



# EFES

ANADOLU EFES  
BREWERY AND MALT INDUSTRY INC.  
TURKEY BEER OPERATIONS

SUSTAINABILITY  
REPORT

# '10





# Türkiye'de bira bu kapağın altındadır.



Türk basketbolunun sıçramasında, futbolda Milli Takımımızın dünya çapında başarılarla uzanmasında, Türk sinemasının büyük atağında, tiyatroların seyirciyle buluşmasında, Türk turizminin gelişmesinde, kültürel değerlerimizin arkeoloji ile gün yüzüne çıkmasında, blues ve rock festivallerinin coşkusunda, hep O'nun payı var.

**Kısacası, bu kapağın altında çok daha fazlası var!**





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About the Report



## About the Report



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Ever since the founding of our establishment, we have made an effort to shape our activities with awareness of sustainability and of being a good corporate citizen. As a company, we give importance to establishing a positive and constructive dialogue with the stakeholders within our field of activity, based on the principle of mutual benefit. As an extension of this, we try to observe the expectations of our stakeholders at our events.







This report has been prepared with the aim of presenting to our stakeholders the sustainability performance of Anadolu Efes Beer and Malt Industry A.S. over the 15-month period between January 1st 2008 and March 31st 2009. In this first published sustainability report, we aim to present a full portrait of our work principles and sustainability performance to our stakeholders, as well as our projections about our future vision.

### **We Formed Our Reporting Principles According To International Standards**

In order to provide transparency and accountability, which are basic principles of corporate sustainability, we are aware of the need for a report project that adheres to international standards, defining social, economic and environmental responsibilities, sharing the results of these efforts, and meeting the expectations of our stakeholders. To this aim, as a result of the work we began in 2009, we chose to draw up the report according to G3 principles published in the year 2003 in Global Reporting Initiative (GRI). Our choice was greatly affected by not only the fact that the GRI principles are the most widely-applied and respected reporting guidelines in the world, but that they allow the performance which we obtained with our efforts to be seen and compared in the clearest manner. For this reason, we evaluate this sustainability report project as not only an effective accountability practice but also as a performance improvement tool.

### **The Content of our Report Defines our Corporate Priorities**

In this first reporting project of ours, we took the "C" reporting level, as defined by GRI principles, as our basis. Thus we ensured that the topics comprising our reporting content maintained optimum balance in the areas of society, environment, economy and ethics.

When drawing up the headings within the report, we took the principle of materiality as our basis, as stressed in the GRI reporting guidelines. For this reason we formed a study group when starting our reporting project, with representatives from all departments of our corporate entirety. This study group sensitively handled topics which our company encounters at present and could encounter in the future, resulting from the nature of the industry, and reflecting the expectations of our stakeholders. As a result of these endeavors, "material issues" were defined, to be focused on for our company's sustainable development and the fulfillment of the stakeholders' expectations. These topics, which form the fundamental basis of our performance, also form the fundamental contents of our sustainability reporting endeavor.

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# About the Report

As this is our first sustainability reporting endeavor on a corporate scale, our aim with the current performance and future goals in the report is not only to share them with our stakeholders, but to use them as a basis for our performance revelations in the reports we plan to publish in the future. When forming the content for the report, we not only dealt with the details of performance notifications relating to our material issues, but included other fundamental sustainability indicators with the aim to present our stakeholders with a comprehensive framework relating to our sustainability performance.

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## Our Reporting Scope

We define our company as a vast beer group with production facilities in 5 countries across a region stretching from the Adriatic to Pasific Ocean, its products consumed over 60 countries. We believe that the system we offer creates high and sustainable value. Our goal is to develop more effectively this feature of ours within our geographical region of operation.

Creating an international system requires not only the formation of successful models for production and marketing operations, but highly effective management tools which work with the same degree of excellence in all areas of activity. It is from this perspective that we regard this sustainability reporting endeavor. We aim to produce a reporting sytem which includes all our operations, carries out performance notifications with the same degree of excellence and the same scope in each geographical unit, and will be able to be instantaneously implemented in the new operational units which we acquire in the future.

In this first reporting implementation of ours, we aimed to lay the foundations for the system we are trying to form. For this reason, we saw fit to conceive our project within a framework that would form an example for our company's fields of activities, that would present a qualified statement about our company and sustainability activities to our stakeholders, and would test a reporting system to be developed for the company in general. In light of these goals, although there are statements about the Efes Beer Group in general, the scope of our first sustainability report is the **"Anadolu Efes Brewery and Malt Industry A.S. Turkey Beer Operations"**. In terms of reflecting Turkey's beer operations as a whole, all operations described in the report, and the performance and goal notifications related to them, use data belonging to Anadolu Efes Beer and Malt Industry A.S., as well as to Efes Pazarlama ve Dagitim Ticaret A.S. ve Tarbes Tarim Ürünleri ve Besicilik Sanayi ve Ticaret A.Ş., the shares of which belong entirely to Anadolu Efes. Unless there is a warning to the contrary, evaluations of the performance notifications within the report should take this scope into account.

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The report is provided via our internet website, [www.efespilsen.com.tr](http://www.efespilsen.com.tr), for all our stakeholders to view in PDF format. You can send your requests for more detailed information about the report, your views and ideas to the relevant staff members by using the contact details provided within the report.







