

TUBORG



Market

The Romanian beer market is a very competitive and dynamic arena, where four of the five biggest international breweries wield important marketing budgets.

In 2005, the Romanian beer market reached 13.8 million hL, up 5.2% on 2004. Growth in 2006 is put at around 10%.

Tuborg beer leads the super-premium beers in Romania, with a market share of over 50%. It is also the most preferred beer brand amongst Romanians (Source: IMRCG May 2006, urban area), and since 1999, Tuborg awareness reached 98% on the local market (Source: IMRCG May 2006).

From a consumer and purchase behaviour point of view, the beer market is clearly heading in two main directions: increased preference towards beers positioned in the premium segment, following increased living standards and consumer migration towards the local beer segment, as a result of increasing consumption on the PET segment.

Achievements

In 2004, Tuborg's "Regular guy" campaign won the Beverage Bronze EFFIE at the first Romanian EFFIE Awards. The communication strategy focused on showing that Tuborg endorses confidence amongst its target, offering excitement and the passion to live life to the full.

As a result of this campaign, Tuborg maintained its position as one of the best selling brands in Romania and the leader of premium beer segment. Compared to the previous year, Tuborg succeeded in increasing its sales volumes by 17.3%.

Tuborg Strong was launched in 2004 as a special line extension, aiming for leadership in the strong beers segment, the product containing 7.2% alcohol.

"The power sensation" campaign won the Silver EFFIE in 2005 in the alcoholic beverages

category, for the launch of the Tuborg Strong line extension. Shortly after its launch, Tuborg Strong imposed itself as an important player on the premium segment.

History

Tuborg factory (Tuborgs Fabrikker) was founded by a small group of pioneering Danish industrialists and financiers back in 1873, at North of Copenhagen, on a site, which was known as the Thuesborg estate. Philip W. Heymann was one of Tuborg's founders. He also coined the phrase "Stagnation is recession", which has been part of the company's philosophy ever since. In 1894, Tuborg merged with Carlsberg and the Tuborg brand became part of the product portfolio of Carlsberg Breweries. Today, Tuborg Gold is one of the best-selling beers worldwide, with Romania coming in third place in sales, after Denmark and Turkey.

Tuborg Romania was the first brewery project in Eastern Europe designed and constructed as a green-field project. With an initial investment worth some US\$ 55 million, the Tuborg brewery was built in just thirteen months and started production at the end of 1997, as one of the most modern breweries in Romania and within Carlsberg Breweries A/S also.

On December 1st 1997, the first "Made in Romania" Tuborg bottle was produced. Every year on December 1st, Tuborg Romania opens its doors to visitors and offers guided tours around the factory, becoming something of a tradition for the company.

Product

Tuborg Gold - "Live Life to the Full"

Created in 1895, the distinct brand Tuborg Gold was the Copenhagen beer producer's first big success, being present in over 100 countries. A flagship of freedom and non-conformism for the new generation, Tuborg Gold is a lager beer brewed from water, malt, hops and special yeast that gives Tuborg its unmistakable taste. Its alcohol content stands at 5%. Tuborg Gold has two line extensions: Tuborg Strong and Tuborg Christmas Brew. The slogan for Tuborg Gold is: "You and Tuborg" ("Tu și Tuborg").

Tuborg Strong - "Enjoy the Power Sensation"
Tuborg Strong is a beer with personality, especially created for powerful drinkers. A symbol of masculinity, Tuborg Strong is a strong beer (alcohol content 7.2%) and has a taste to make drinkers feel powerful and privileged. The slogan for Tuborg Strong: "Show what you can".

Tuborg Christmas Brew - "A Beer with a Special Holiday Taste"

Higher in alcohol than Tuborg Gold (5.6%) and with a brown-red colour, due to the high malt extract, Tuborg Christmas Brew is the Tuborg line extension for the winter holidays. With a rich tradition of over twenty years in Denmark, Tuborg Christmas Brew is the only specialty beer in Romania, designed for Christmas time. It is launched every year on the first Friday of November at midnight, at the same time all over the world, and it is available until New Years' Eve. The design of the 0.5L Tuborg Christmas Brew bottle, in keeping with the winter season, is making use of its distinctive blue colour. Tuborg Christmas Brew is not only a different product, but a different concept incorporating the holidays spirit.



All Tuborg products are available in returnable 0.5L bottles, non-returnable 0.33L bottles and 0.5L cans. Tuborg Gold and Tuborg Christmas Brew are also available in 5L kegs. Tuborg Gold is also available in 0,33L cans.

Tuborg is dedicated towards constant innovation in the field. It was the first beer brand to introduce cans in 1999, six-packs in 1999 and 5L kegs in 2001. The new packaging has proved very successful among Romanian consumers. In 1998, Tuborg introduced onto the market the first package including a special gift: five Tuborg 0.5L bottles and a free branded glass. Starting with 2000, Tuborg has launched the Tuborg Music Collection, a special eight-bottle pack with a free cassette or CD.

In 2002, Tuborg surprised its consumers with the Tuby cap, a special easy-open bottle cap with key, being the only beer on the Romanian market with this product feature.

