

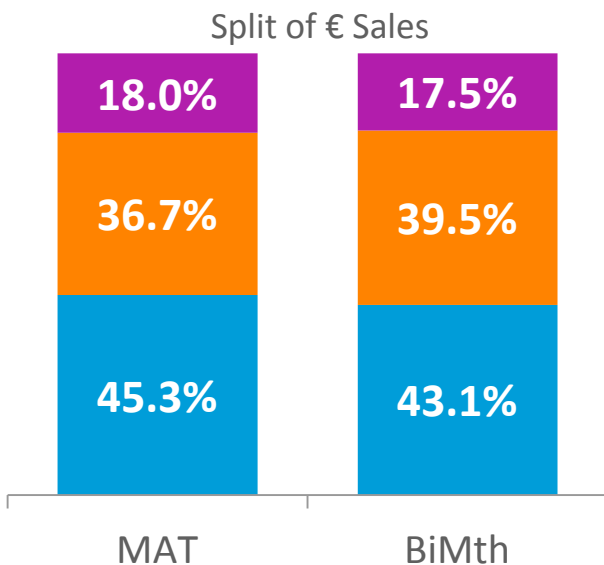
NIELSEN PULSE

Welcome to the latest edition of the Nielsen Pulse. We hope that you find this informative, and we welcome your feedback. Our Total ROI FMCG Market figure (right) is our fullest estimate for the ROI FMCG market, for more details on this, please see page 3. We have also included a list of the product groupings covered in each of the Super Product Classes, which you can find in the notes pages.

Total ROI FMCG Market* is valued at €15.66n +2.2% YOY

DEFINED IRISH FMCG MARKET - CHANNEL SPLIT JULY/AUG 2016

Convenience channel driving growth in latest 2 months as Multiples declines accelerate.

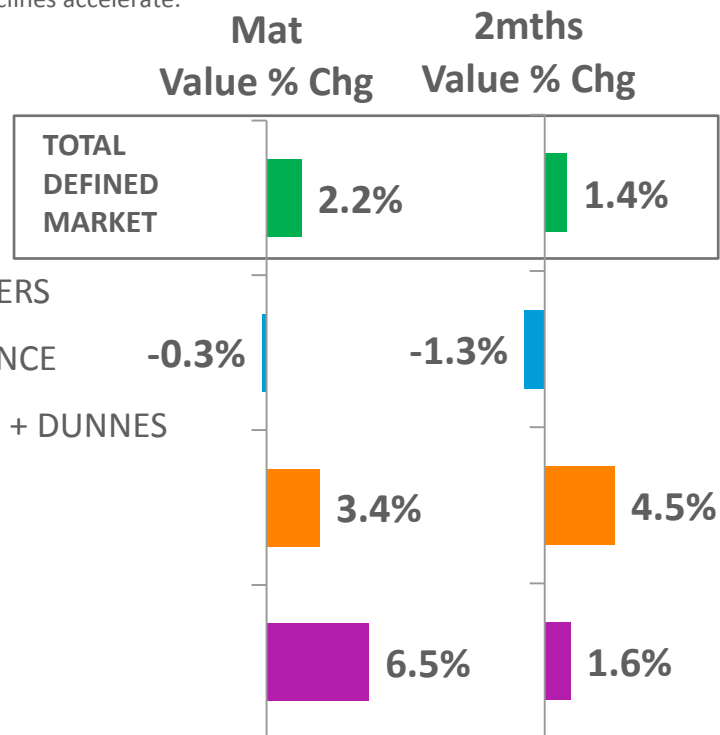


Source: Nielsen Strategic Planner, data to July/August 2016

Multiples + Dunes = Multiples ROI + Dunes Estimate

Convenience = Symbol Groups, Forecourts, Independents & Specialist Off-Licences*

Discounters = Aldi & Lidl (cash slip methodology)