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## 2 Letter from the General Manager



## Letter from the General Manager

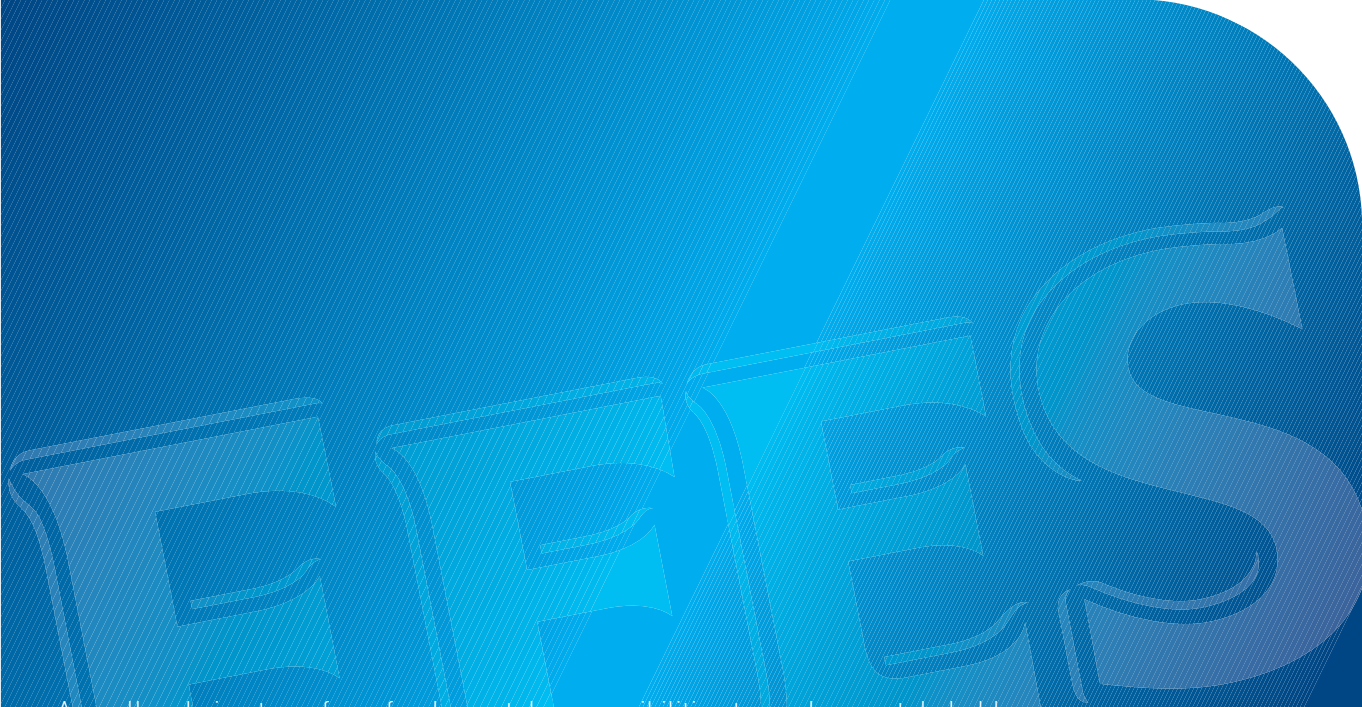


We are a large beer group, with production facilities in 5 countries across a region spanning from the Adriatic to Pacific ocean, its products consumed over 60 countries. Ever since the founding of our establishment, we have made an effort to shape our activities with awareness of sustainability and being a good corporate citizen. As a company we give importance to establish a positive and constructive dialogue with the stakeholders within our field of activity, based on the principle of mutual benefit. As an extension of this, we try to observe the expectations of our stakeholders in all our endeavors.

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“ In the light of our vision - ‘To be the world's strongest, independent regional beer company’ - we carry out our efforts related to our mission of increasing our power and influence within the drinks industry and of contributing to the raising of social standards of living, without compromising on the principles which we have defined as our corporate values: ‘Cooperation, entrepreneurship, modernity and aiming for excellence.’ ”

Starting its operations with the first two breweries it opened in Turkey in the year 1969, Anadolu Efes today has reached the status of an international power, with 14 breweries, 6 malt and 1 hops production facilities, distributed over 5 countries. Our operations reach a consumer group of almost 500 million over a broad geographical area. Being one of the most important points of support in Anadolu Group's success story, and one of their greatest elements, is a factor that increases the significance and sensitivity of our business



As well as being two of our fundamental responsibilities towards our stakeholders, transparency and accountability are important management principles for us. We believe that these two principles are cohesive elements of our attitude and activities, building our corporate sustainability. Within this field we closely monitor emerging management tools and practices, and try to rapidly integrate them into our corporate structure. For this reason, we have decided to start a sustainability reporting project, which is a tool for advanced transparency and accountability applied among leading companies in Turkey and the rest of the world.

As a result of this endeavor, "material issues" were defined, to be focused on for our company's sustainable development and the fulfillment of the stakeholders' expectations. These topics, which form the fundamental basis of our performance, also form the fundamental contents of our sustainability reporting basis.

Created with this concept in mind, our sustainability reporting system has been divided in three parts:

- The main heading "The Sustainability of our Work", with detailed explanations of our beer production, management concepts, employees, suppliers and products, as sub-headings
- The main heading "Environmental Awareness", with details about Anadolu Efes' sustainable environment concept under relevant sub-headings
- And finally, the main heading "Our Community Relations", revealing our contributions to the local economy and social investments, which we have been implementing continuously for years.