Tuborg has also established itself as the first beer on the market to introduce its consumers to the 'peel-off' promotion mechanism. By scratching the back of the main Tuborg label, consumers can participate in Tuborg promotions and win instant prizes.

Tuborg Club was established in 1999, in response to the growing number of loyal Tuborg consumers, and now includes more than 200,000 members throughout the country.

Recent Developments

The year 2003 brought changes to the design of the Tuborg Gold bottle and can. The brand became sharper and more contemporary, with the new packaging design strengthening its premium status, international trademark and quality. The new Tuborg packaging aims to reinforce the brand's loyal consumer base by utilising stronger branding and colour. A new bottle shape was introduced along with other new elements, thus approaching the market in a contemporary and up-to-date way.

Tuborg Strong was launched in 2004 based upon three key elements: masculinity, power and special taste. All these were combined in a memorable launch event, which resurrected the legendary and fearless Eric the Red. The event, which took place in Bucharest, restaged a Viking landing in Romania, followed by a Viking party, where Tuborg Strong was touted as the beer for all conquests.

Promotion

The target audience represents successful, self-assured young men in the 25-35 age bracket,



with an enterprising attitude to life. Tuborg's sociability and spontaneity always make it fun to be around. The Tuborg consumer is male, calculated, with a successful career, a man who knows what he wants.

Starting 2002, all international image campaigns were developed by Romania, after winning the pitch against other countries. In 2002/2003, Tuborg developed the "Regular guy" campaign that was particularly well appreciated at advertising festivals for its creative approach. ATL promotion continued in 2004/2005 with the "Tuborg laws" campaign and, in 2006, the "Freedom" campaign was aired. With the market becoming more and more dynamic (product launches, innovative promotions etc), differentiation became the key. Therefore, the goal of the "Freedom" advertising campaign was to surprise consumers by "breaking the mould". The campaign was built around the key Tuborg value: freedom. It is based on two TV commercials that present how a Tuborg character enjoys life and manages not only to feel free from his daily constraints, but also from the constraints of people around him.

From its launch to present day, Tuborg has been present on the Romanian market and recognised by consumers as the beer with character.

Tuborg has also developed a series of music events, in order to bring the brand closer to the consumer. All music events are built under the "Tuborg - Music without limits" platform. Progress and freedom are the two main characteristics of its activities.

Music is used as a 'hook' to create the brand experience and bring consumers closer to the brand. Throughout Tuborg's brand life, music has been a key factor in below-the-line activities, accompanying consumers during the whole year, through concerts and performances by the most famous Romanian bands and artists.

The Tuborg International Festival is the first festival in Romania dedicated to a beer brand, bringing together all the brands in Tuborg Romania's portfolio, as well as fifteen international beer brands from Carlsberg Breweries' worldwide portfolio. In 2006, the fifth edition of the Tuborg International Festival was attended by more than 100,000 consumers. The festival takes place in Bucharest between the end of May and the beginning of June, having already become something of a tradition, with consumers able to enjoy 35 concerts featuring some of the most famous and well-loved bands from Romania.

Another strategy point is the annual Tuborg Summer Promotion - a vast promotion which each year involves over 18 million promotional labelled bottles. The promotion is communicated via TV, radio, press and a special line of POSMs.

Tuborg is constantly involved in local community support, developing relevant projects that aim at sustaining needy social groups.
"Together, much

closer to people" is a social program launched by Tuborg Romania in 2003, during the Easter holidays. The purpose of the program was to help those with special financial, social and medical needs. Important Romanian food companies and the local authorities, through the Bucharest Town Hall, have been involved in the program since the beginning. In 2005, the program widened its scope, reaching beyond Bucharest, and also took place during the Christmas period.

The 2005 edition of the International Tuborg Festival offered visitors the chance to contribute to the rehabilitation of the Western part of the country affected by floods. 1000 lei, from the price of each glass of beer sold during the festival, was donated to the people from Banat affected by the floods.

Since December 1st 1998, the Tuborg Factory has organised an Open Day at its Bucharest headquarters, allowing visitors to find out about the production process, and sample the company's products.

Brand Values

Freedom is the main value of the Tuborg brand, freedom of spirit and the power to feel free, regardless of social conventions or daily routine. The brand's conception of freedom is an active one: if you are really free, you can act to free others around you. Being progressive, easygoing, free and youthful, Tuborg is an informal brand, sociable and spontaneous, always optimistic and prepared to break through barriers.



www.tuborg.ro

THINGS YOU DIDN'T KNOW ABOUT

TUBORG

- Tuborg Strong is the first strong blonde lager beer produced locally in Romania.
- Tuborg is the only beer on the market with an easy-open cap
- Tuborg is the beer brand most closely associated with music (Source: IMRCG May 2006)
- Tuborg Christmas Brew is the only beer on the market dedicated to the winter season, only available at that time of year
- Tuborg Romania is the first brewery project in Eastern Europe designed and constructed as a green-field project.
- Today, Tuborg Gold is one of the best-selling beers worldwide, with Romania in third place in terms of sales, after Denmark and Turkey