business transformation playing an increasingly important role in improving customer satisfaction and driving efficiency

Our 2019/2020 digital business transformation priorities

Advanced analytics for smarter decisions

Enabling our customers, to grow together



Our ambition remains to deliver consistent top- and bottom-line growth and shareholder value...

NET REVENUE

- Grow net revenue organically every year

OPERATING PROFIT

- Deliver organic operating profit growth ahead of top-line growth

OPERATING MARGIN

- By that strengthen operating margin, closing the gap to our nearest competitor

RETURN TO SHAREHOLDERS

- Maintain a financial leverage enabling growth in shareholder returns (dividends and share buy-back)



... and since 2017, we have achieved this ambition

NET REVENUE

- Grow net revenue organically every year

OPERATING PROFIT

- Deliver organic operating profit growth ahead of top-line growth

OPERATING MARGIN

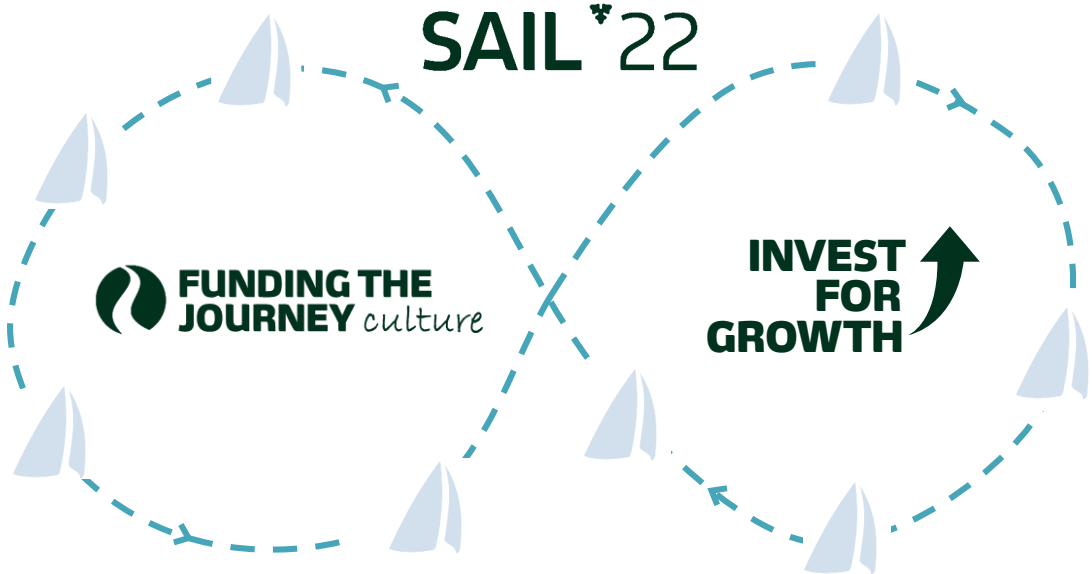
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CREATE A WINNING CULTURE

- Team-based performance
- Together Towards ZERO
- Compass

... and today we will elaborate further

CEES 't HART

Our growth journey is well on track, with progress on...

NANCY CRUICKSHANK & JOHN LITTLETON

... Digital business transformation

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... Taking DraughtMaster to the next level

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... to deliver shareholder value...

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... Growing top-line in Asia

LARS LEHMANN

... Rebalancing volumes in Eastern Europe

Nancy Cruickshank
Sr. Vice President Digital Business Transformation
John Littleton
Vice President Sales Execution

ARTICULATING OUR DIGITAL TRANSFORMATION PROGRAMME

DIGITAL BUSINESS TRANSFORMATION

Agenda

WHY Digital Business Transformation

Equipping Carlsberg to thrive and grow in a world of continuous change

WHAT we want to achieve

Harnessing digital to drive margin progression and net revenue growth

Innovating customer experience to grow together

HOW we will we do it

Pilot → startup → scale up

Making clear choices

Embedding change, embracing new ways of working

Every minute is rapidly becoming an internet minute

2019: the internet is bigger than TV worldwide

'The New Normal': rapid, continuous change

Innovation: a necessity, no longer a competitive advantage

2019 This is what happens in a Western internet minute



The digital challenge facing all companies



DO NOTHING

'A small beer company'
Survival is not mandatory, but doing nothing is the fastest way to become obsolete



RE-ARTICULATE VISION

'A tech company that sells beer'
We could have chosen to re-imagine our business as a tech company



RECOGNISE CORE STRENGTH

'A brewer enabled by tech'
Building from our SAIL22 priorities:

- ▶ Excel at point of purchase
- ▶ Manage complexity
- ▶ Step-change with digital
- ▶ Master value management