Spanning the 15-month period between January 1st 2008 and March 31st 2009, with a full portrait of our work principles and sustainability performance, as well as aiming to show our projections about our future vision, we present our Sustainability Report to our stakeholders.

Yours faithfully,

Tuğrul Ağırbaş  
Efes Türkiye General Manager

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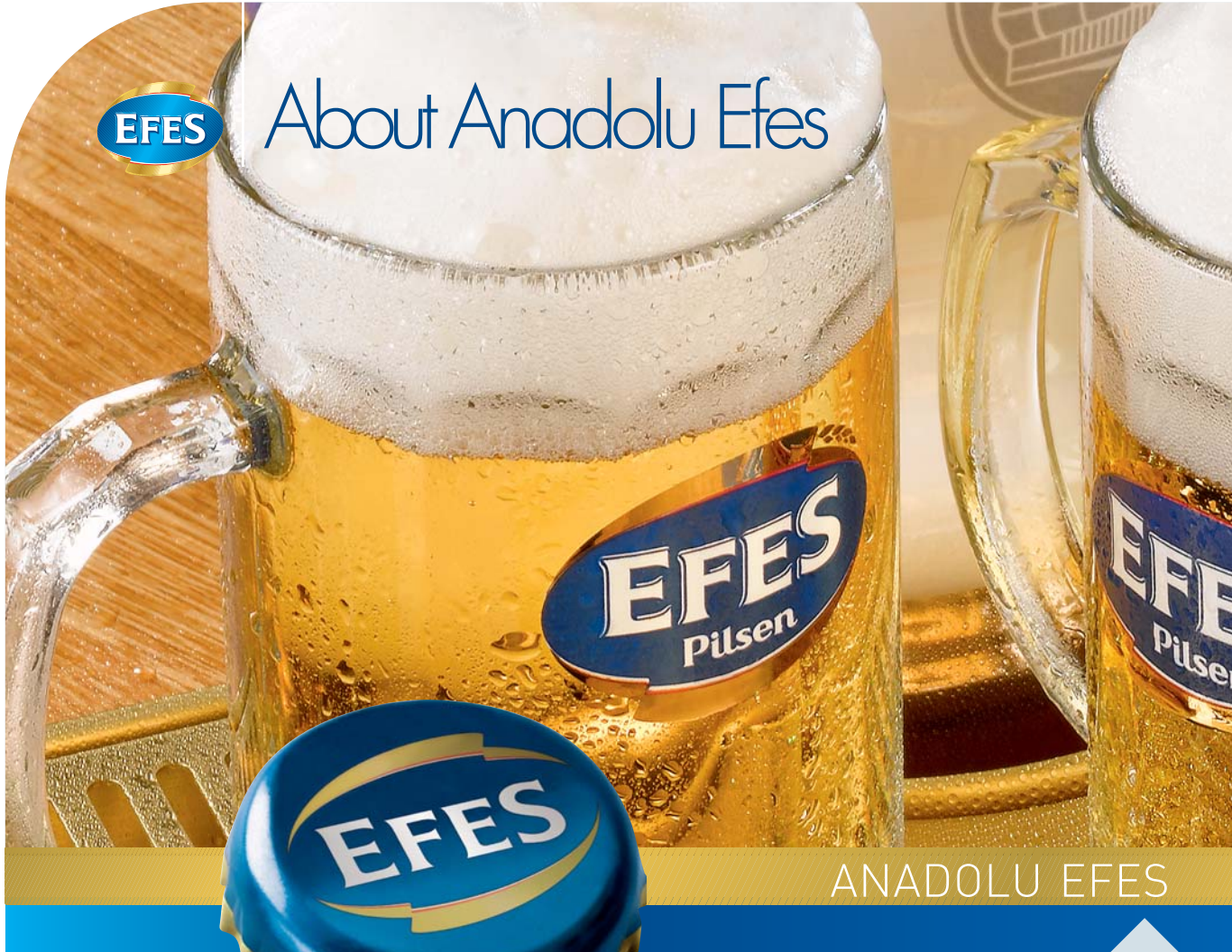




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# 3 About Anadolu Efes



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Anadolu Efes Beer and Malt Industry A.S., with its associates and partners, is a system of companies which produces and markets beer, malt and soft drinks within a geographical region comprising Turkey, Russia, the Commonwealth of Independent States, Southeast Europe and Middle Eastern countries. Anadolu Efes carries out the drinks industry operations of Anadolu Industry Holding A.S., which is one of Turkey's largest holding companies.

Commencing its operations with the two breweries in 1969, Anadolu Efes is not only the domestic beer market leader, but is the majority shareholder of Efes Breweries International N.V., which is established in the Netherlands and carries out international beer operations, and the largest partner of Coca-Cola Icecek A.S. (CCI), which carries out Coca-Cola's operations within Turkey and abroad.

“

**In its 40th year, Anadolu Efes has reached the status of multinational power, with 16 breweries, 6 malt production facilities and 20 bottling plants, distributed over 14 countries; their operations reach a consumer group of almost 500 million over a broad geographical area. Being one of the most important points of support in Anadolu Group's success story, and one of their greatest elements, Anadolu Efes maintains its operations under two main structures, the Beer Group and the Soft Drinks Group.**

”



One of Turkey's most important and largest holding companies, the Anadolu Group laid its foundations at the start of the 1950s, when the Ozilhan and Yazici families combined their hard work and broad-ranging vision.