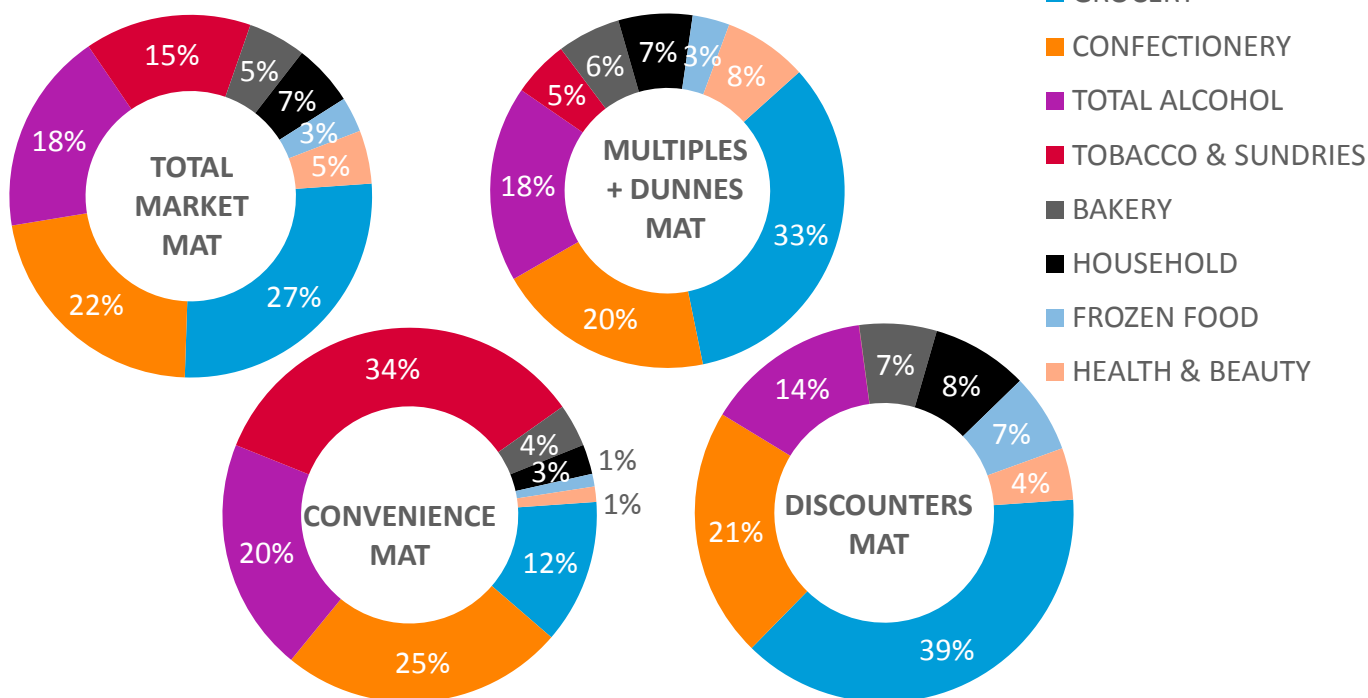
DEFINED SUPER PRODUCT CLASS PERFORMANCE

	VALUE			UNITS	
	MAT VALUE €M	MAT % CHG	2 MONTHS % CHG	MAT % CHG	2 MONTHS % CHG
TOTAL DEFINED MARKET	10,775.4	2.2	1.4	1.3	0.3
GROCERY	2870.1	0.6	-1.8	1.5	-1.2
CONFECTIONERY	2358.1	3.4	3.8	1.3	2.4
TOTAL ALCOHOL	1946.2	1.7	1.0	-0.2	-0.0
TOBACCO & SUNDRIES	1602.7	5.3	6.5	-0.8	-0.5
HOUSEHOLD	591.2	1.7	-0.9	3.7	2.4
BAKERY	556.4	1.1	-0.7	1.0	-2.3
HEALTH & BEAUTY	511.5	2.3	-0.7	2.9	0.1
FROZEN FOOD	339.3	-0.5	-1.3	1.3	-1.6