Carlsberg's step change with digital



SAIL22 ENABLED BY DIGITAL



IMPROVE EFFICIENCY
BY DIGITALISING THE CORE



ACCELERATE
NEW DIGITAL
GROWTH



DRIVE EFFECTIVENESS
VIA CRITICAL
TECH & DATA
ENABLERS

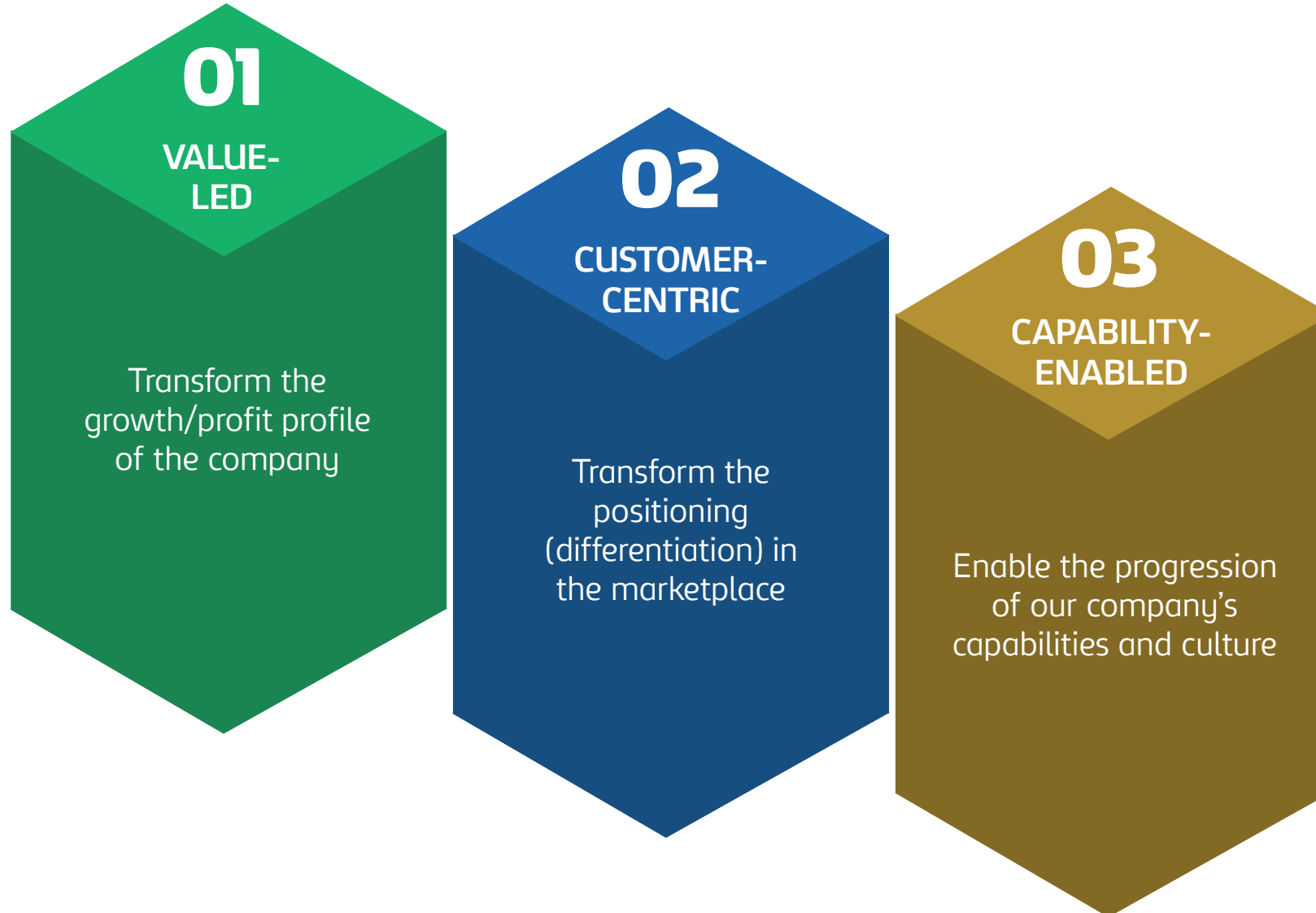


HARNESS NEW
WAYS OF
WORKING

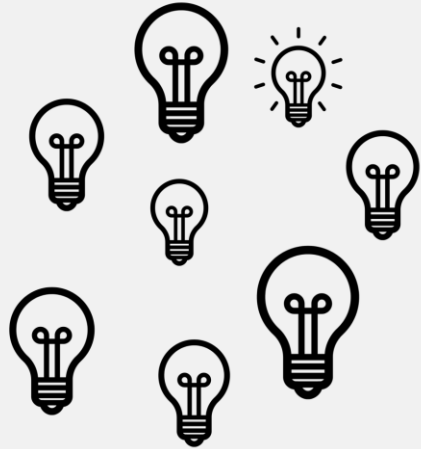


INTEGRATED
ECOSYSTEMS &
PARTNERSHIPS

We work with digital in three dimensions



The evolution of our digital business transformation programme



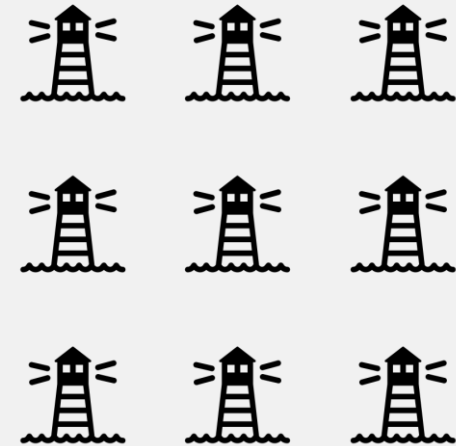
Scattered Experimentation

Dispersed, locally-driven initiatives and prototypes



Lighthouses

Co-creating and piloting with end-users across multiple markets



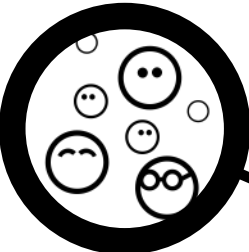
Programme

Building a scalable system of digital products and services

Our Lighthouses introduce new ways of working

PROTOTYPE 'NEXT' CARLSBERG

Empowered digital product teams co-creating with customers



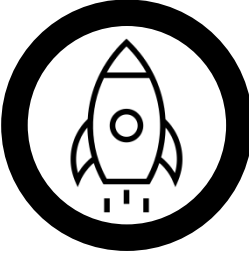
VALIDATE VALUE EARLY

Prioritising projects that deliver early value to build confidence



BUILD MOMENTUM

Projects geared to work at blistering pace to retain focus and build momentum



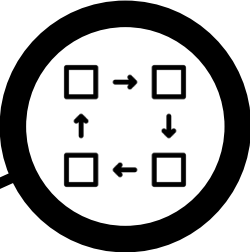
MAKE CHANGE REAL

Looking over horizon to address significant problem/opportunity spaces



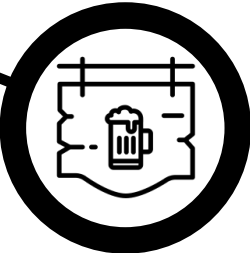
BUILD INNOVATION MUSCLE

End-to-end innovation through feasibility, market fit, desirability, design, build, scale, operations



CUSTOMER EXPERIENCE-LED

Experience-first approach, driven by human insights & design thinking principles



Inside our lighthouses, we have digital product teams



Core (5-10 people)