Its fundamental scope of operations comprising drinks, automotive, finance, food, stationary and office supplies, the Anadolu Group has recently expanded its range of activities with investments in the IT, electronics, energy, food and health industries.

**The Anadolu Group has adopted a vision to ensure their continued existence in the 21st century: "The star which ties Anatolia to the world and the world to Anatolia"; over recent years it has carried out all its initiatives and structuring in the light of this vision.**

With one or more famous brand names that we encounter almost every day during our daily lives, the Anadolu Group successfully maintains its globalization process, involving its strategy for expanding abroad, and cooperating and forming partnerships with multi-national companies.

**The Anadolu Group has 43 production plants and 18054 employees working at 70 companies, from the Adriatic to the Pacific.**

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## ANADOLU EFES

Celebrating its 40th anniversary in 2009, Anadolu Efes holds the leading position in Turkey, Moldova and Georgia, second position in Kazakhstan, and fourth position in Russia, among the countries where it carries out its beer operations. It also owns 28% of the shares of Serbia's third largest beer operation. In terms of sales volume, Anadolu Efes is Europe's fifth largest beer company.

20 years ago, Anadolu Efes owned 63% of the beer market in Turkey; with an average annual growth rate of 8% over the period discussed, and it had achieved ownership of 86% of the market by the end of 2008 and was a clear market leader. Anadolu Efes, who bought Lomisi Ltd., the leading beer company in Georgia, in the year 2008, has today expanded its field of operations with a total of 16 breweries, 6 malt, and 1 hops production facility spread over 5 countries. Furthermore, by forming a strategic partnership with Heineken International B.V. in Serbia, it holds 28% ownership of the third largest beer company operating in this market. As of the end of 2008, the company has increased its total beer production capacity to an approximate annual 37.2 hectoliters (including Serbia), and its total malt capacity to approximately 254,000 tons.

**As of the end of 2008, Anadolu Efes' main brand name, Efes, is exported to almost 60 countries, where it is consumed with appreciation.**

It is one of the company's strategic priorities to carry out value-creating purchases within the geographical region where Anadolu Efes' beer operations are focused, comprising Turkey, Russia, CIS and Southeast Europe.

### Anadolu Efes' Strengths

- Europe's fifth largest beer producers.
- Sustainable cash flow obtained from Turkish beer operations, with a consistent, strong and healthy performance
- Rapidly growing international beer operations
- Rapidly growing soft drinks operations in Turkey and abroad
- The clear leading position it holds in the Turkish beer market
- The strong and growing status it holds in the Russian market, which is the third largest beer market in the world
- An experienced, authoritative management team with a deep background knowledge of beer operations
- The strong recognition, brand loyalty, prestigious dealers and distributor network of the 'Efes' brand



## Vision and Mission

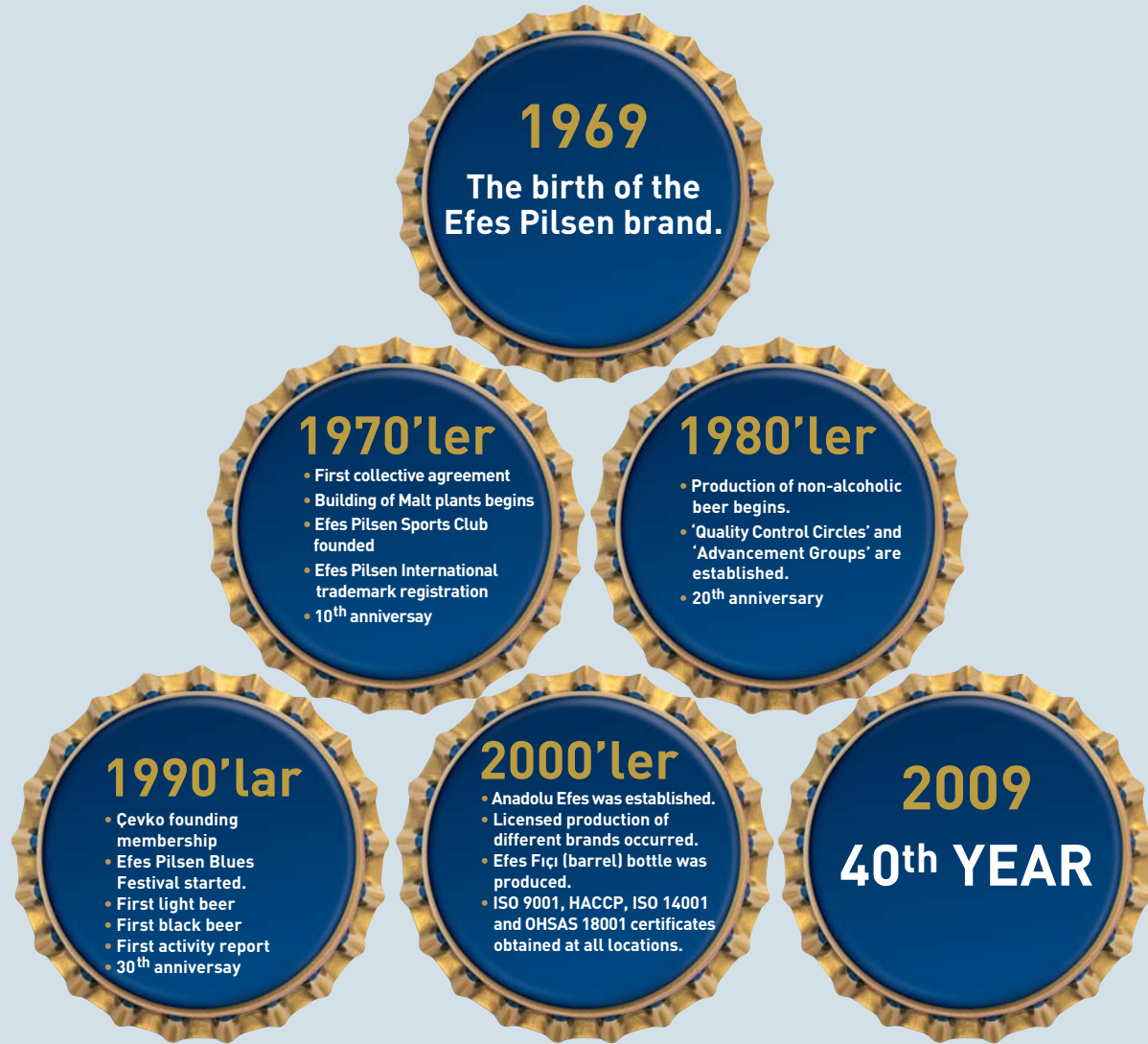
Anadolu Efes' vision for its beer operations is to be the world's most powerful independent regional beer producer.