Source: Nielsen Strategic Planner, data to July/August 2016

DEFINED SUPER PRODUCT CLASS VALUE SHARE OF CHANNEL

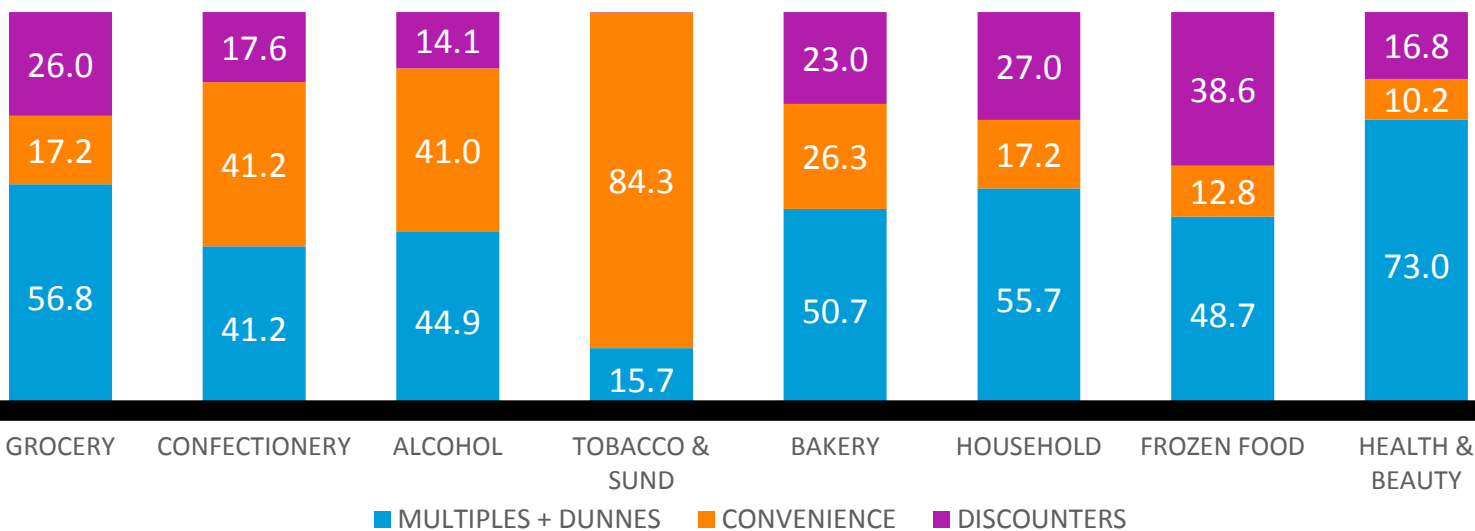
Channel shares remain mostly flat versus last edition.



Source: Nielsen Strategic Planner, MAT TY data to July/Aug 2016

DEFINED SUPER PRODUCT CLASS MAT € LOCATION OF SALES

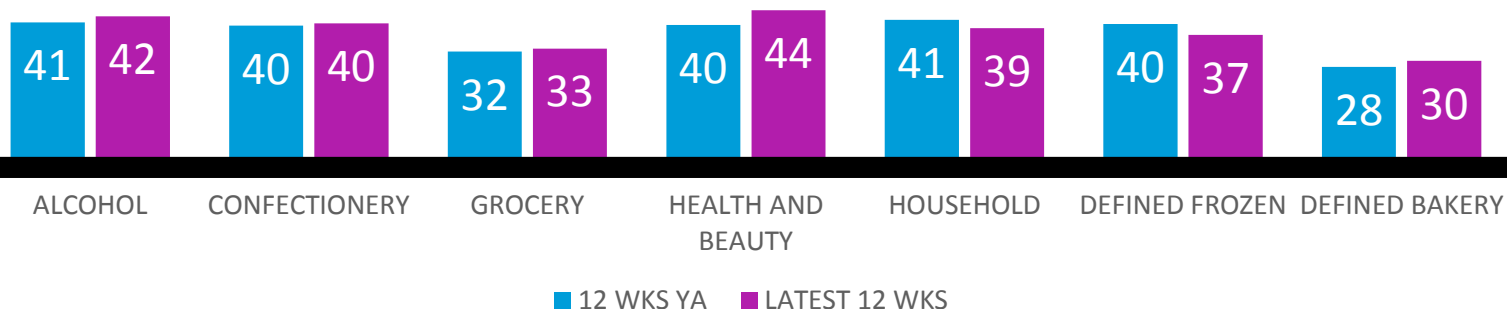
Discounters continue to gain in all categories but alcohol versus previous edition.



Source: Nielsen Strategic Planner, data to July/Aug 2016

VALUE PERCENTAGE SOLD ON DEAL

Increase in promotional pricing keeping value relatively flat across most categories despite volume falling.