Co-creating with markets & customers



Cross functional



Co-located as much as possible



Design thinking



Minimum viable bureaucracy



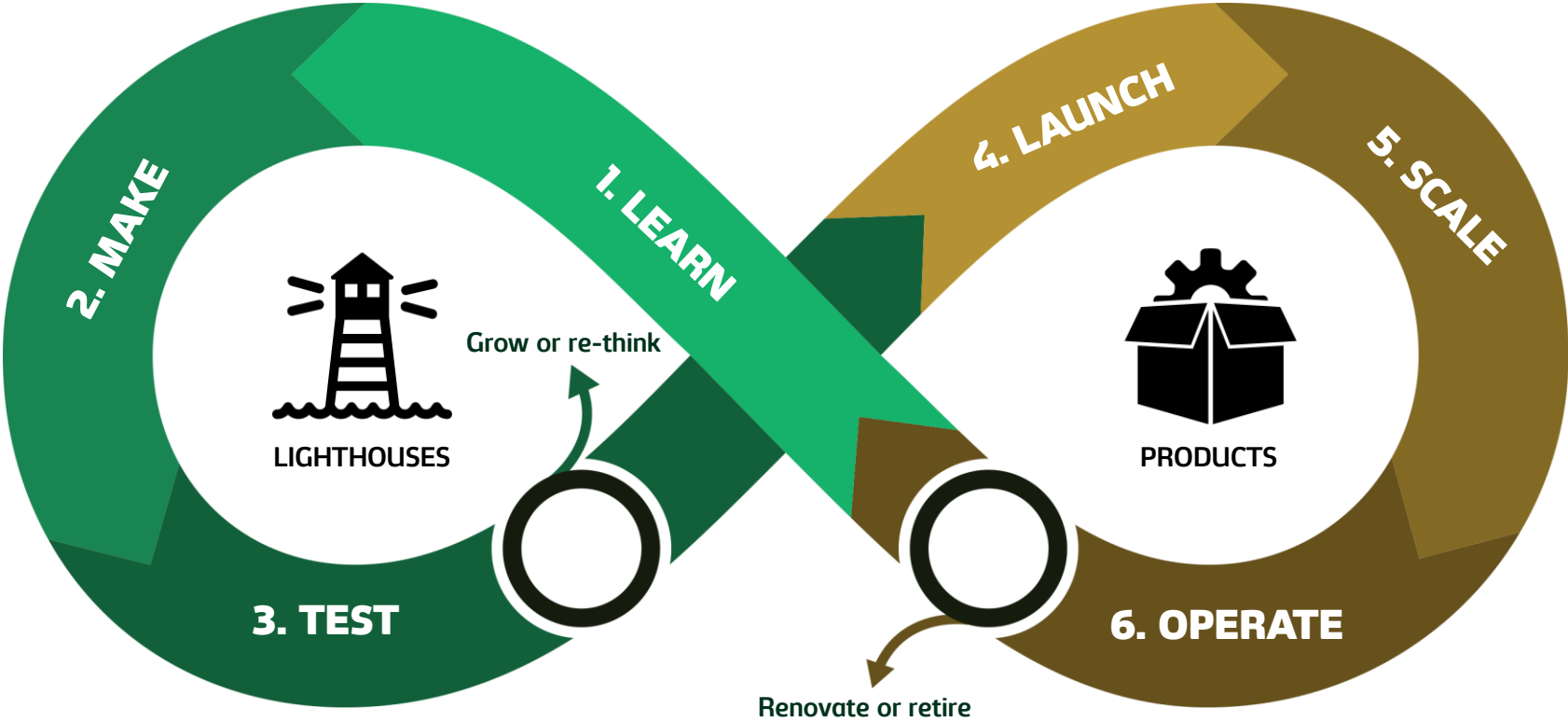
Customer obsessed



Aligned to business goals



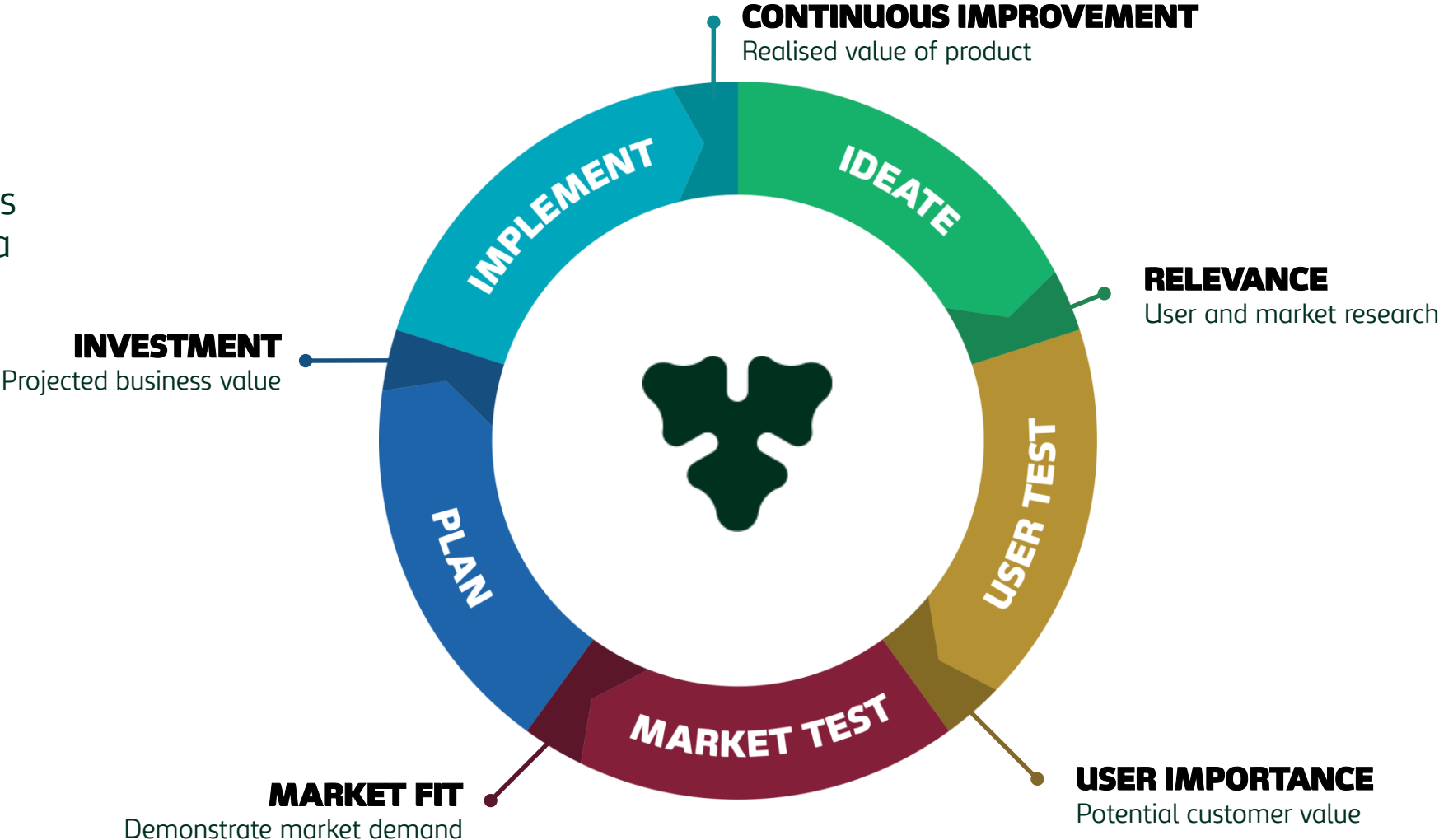
Our digital product lifecycle










Evidence driving investment decisions

A rational, evidence-based approach

Understanding that the signals are giving us confidence that a product has potential



Connecting in today's ecosystem and forging new partnerships is key to digital success

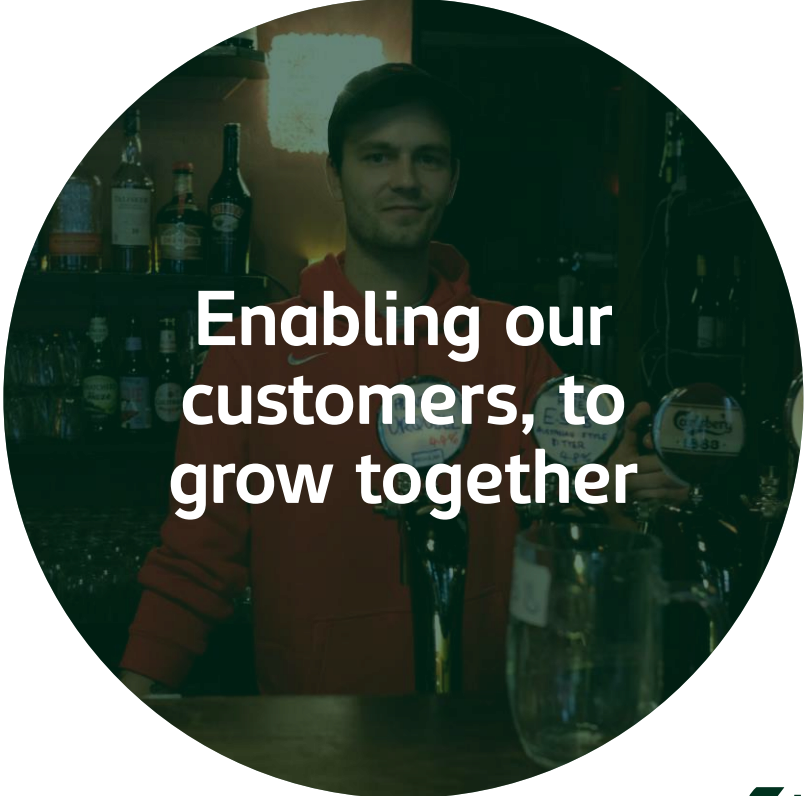
Vertically integrated tech titans	Pureplay digital retailers	New marketing partnerships	Information partnerships	New routes to market	Contemporizing relationships with traditional partners
 <p>Alibaba Group 阿里巴巴集团</p> <p>Tencent 腾讯</p> <p>Baidu 百度</p> <p>Creating differentiation and strategic value in these ecosystems to thrive</p>	 <p>ocado</p> <p>deliveroo</p> <p>Accessing new drinking moments that were previously out of reach</p>	 <p>facebook</p> <p>Google</p>  <p>Connecting with our consumers in the most relevant environments</p>	 <p>Partnering with other companies to create value collaboratively</p>	 <p>Creating new routes to market and retail spaces to 'win'</p>	 <p>Collaborating with partners on advanced analytics and data products</p>

Introducing our top priorities for 2019/20

We are enhancing productivity and accuracy via Advanced Analytics to yield further visibility, flexibility and efficiency, and enabling our customers so that we can grow together