Anadolu Efes considers its basic mission as being to increase its strength and influence in the drinks sector, and contribute to the community's living standards.

### Our Strategic Priorities;

- To ensure long-term, sustainable and profitable growth
- To expand the field of activities with value-creating purchases
- To acquire sales volume growth with market growth.

### 40 Years with Efes Pilsen



<sup>1</sup> You may reach detailed information about the historical development of Anadolu Efes and Efes Pilsen brands from our annual report and the sites, [www.anadoluefes.com](http://www.anadoluefes.com) and [www.efespilsen.com.tr](http://www.efespilsen.com.tr)



# About Anadolu Efes

## Capital and Partnership Structure

Anadolu Efes' registered equity ceiling is 900,000,000 TL, and its issued capital is 450,000,000 TL. Yazıcılar Holding is a public company (YAZIC.IS) in the Istanbul Stock Exchange (ISE). One of the largest companies traded on the ISE as of 2008, Anadolu Efes (AEFES.IS) is a company with a high rate of foreign investors in its freely circulating shares. With a higher rate of foreign corporate investors than the ISE average since it began trading in the year 2000 (72% as of December 2008), Anadolu Efes allows trading by not only foreign established corporate investors, with its Level-1 ADR (AEBZY/ Cusip No: 032523102), but also trading to a certain level by individual investors on the OTC market.

Company shareholders as of 31 December 2008 and 31 December 2007, and the proportions of their shares:

	31 December 2008		31 December 2007	
	Amount (000 TL)	%	Amount (000 TL)	%
Yazıcılar Holding A.Ş.	139.082	30,91	139.082	30,91
Özilhan Sınai Yatırım A.Ş.	78.910	17,54	78.746	17,50
Anadolu Endüstri Holding A.Ş.	35.292	7,84	35.292	7,84
Public and Other	196.716	43,71	196.880	43,75
	<b>450.000</b>	<b>100,00</b>	<b>450.000</b>	<b>100,00</b>





## Turkey Beer Operations<sup>2</sup>

Consolidated Income Statements for the Years Ended 31.12.2008 and 31.12.2007  
Prepared in Accordance with IFRS as per CMB Regulations (Million TL)

	2007/12	2008/12
Sales Volume (Million Hectoliters)	7,6	8,5
Net Sales	967,0	1.182,1
Gross Profit	651,4	794,0
Profit From Operations	304,9	410,8
Financial Income / Expense	40,7	(0,4)
Continuing Operations Profit Before Tax	345,6	410,4
Provision for Taxes	(66,9)	(79,7)
Net Income	278,7	330,7
<b>EBITDA</b>	<b>401,8</b>	<b>511,8</b>

NOTE: EBITDA comprises of Profit from Operations (Excluding other Operating Income / Expense), depreciation and other relevant non-cash items up to Profit from Operations.

Highlighted Balance Sheet Items as of 31.12.2008 and 31.12.2007  
Prepared in Accordance with IFRS as per CMB Regulations (Million TL)

	2007/12	2008/12
Cash, Cash Equivalents and Investment in Securities	159,8	224,4
Trade Receivables	161,5	184,9
Inventories	90,3	123,2
Other Assets	28,0	28,8
<b>Total Current Assets</b>	<b>439,6</b>	<b>561,3</b>
Investments	1.248,8	1.226,2
Property, Plant and Equipment	301,5	328,0
Other Assets	19,0	18,1
<b>Total Non-Current Assets</b>	<b>1.569,3</b>	<b>1.572,4</b>
<b>Total Assets</b>	<b>2.009,0</b>	<b>2.133,7</b>
Trade Payables	45,3	57,1
Other Liabilities	116,6	124,4
Short-term Borrowings	109,0	75,9
<b>Total Current Liabilities</b>	<b>270,9</b>	<b>257,4</b>
Long-term Borrowings	58,2	-
Other Liabilities	119,5	136,9
<b>Total Non-Current Liabilities</b>	<b>177,7</b>	<b>136,9</b>
<b>Shareholders' Equity</b>	<b>1.560,3</b>	<b>1.739,4</b>
<b>Total Liabilities and Shareholders' Equity</b>	<b>2.009,0</b>	<b>2.133,7</b>