Source: Nielsen Baseline, 12 w/e 11th of Sept 2016(Multiples only)

ABOUT NIELSEN PULSE

Nielsen Pulse uses the widest available data from Nielsen.

*The Nielsen Total ROI FMCG Market figure featured on page 1 is based on Nielsen Strategic Planner and also uses our Nielsen Total Store Read to enable us to account for categories not captured in Strategic Planner for all channels.

The remainder of the report uses Nielsen Strategic Planner only, which is the best available data from Nielsen MarketTrack, Nielsen ScanTrack and Nielsen Off-Licence read for FMCG categories, based on standard Nielsen Defined Product Classes.

Nielsen Total Store Read is the complete store read for Multiple retailers, and includes categories such as Deli, Produce, Fresh Meat and Poultry, In-store bakery, Newsagency, Horticulture, Mobile, & Durables **which are not included in Nielsen Strategic Planner.**

CHANNELS INCLUDED

Multiples + Dunnes = Multiples ROI + Dunnes Estimate

Convenience = Symbol Groups, Forecourts, Independents & Specialist Off-Licences*

Discounters = Aldi & Lidl (cash slip methodology)

**Specialist off-licences measured for Alcohol only*

ABOUT NIELSEN

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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AN UNCOMMON SENSE OF THE CONSUMER™

WHAT IS INCLUDED IN THE STRATEGIC PLANNER PRODUCT CLASSES

GROCERY

GROCERY	AMBIENT DESSERTS	GROCERY	DOMESTIC/EXOTIC PEPPERS	GROCERY	PETFOOD
GROCERY	BABYMILKS / MEALS AND RUSKS	GROCERY	DRIED PEAS	GROCERY	PICKLES
GROCERY	BARBECUE SAUCE	GROCERY	DRIED/FRESH PASTA NOODLES	GROCERY	PREPACK STUFFING MIXES
GROCERY	BLACK/WHITE PUDDING	GROCERY	GARLIC BUTTER	GROCERY	PREPACKED BACON
BAKERY	BREAKFAST CEREALS	GROCERY	HERBS		PREPACKED CONTINENTAL SAUSAGES
GROCERY	BROWN SAUCE	GROCERY	HONEY	GROCERY	PREPACKED SAUSAGES
GROCERY	BUTTER/SPREADABLE BUTTER	GROCERY	HOT FOOD DRINKS	GROCERY	PREPACKED SLICED MEAT
GROCERY	CANNED BAKED BEANS	GROCERY	ICE COFFEE	GROCERY	RELISH
GROCERY	CANNED FISH	GROCERY	INSTANT SNACKS	GROCERY	RICE
GROCERY	CANNED FRUIT	GROCERY	INSTANT/GROUND COFFEE	GROCERY	RTD FLAV MILK & SHAKES
GROCERY	CANNED PASTA	GROCERY	JAM	GROCERY	SAUCES
GROCERY	CANNED VEGETABLES	GROCERY	LOW CALORIE SWEETENERS	GROCERY	SPECIAL DIETARY PRODUCTS
GROCERY	CANNED/PACKET/FRESH SOUP	GROCERY	MARGARINE	GROCERY	STOCK & GRAVY MIXES
GROCERY	CHEESE	GROCERY	MARMALADE	GROCERY	TABLE SALT
GROCERY	CHILLED DESSERTS	GROCERY	MEAL KITS	GROCERY	TOMATO KETCHUP
GROCERY	CHILLED RICE DESSERTS	GROCERY	MEAT & VEGETABLE EXTRACTS	GROCERY	VINEGAR
GROCERY	CHOCOLATE SPREADS	GROCERY	MILK	GROCERY	WHITE FATS
GROCERY	CONDIMENTS	GROCERY	MINT SAUCE/JELLY		YOGHURT, FROMAGE FRAIS AND YOGHURT
GROCERY	COOKING OILS NON OLIVE	GROCERY	MUSTARD	GROCERY	SUGAR
GROCERY	CRANBERRY SAUCE	GROCERY	OLIVE OIL		
GROCERY	CREAM	GROCERY	OTHER TABLE SAUCES		
GROCERY	CURRY POWDER	GROCERY	PACKAGED TEA / TEA BAGS		
GROCERY	DEFINED FROZEN DESSERTS	GROCERY	PEANUT BUTTER		