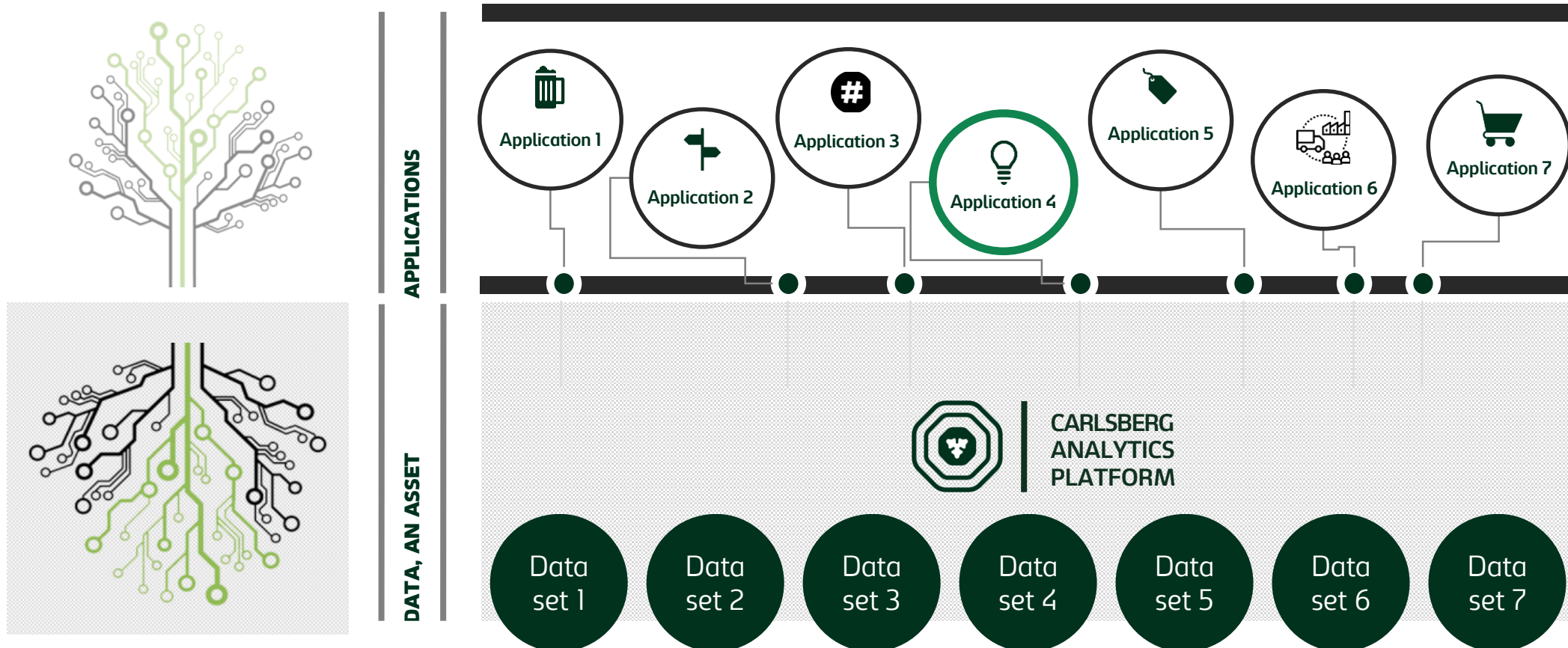
**Advanced
analytics for
smarter decisions**



**Enabling our
customers, to
grow together**

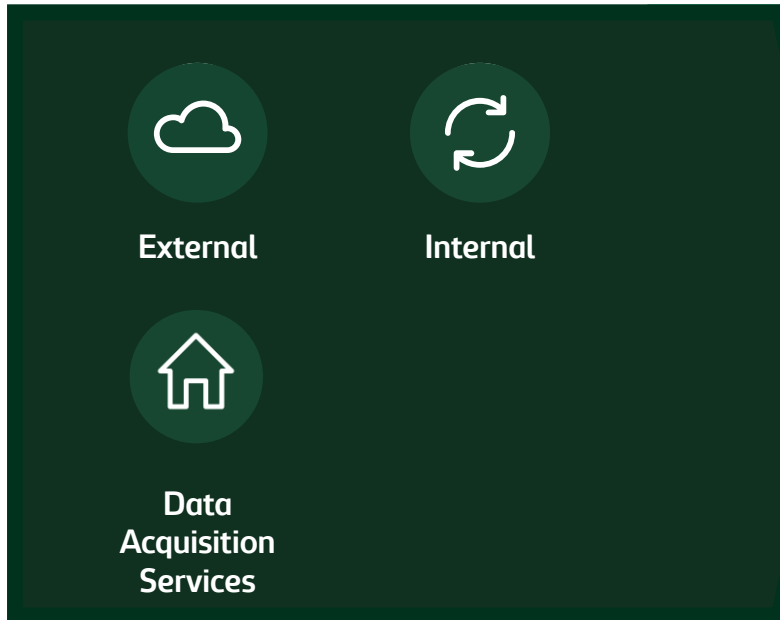
We've created the Carlsberg Analytics Platform (CAP) to allow us to solve business problems with data

We're dynamically mapping different data sets within the platform instead of a large-scale ERP harmonisation programme



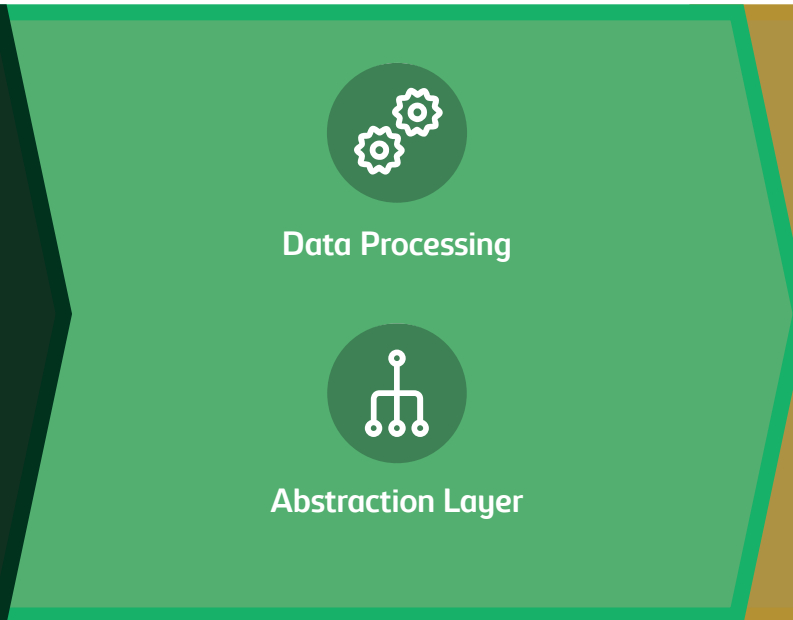
Carlsberg Analytics Platform (CAP): how it works

ACQUIRING DATA



- Sourcing many different types of data into the platform
- Structuring, cleaning and mapping data

CONNECTING DATA



- Processing and aggregating different data-sets
- Modelling the data in a way that makes it simple for the user
- Automatically refreshing and updating the data-sets

CONSUMING DATA



- Simple and intuitive visual interfaces
- Seamless integration into end-user applications
- Automated, data-driven business insights

Digitalising Consumer Demand is one of our lighthouses

We are achieving a step-change in demand planning through a highly collaborative sales and supply chain planning model

4-18%pts
improved
forecasting
accuracy
(FR pilot)

50%
extreme
errors reduction
(FR pilot)

25-50%
non-value
adding time
reduction

€M's
in direct
benefits
globally

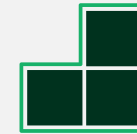
We use Machine Learning (ML) to leverage richer data input and improve demand forecast accuracy

Machine Learning prototype in six steps

1.
Data extraction
and cleaning



2.
Build predictive
features



3.
Train model on
historic data



4.
Test model
on historic & future data



5.
Automate data feed and
develop user interface



6.
Prepare for scale up
(RU/CH)



ML model outperforms traditional model at all levels

RESULTS

Forecast (SKU-Wk)	MONTH-3	WEEK-4	WEEK-1
Model	Trad. → ML	Trad. → ML	Trad. → ML
Aggregated	+6 ppt	+4 ppt	+10 ppt
Warehouse	+9 ppt	+9 ppt	+15 ppt
CPG level	+6 ppt	+6 ppt	+18 ppt

POTENTIAL FUTURE OUTCOMES

INCREASED TRANSPARENCY	HIGHER SERVICE LEVEL
REDUCED WAREHOUSE COSTS	REDUCED COST OF RAW MATERIALS
LESS OBSOLETES	LESS PENALTIES
LOWER COST INTERNAL TRANSPORT	

4-18 ppt improved forecasting accuracy (FR pilot)

Example is based on Carlsberg 2018 historical data

We're using ML in other areas to drive loyalty, profitability and premiumisation



Machine Learning to drive loyalty

Advanced Analytics is a key enabler in Western Europe.

It equips our teams with insights to support profitable business growth and customer retention



Machine Learning to drive profitability and premiumisation

Advanced Analytics helps us to understand critical customer retention factors, key trends and triggers.