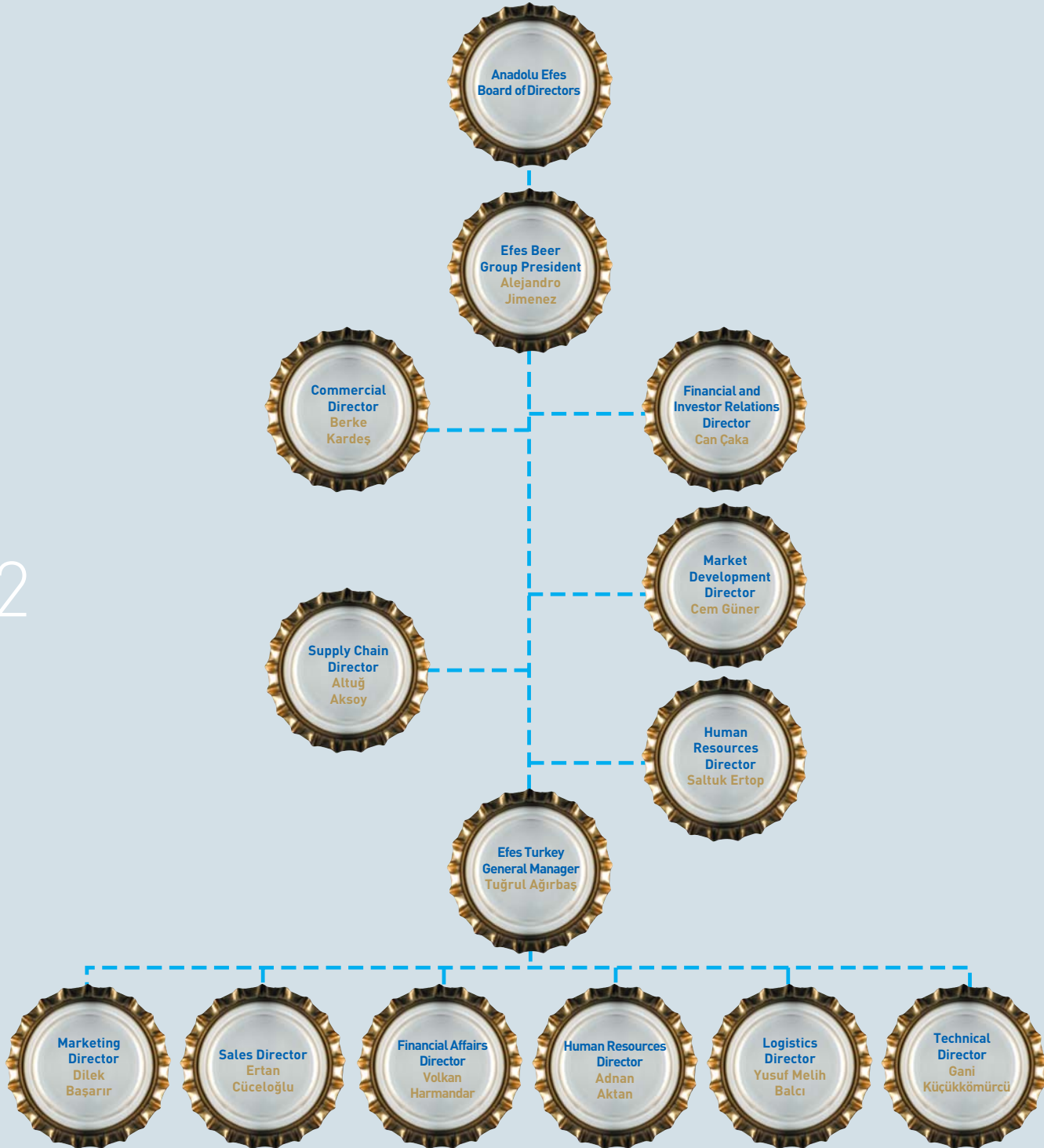
NOTE: Anadolu Efes subsidiaries, excluding brewing subsidiaries in Turkey, are stated on cost basis in order to provide more comprehensive presentation.

<sup>2</sup> You may reach most up-to-date and detailed information about financial realizations from the Shareholder and Investor Relations section of our website <http://tr.anadoluefes.com/>



# About Anadolu Efes

## Organizational Structure<sup>3</sup>



<sup>3</sup> Organizational structure as of 01.01.2010.





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# 4 Sustainability of Our Business



# Sustainability of Our Business

## GOVERNANCE

At Anadolu Efes, governance means that the top-level management, assigned with and responsible for the strategic management and direction of our company, carries out their duties and responsibilities while observing our stakeholders who affect our company or who are affected by our activities. The main aim of governance is the monitoring and checking by top-level management of whether or not our activities are carried out in accordance with the benefits and goals of our stakeholders, whether or not the prepared strategies match this mission, and whether or not practices are applied in the correct direction. As with all our activities, absolute harmony with laws and regulations lies at the basis of our governance activities.

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## CORPORATE GOVERNANCE

Our corporate governance principles incorporate the fundamentals that should be followed in the activities and decisions of our company's top-level management. These internationally accepted principles are: fairness, transparency, responsibility and accountability in all decisions taken and all activities carried out by the company's top management.