FROZEN

FROZEN	FROZEN READY MEAT MEALS
FROZEN	FROZEN SAVOURY PRODUCTS
FROZEN	FROZEN CHIPS
FROZEN	FROZEN PREPARED POULTRY PRODUCTS
FROZEN	FROZEN PREPARED FISH PRODUCTS
FROZEN	FROZEN PREPARED MEAT PRODUCTS
FROZEN	FROZEN VEGETABLES
FROZEN	FROZEN POTATO PRODUCTS
FROZEN	FROZEN SNACK MEAT MEALS
FROZEN	FROZEN PIZZAS
FROZEN	FROZEN HERBS
FROZEN	FROZEN VEGETABLE READY MEALS
FROZEN	FROZEN PREPARED VEGETABLE PRODUCTS
FROZEN	FROZEN POULTRY - WHOLE/JOINT/CUT
FROZEN	FROZEN RED MEAT
FROZEN	FROZEN READY FISH MEALS
FROZEN	FROZEN GARLIC BREAD
FROZEN	FROZEN PASTRY
FROZEN	FROZEN VEGETABLE SNACK MEALS

PACKAGED BAKERY

BAKERY	POWDERED BAKING PRODUCTS
BAKERY	NON EDIBLE CAKE DECORATIONS
BAKERY	BREADCRUMBS
BAKERY	PAR BAKED PRODUCTS
BAKERY	BAKERY
BAKERY	CAKES
BAKERY	LIQUID BAKING PRODUCTS
BAKERY	SOLID BAKING PRODUCTS
BAKERY	CIABATTA/PANINI
BAKERY	FLOUR

WHAT IS INCLUDED IN THE STRATEGIC PLANNER PRODUCT CLASSES

HEALTH & BEAUTY

HEALTH & BEAUTY	ANTISEPTIC
HEALTH & BEAUTY	BABY POWDER/TALCUM POWDERS
HEALTH & BEAUTY	BABY WIPES
HEALTH & BEAUTY	BAR SOAP
HEALTH & BEAUTY	BATH ADDITIVES
HEALTH & BEAUTY	CARE MATS
HEALTH & BEAUTY	CONDOMS / LUBRICANTS
HEALTH & BEAUTY	COTTON WOOL
HEALTH & BEAUTY	COUGH AND COLD REMEDIES
HEALTH & BEAUTY	CREAMS/LOTIONS/OILS
HEALTH & BEAUTY	DENTURE PRODUCTS
HEALTH & BEAUTY	DEODORANTS
HEALTH & BEAUTY	DEPILATORY CREAMS
HEALTH & BEAUTY	DISPOSABLE NAPPIES
HEALTH & BEAUTY	FACIAL TISSUES
HEALTH & BEAUTY	FOOTCARE PRODUCTS
HEALTH & BEAUTY	HAIR COLOURANTS
HEALTH & BEAUTY	HAIR CONDITIONERS
HEALTH & BEAUTY	HAIR SPRAY
HEALTH & BEAUTY	HAIR STYLING AIDS

HEALTH & BEAUTY	HAND SANITISERS
HEALTH & BEAUTY	HANGOVER REMEDIES
HEALTH & BEAUTY	INCONTINENCE PADS
HEALTH & BEAUTY	INDIGESTION REMEDIES
HEALTH & BEAUTY	INTIMATE HYGIENE PRODUCTS
HEALTH & BEAUTY	LIQUID SOAP
HEALTH & BEAUTY	MEDICATED SHAMPOO
HEALTH & BEAUTY	MOIST WIPES
HEALTH & BEAUTY	MOUTHWASHES
HEALTH & BEAUTY	ORAL ANALGESICS
HEALTH & BEAUTY	RAZORS
HEALTH & BEAUTY	SANITARY PROTECTION
HEALTH & BEAUTY	SHAMPOO
HEALTH & BEAUTY	SHAVING & AFTERSHAVE
HEALTH & BEAUTY	SHOWER GELS
HEALTH & BEAUTY	SMOKING CESSATION AIDS
HEALTH & BEAUTY	SUN PREPARATIONS
HEALTH & BEAUTY	TOOTHBRUSHES
HEALTH & BEAUTY	TOOTHPASTE
HEALTH & BEAUTY	VITAMINS & MINERALS