We can also calculate the most important customer profitability drivers

Carlsberg digital business transformation programme

01

Equipping the business to thrive and grow in a world of continuous change

02

A scalable programme of digital product and service innovation; strategically-driven focus with strong ROI

03

Our top priorities for 2019/20:
1. Advanced Analytics for smarter decisions
2. Enabling our on-trade customers, to grow together

04

Solutions co-created with design thinking approach, working with thousands of customers and our market teams across multiple geographies

05

Key principles of our programme: KPI-driven, rapid; evidence-based; agile and lean start-up approach; building our own capabilities and digital product teams

06

New digital products are 'live' and in the hands of customers in 6+ launch markets; rolling out to all regions in 2020 and beyond



DRAUGHTMASTER

Taking DraughtMaster to the next level

Kaare Jessen, VP DraughtMaster

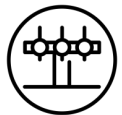
CMD – Meet the Management, Paris, 24 September 2019

The biggest change in draught beer for 50 years and it keeps evolving



TODAY

Our proprietary DraughtMaster platform is changing the way we and our customers think about draught beer.



GREATER VARIETY



BETTER RETURNS



LASTING QUALITY



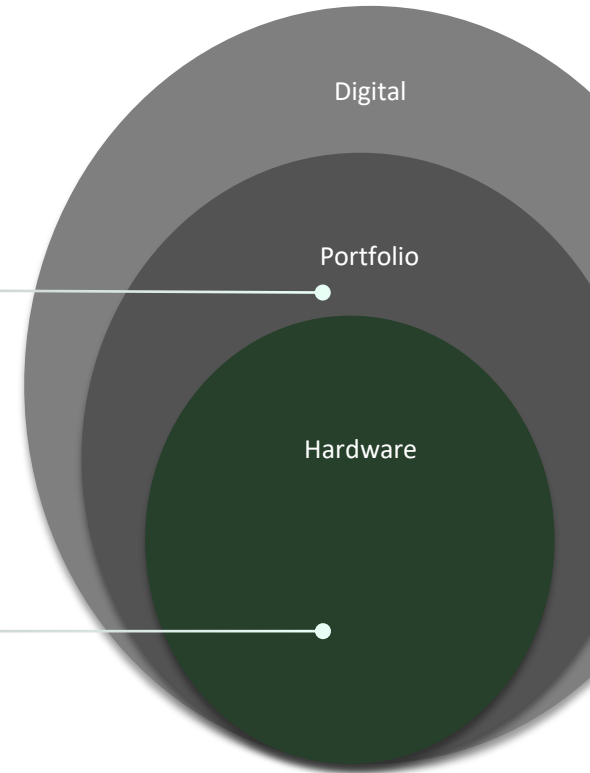
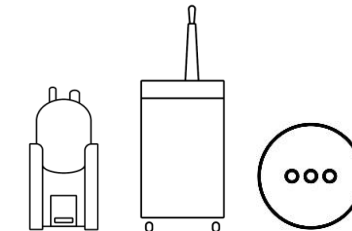
REFRESHED SERVICE



MORE BEER
MORE SPACE
MORE TIME

TOMORROW

This thinking will keep evolving and start to incorporate more layers.

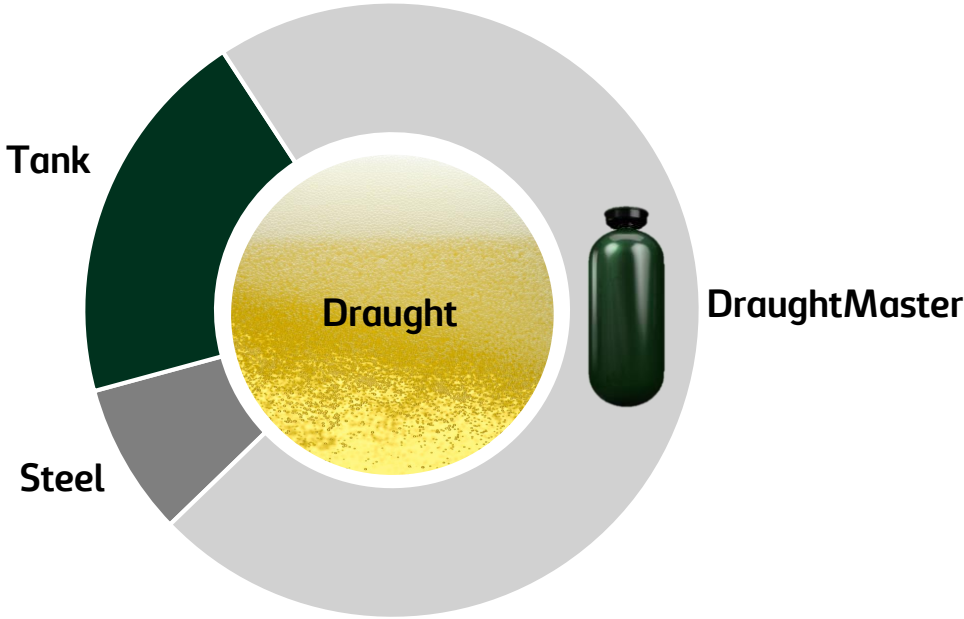
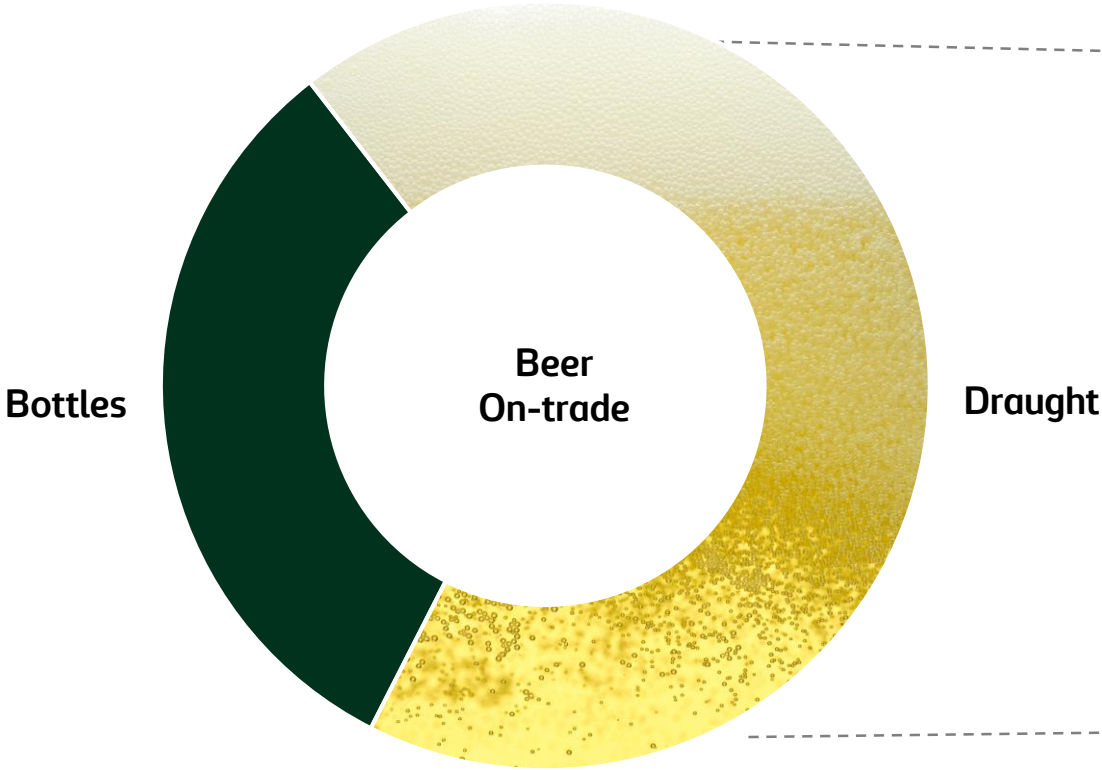


In countries that have converted, DraughtMaster is fundamental to the on-trade



When you say on-trade,
you say draught ...