### OUR CORPORATE GOVERNANCE PRINCIPLES

**The Fairness (Equality) Principle:** Our company behaves in an equal manner towards shareholders and stakeholders in all activities.

**The Transparency (Openness) Principle:** To determine that our company is fair in all its decisions, all its decisions and activities must be transparent, and all decisions taken and all activities must be announced to the public in a timely, accurate and complete fashion, while everybody with an interest in our company should be able to access all this information with ease.

**The Accountability Principle:** The accountability principle means the accountability of our company's board of directors, not only to share owners but to all parties with an interest in our company.

**The Responsibility Principle:** The members of the board of directors and top-level management act appropriate to legislation, fundamental contracts and in-house regulations, with the awareness that they are responsible for all the decisions they take and all their activities. For this reason, the sharing of duties and responsibilities within the organization is clear and open, and known by everybody. One condition of the careful application of the responsibility principle is participation

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“ An Accountability Rating survey was carried out in Turkey for the first time in the year 2007, by the British think-tank **AccountAbility** and **csrnetwork** together with national partners, evaluating the ethical and social accountability of companies. In a survey carried out in Fortune100Global since 2004, and in Russia, South America, Hungary and Greece since 2006, large companies (in terms of sales) are evaluated in terms of their performance in fulfilling their social, economic and environmental responsibilities, and revealing these practices to their stakeholders in a transparent manner. In this survey, evaluating Turkey's 50 largest companies, **Anadolu Efes was awarded 5th place among the top 15 companies in the year 2008.** ”



# Sustainability of Our Business

## GOVERNANCE



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### DEFINING STRATEGY AT ANADOLU EFES

We carry out stakeholder interviews during the formulation of all our work strategies and whenever we enter a new country. In doing so, we have two goals:

1. To be aware of our responsibilities,
2. Paying attention to the identities and expectations of our stakeholders, as well as legislation and the environment when we formulate our strategies.

We identify key stakeholders for each geographical region. We observe the sustainability performance of all beer and drinks companies worldwide, as well as our continuous environmental impact analysis. Presentations to the board of directors include social and environmental effect analyses. We preserve unchanged the corporate responsibility budgets of the companies that we purchase.



## STAKEHOLDER ENGAGEMENT

At the core of our governance principle is our desire to listen to and understand our stakeholders, and take their requests and suggestions into account. At Anadolu Efes we consider anybody who directly or indirectly affects our activities, or is affected by our activities, to be our stakeholders. Our most fundamental goal is to establish honest, two-way and continuous communications with all our stakeholders. At the basis of our stakeholder engagement practice lies first-hand reporting, expressing ourselves in the most accurate way, and giving stakeholders the opportunity to express themselves.

“The basis for our ability to have done ‘a good job’ for 40 years is the effective communication we have established with our stakeholders.”

Stakeholder Group	Dialogue Method	Dialogue Goal
<b>Our Consumers</b>		
Efes consumers	Consumer satisfaction surveys	Understanding consumer behavior
Rival brand consumers	New brand and product development research,	Understanding trends
Non-beer-drinkers	Market research (perception surveys), Corporate reputation survey Efes Hotline	Identifying needs and expectations Determining potential consumers Identifying corporate and brand perception in the eyes of existing and potential consumers
<b>Our Business Partners</b>		
Our suppliers	Dealer satisfaction surveys	Identifying factors to improve work processes
Our dealers /distributors	Corporate reputation survey, Internal communications publications,	Identifying effective human management strategies
Open outlets	Employee suggestion monitoring system, Efes Quality Circles,	Strengthening corporate communications
Large stores	Human resources request and improvement hotline	Identifying needs and expectations
Small shops		
Our employees		
Farmers	Employee satisfaction survey	
Unions	Internal customer satisfaction survey	
<b>Opinion leaders</b>		
Financial analysts	Corporate reputation research, Joint projects,	To strengthen corporate image and reputation
NGOs	Web site, Informative meetings,	To increase awareness of society and social stakeholders
Politicians and bureaucrats	Press releases, Announcements, Visits	To contribute to society and social stakeholders
Members of the press		
Academicians		
Artists and writers		
<b>Local Population</b>		
	Employee volunteering practices, Social investment projects	To strengthen corporate image and reputation - To increase awareness of society and social stakeholders - To contribute to society and social stakeholders

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# Sustainability of Our Business

## GOVERNANCE

### RISK MANAGEMENT



The risk management and internal control mechanisms within our company have been established and the main fundamentals are announced to the public via our annual activity report and website. The basis for our company's risk management rests on the defining of all the risks that our company faces or may encounter, the development of practices that aim to minimize the defined risks, and the monitoring of these practices.

The existing and potential risks of our company are basically classified as financial risks, operational risks, and natural risks. Financial risks are active-passive risks, credibility, capital-credit relationships, exchange rate risks and other risk factors which may directly affect the company's financial status. Operational risks are risk factors which could affect competitive advantage, within the scope of the application of modern technology at an optimum level, and defining and carrying out the investments that need to be made in this respect. Natural risks encompass risk factors which could negatively affect the company's performance such as fire and earthquake. The SAP system we use is an important technological tool, which allows for measurement and processing aimed at minimizing existing risks, thus supporting decision processes. With this application, results of operations are monitored on a real-time basis and human error is removed, while the effectiveness of the internal control system is increased. Furthermore, our internal communications system, which uses top-level technology, allows us to quickly deal with and solve any problems encountered.