HOUSEHOLD

HOUSEHOLD	AIR FRESHENERS
HOUSEHOLD	BAGS FOR FOOD
HOUSEHOLD	BATTERIES
HOUSEHOLD	BLEACH & LAUNDRY ADDITIVES
HOUSEHOLD	CARPET CLEANERS
HOUSEHOLD	CARPET/VACUUM FRESHENERS
HOUSEHOLD	CLING FILM
HOUSEHOLD	COOKING FOIL
HOUSEHOLD	DETERGENTS
HOUSEHOLD	DISHWASHER PRODUCTS
HOUSEHOLD	DISINFECTANT LIQUIDS
HOUSEHOLD	DRAIN CLEANERS
HOUSEHOLD	DUSTERS/CLEANING CLOTHS
HOUSEHOLD	FABRIC FRESHENERS
HOUSEHOLD	FABRIC SOFTENERS
HOUSEHOLD	FURNITURE POLISHES
HOUSEHOLD	GREASE PROOF PAPER
HOUSEHOLD	HARD SURFACE CLEANERS

HOUSEHOLD	IGNITION PRODUCTS
HOUSEHOLD	INSECT REPELLENTS
HOUSEHOLD	INSECTICIDES & RODENTICIDES
HOUSEHOLD	KITCHEN TOWELS
HOUSEHOLD	LIQUID HOUSEHOLD BLEACHES
HOUSEHOLD	METAL CLEANERS
HOUSEHOLD	OVEN CLEANERS
HOUSEHOLD	PREWASH/ LAUNDRY STAIN REMOVERS
HOUSEHOLD	REFUSE SACKS
HOUSEHOLD	RUBBER GLOVES
HOUSEHOLD	SCOURING PADS
HOUSEHOLD	TOILET CLEANERS
HOUSEHOLD	TOILET LIMESCALE REMOVERS
HOUSEHOLD	TOILET TISSUES
HOUSEHOLD	TOTAL LAV CARE
HOUSEHOLD	WASHING UP LIQUIDS
HOUSEHOLD	WATER SOFTENERS
HOUSEHOLD	WINDOW CLEANERS

WHAT IS INCLUDED IN THE STRATEGIC PLANNER PRODUCT CLASSES

TOTAL ALCOHOL

ALCOHOL	TABLE WINES
ALCOHOL	CHAMPAGNE
ALCOHOL	PORT
ALCOHOL	VERMOUTH
ALCOHOL	SPARKLING WINES
ALCOHOL	TONIC WINES
ALCOHOL	SHERRY
LONG ALCOHOL	LAD
SPIRITS	OTHER TYPE SPIRITS
SPIRITS	CREAM LIQUEURS
SPIRITS	WHISKEY
SPIRITS	VODKA
SPIRITS	RUM
SPIRITS	GIN
SPIRITS	BRANDY

TOBACCO/SUNDRY

TOBACCO/SUNDRIES	ELECTRONIC CIGARETTES
TOBACCO/SUNDRIES	CIGARS
TOBACCO/SUNDRIES	LOOSE TOBACCO
TOBACCO/SUNDRIES	PIPE TOBACCO
TOBACCO/SUNDRIES	TOBACCO ACCESSORIES
TOBACCO/SUNDRIES	CIGARETTES

CONFECTIONERY

CONFECTIONERY	BISCUITS
CONFECTIONERY	SQUASHES & CORDIALS
CONFECTIONERY	CBCL
CONFECTIONERY	CONFECTIONERY
CONFECTIONERY	ICE CREAM
CONFECTIONERY	PREPARED / SAVOURY DIPS
CONFECTIONERY	CRISPS/SNACKS/TUBES
CONFECTIONERY	GRANOLA BARS
CONFECTIONERY	NUTS
CONFECTIONERY	POPCORN
CONFECTIONERY	SPORT/ENERGY
CONFECTIONERY	CHEWING GUM
CONFECTIONERY	MINERAL WATERS
CONFECTIONERY	CARBONATED SOFT DRINKS
CONFECTIONERY	FRUIT JUICE