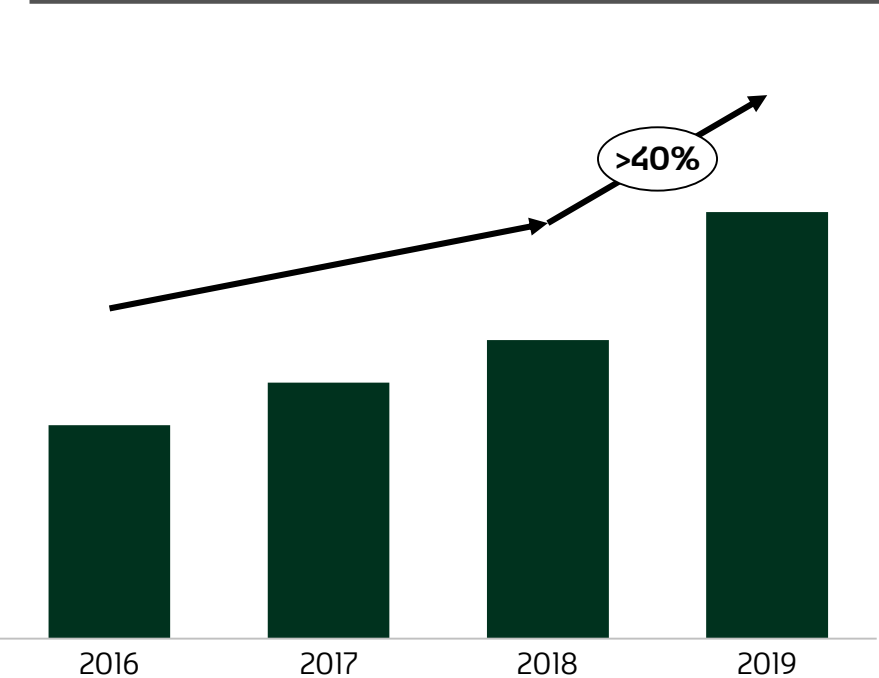
... and when you say draught,
you now say DraughtMaster



Continuous DraughtMaster growth across regions



Total DraughtMaster volume growth



NORDICS
Started full conversion



WESTERN EUROPE
Continued growth

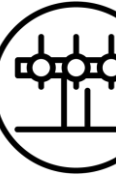


ASIA
Started to test growth opportunities

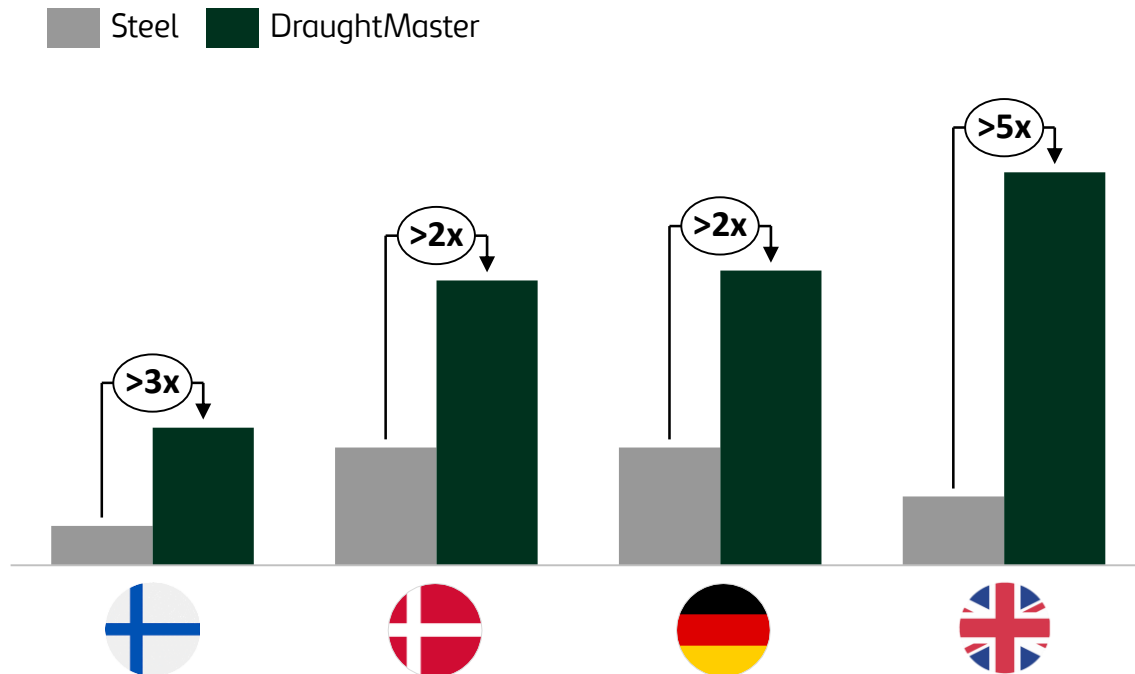
ROLLING OUT IN A MARKET IS COMPLEX

- Demanding transformation
- All functions need to engage/contribute
- Requires new thinking (technology play)

Proven results: DraughtMaster customers sell more beer at a higher margin and so does Carlsberg



Craft & Speciality share in DraughtMaster outlets is >2x compared to outlets using steel



Customer testimonies are positive, recognising variety and profit uplift

“

As we expanded **from 2 to 4 taps**, we were excited about whether sales would go up as desired, but with an **expansion to the range**, special glass for all taps – we quickly saw an increase in sales.

This means today that we have **increased sales** of draught beer by almost **90%**.

“

The new DraughtMaster system is a **fantastic boost** for draught beer, **in particular the selection of variants** supplied for the taps.

The guests praise the taste, and the freshness and the foam are top notch.

DraughtMaster gives us a unique proposition and takes the customer relationship further



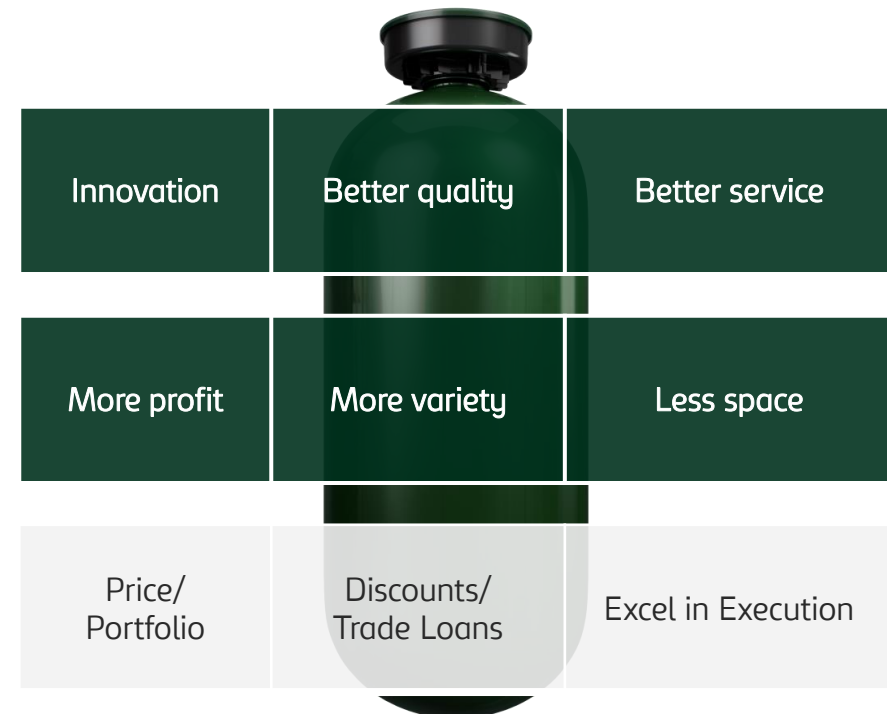
WITH STEEL KEGS

Competing in steel kegs allows for limited differentiation



WITH DRAUGHTMASTER

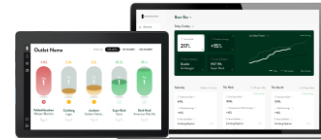
Today we offer a point of distinction – We can open new conversations beyond the existing benefits of steel kegs



DraughtMaster is a technology platform now expanding with a digital layer



Digital



Digital

Portfolio

Beer brands



Alcohol free beers

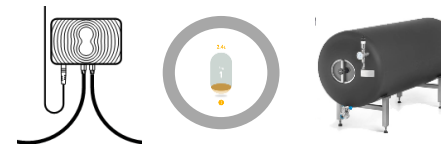
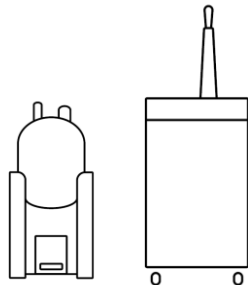


Ciders/Softbrews

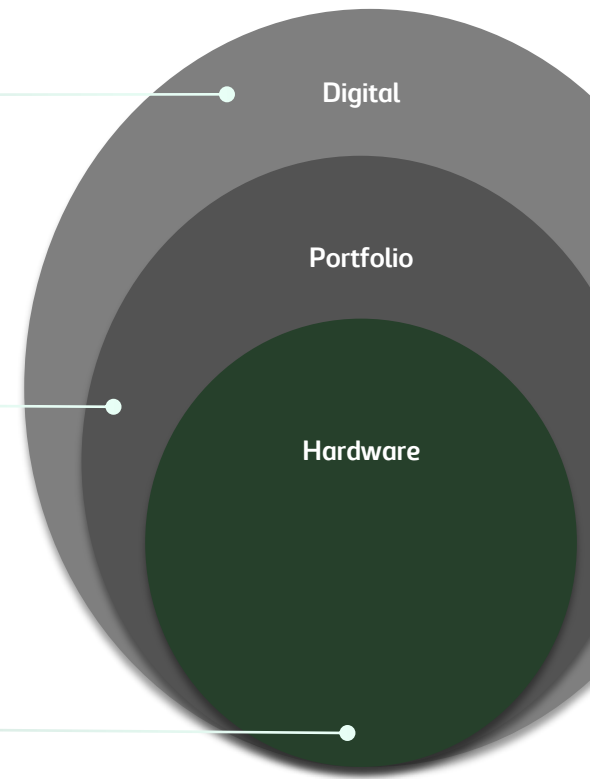


Portfolio

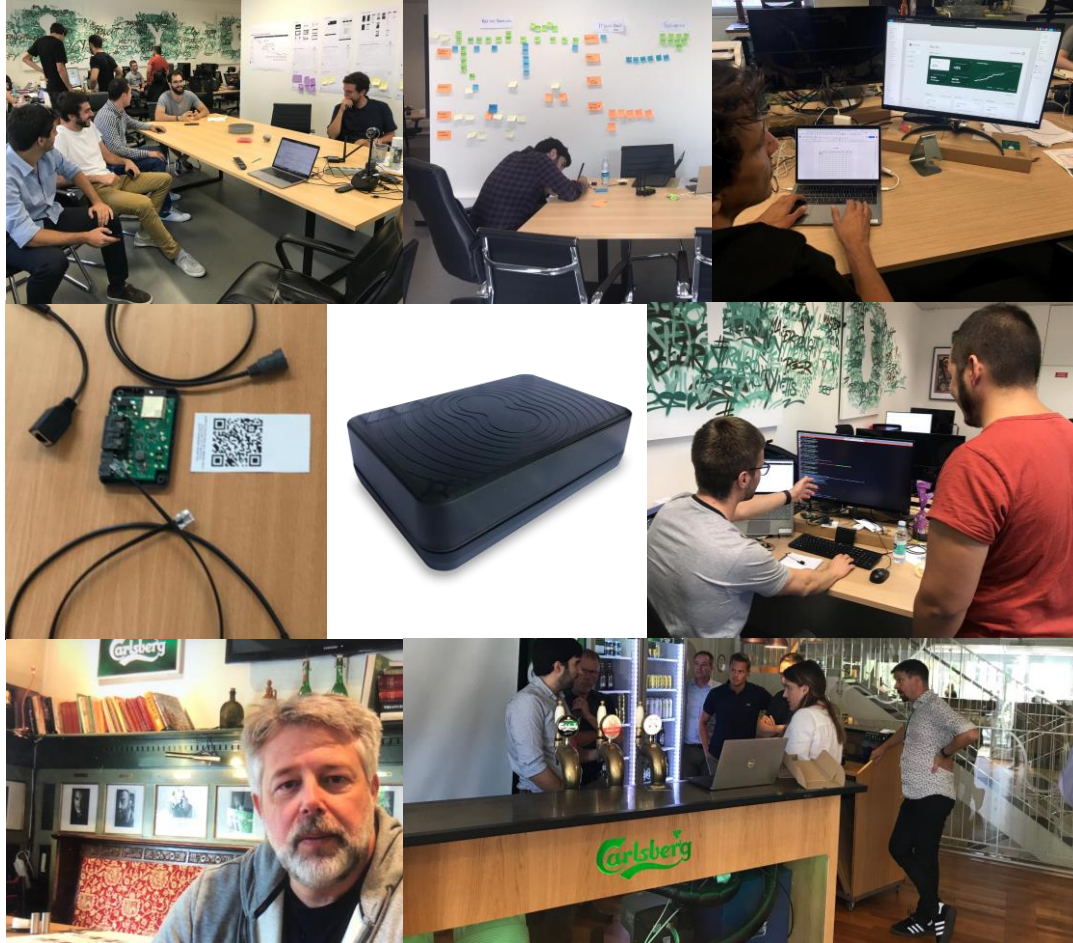
Hardware



Hardware



Agile ways of working adopted: New capabilities, iterative, customer centric



DEDICATED PRODUCT DEVELOPMENT TEAM WITH NEW CAPABILITIES

→ UI / UX, Hardware, Frontend, Backend, Data Science

BUILD, TEST & ITERATE FAST

→ Iterative agile approach in software development
→ First hardware prototype 3 weeks in

CUSTOMER CENTRIC APPROACH

→ Continuous customer engagement
→ Being tested in two markets as we speak

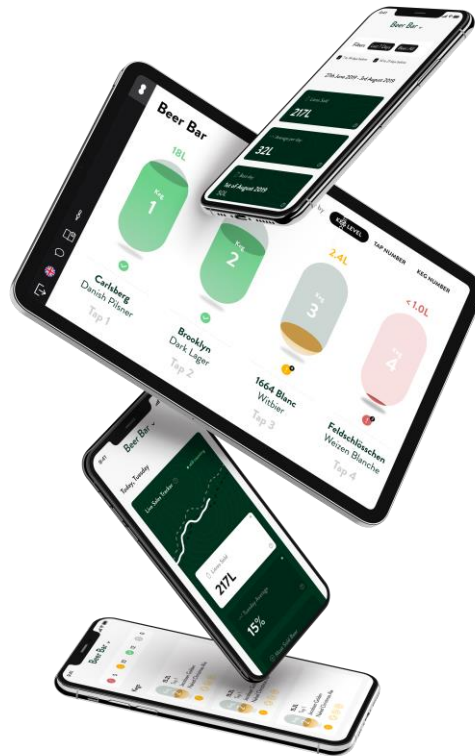
Introducing Digital DraughtMaster: Changing business for our customers and for us



PROPRIETARY
HARDWARE



COMPLEMENTED WITH
THE RIGHT SOFTWARE



TO UNLOCK THE VALUE OF
REAL-TIME CONSUMPTION DATA

→ Data to empower customers to better understand and manage their business

→ Unique dataset for Carlsberg to enable us to serve our customers better

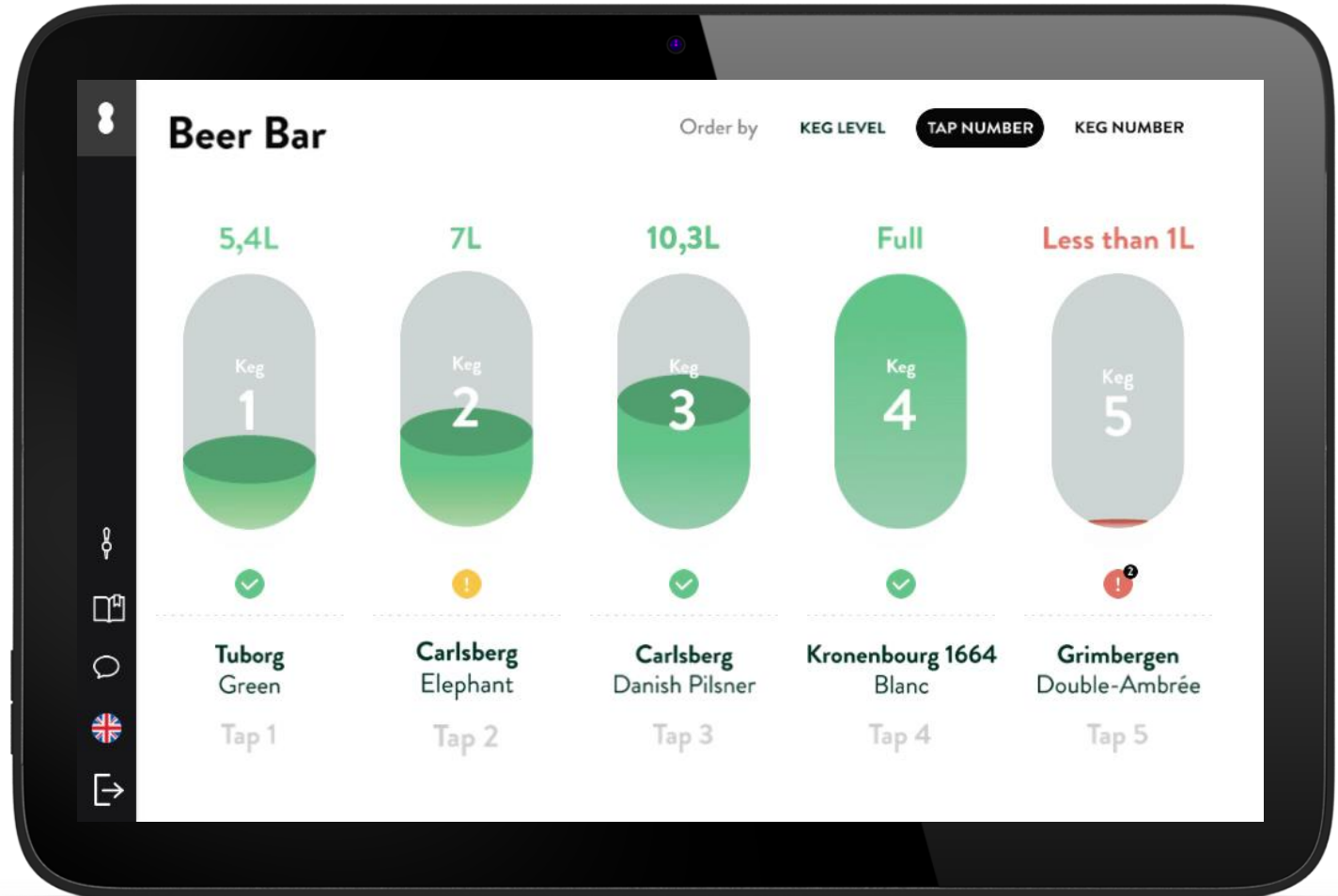
Future potential for staff: Smarter kegs & shift efficiency



→ **Real-time keg levels** at the bar to better **manage keg changes** and to sell the right beer at the right time

→ **Access to brand information** at one click to **promote beer brands** and offer **better service**

→ **Immediate support** via **chatbot and tutorials** to resolve any system related problems



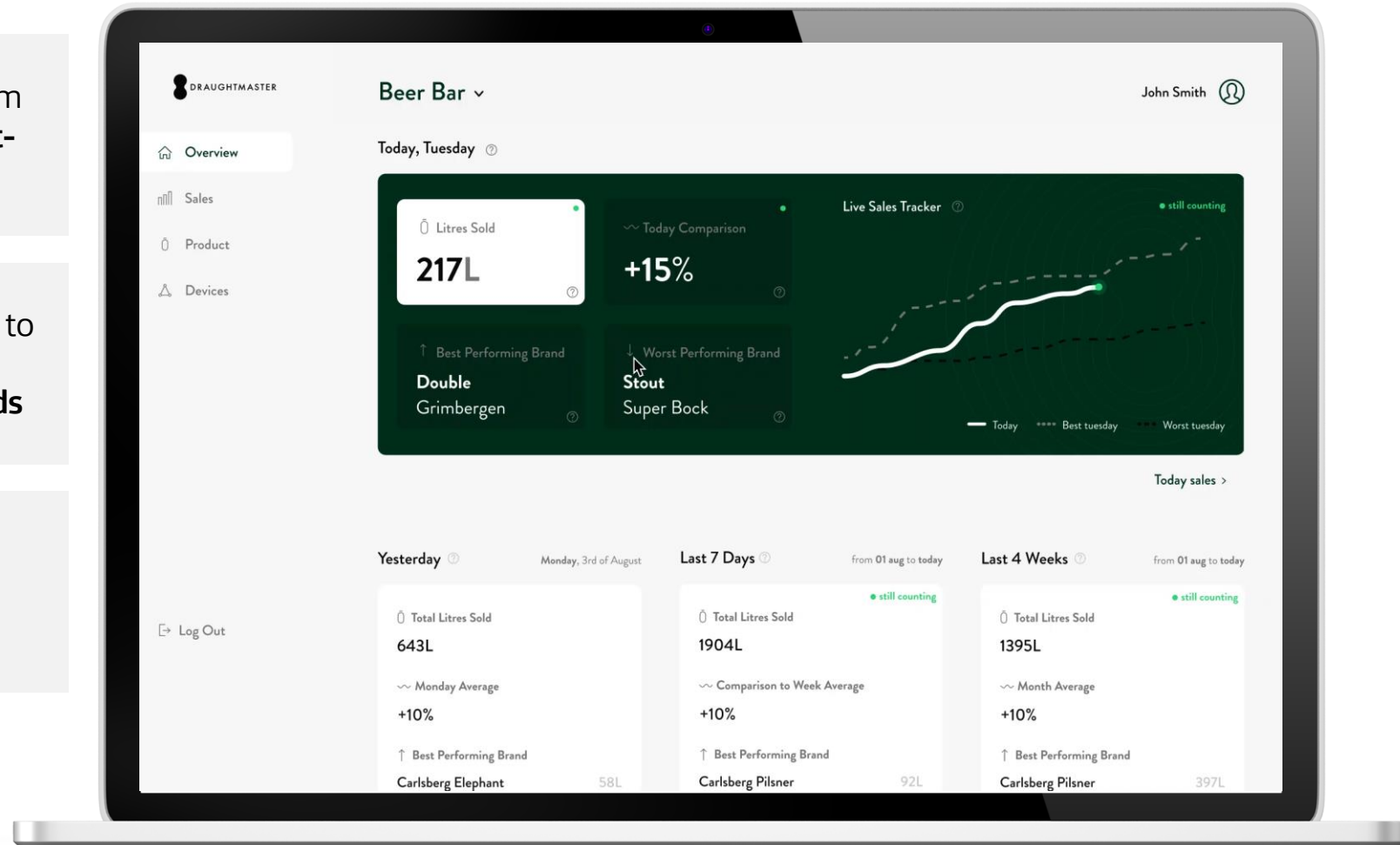
Future potential for managers: Data-driven performance insights



→ Track **real-time pouring performance** from any device and location relative to **outlet-specific benchmarks**

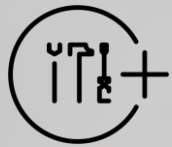
→ Examine **pouring performance over time** to better understand patterns and to identify **best and worst performing brands**

→ **Fact-based and richer** discussions with sales rep to **optimise portfolio and marketing decisions**



Future potential for our customers and Carlsberg: Technical Service, Commercial and Supply Chain

TECHNICAL SERVICE



PREVENTIVE & PREDICTIVE MAINTENANCE

- Detect potential irregularities at the customer before they happen
- Reduce customer break downs

REMOTE CHATBOT SUPPORT

- Answer customers questions 24/7 and reduce waiting time

COMMERCIAL



INSIGHTS-DRIVEN MARKETING CAMPAIGNS

- Optimise customer sales through more efficient campaigns

ENGAGE WITH CONSUMERS IN NEW WAYS

- Use digital lens for consumer facing brand activations and promotions

DATA-DRIVEN TAILORING OF OUTLET PORTFOLIOS

- Select customers' portfolio based on benchmarks

SUPPLY CHAIN



IMPROVED DEMAND PLANNING

- Predict demand more accurately and avoid shortages

AUTOMATIC REPLENISHMENT

- Simplify customers' life by ordering for them based on their own data

END TO END SUPPLY CHAIN VISIBILITY

- Let customers plan more effectively by letting them track delivery status

Welcome to the digital future of draught: Discover it at the alcohol-free brews lunch bar