**The operational running of our existing management system has been made even more effective by the internal application of the following systems: ISO9000 (Quality Control System Standard), ISO14001 (Environmental Control System Standard), OHSAS18001 (Employee Health and Work Safety Standard), Technical Safety and HACCP (Hazard Analysis and Critical Control Point).** These established systems are continuously kept dynamic with internal and external checks carried out every year.

Within the framework of a financial affairs function, the continuously occurring results are compared with the budget and reasons for deviations are investigated. A "Security-Risk Management System" has been put into effect for the monitoring of client risks. With this configuration, the product purchase limits of our clients have been defined, and our systems have attained a structure whereby products are blocked from delivery when there is a case of overreaching the defined limit. In the company's internal control system, authority and responsibilities have been defined in writing. Within this framework, there is a clear definition of the rules according to which tasks should be carried out in matters related to the own operating scope of directorships, and who is responsible. In the internal control system, activity goals and principles have been clearly defined. The existing and potential risks of the company have been defined and are under constant surveillance, and regular reports are given to the directors. Matters which are to be approved along the chain of authority are presented to directors with explanations in an electronic format, and are viewed, checked and approved by more than one director, within limits. Toward the investment expenditures included within the annual budget and business plans, our facilities allow for the most cutting-edge techniques to be implemented and use up-to-date technology from the worldwide brewery industry. All our facilities are insured against natural disasters which may occur, in order to minimize the risk, and investments are made in back-up systems so that in the event of any extraordinary occurrence, systems will not be affected and data loss will not occur. At the same time, environmental factors and extraordinary processes are instantaneously monitored and causes are sought, while precautions are constantly taken to minimize risk. Our company is subject to the internal controls applied throughout Anadolu Group in general.

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## OUR -BUSINESS ETHICS

At Anadolu Efes we believe that companies are built on ethics., Anadolu Group's understanding of corporate culture forms the fundamentals of our ethics concept. Anadolu Group aims to provide the best service to not only the people of the countries where it operates but to all people, as well as to provide the best product, and to convey its prestige to future generations. The basic values adopted along this road are transparency, trust-based work, loyalty, effective communication, and respect towards nature and the environment. Anadolu Group's "CODE OF CONDUCT, which form its ethical values, are announced to the public from its website. We require and expect every member of the Anadolu Group family, from the Board of Directors to the newest employee who started work today, to be sincerely committed to our work principles and to work accordingly.

It is the individual responsibility of all of us to act in accordance with these work principles and to Anadolu Group's policies, and to ensure that our other colleagues do so as well. If actions inappropriate to these work principles occur, or if there are question marks about this issue, the management of our company will take the necessary steps. Our directors accept and declare that they will ensure actions appropriate to not just the words but the spirit of these ethics, and will strive in all the company's activities to build a work culture appropriate to laws and the Anadolu Group business principles. Other policies, rules of behavior and guidelines published / to be published by the company are of a supplementary nature. Various notifications are made by our company to ensure that all our employees understand ethical rules and related practices. For example, we make a handbook available for our employees who do fieldwork, prepared by our legal directorate and aimed at helping them with potential problems they may encounter.



# Sustainability of Our Business

## EMPLOYEE RIGHTS

The rights we allow our employees, who are the building blocks of the Anadolu Efes family, form the foundation of our relationship, and are part of our corporate undertaking. At the basis of all these rights lies our unshakeable commitment to universal human rights.

### OUR UNDERSTANDING OF HUMAN RIGHTS

**In 2008 we made a significant achievement in the field of human rights, and were included on the list of "companies with human rights policies" published by the Business & Human Rights Resource Centre.** Working independently and not for profit, cooperating with Amnesty International and various academic institutions, the Business & Human Rights Resource Centre website identifies companies that have taken the step of forming an official company policy on the subject of human rights, and publishes the said policies of these companies. An increasing number of companies throughout the world are forming human rights policies within the scope of social responsibility initiatives, and declaring their intention to act in accordance with human rights in their operations. In this area, too, Anadolu Efes has given center stage to its broad vision and pioneering identity, and revealed its distinction by acting with foresight.

In accordance with article 32 of the Convention on the Rights of the Child, accepted by the United Nations General Assembly on 20 November 1989, our company does not employ child labor. Within the framework of the second article of the United Nations Declaration of Human Rights, employees are given equal rights regardless of their gender, race or religion. Anadolu Efes, while remaining within the limits of local laws and regulations of the countries it operates in, observes the rights of individuals to become union members, in accordance with article 23(4) of the United Nations Declaration of Human Rights, and the Freedom of Association and Protection of the Right to Organize Convention adopted by the United Nations on 9 July 1948, articles 2, 3 and 4. There is not forced labor in any sense in our company.

All our processes and documents are based on universal human rights values. In this matter, absolute adherence to the most basic reference point, namely laws and regulations, is essential. Within the scope of our responsibilities to our employees, top priority among our institution's duties and responsibilities is respecting the rights given to our employees by laws and regulations, and protecting these rights.

We regulate the rights we give to our employees within the scope of our human resources policy. The human resources strategy of all companies within our group of companies is prepared in accordance with our vision and mission, implemented with the purpose of supporting our strategic business plans, and maintained under basic policies. Our human resources strategy and main topics are published on our website for the purpose of public knowledge.

We acquired the ISO 9001:2000 certificate exclusively for our human resource management activities, which is held by the very few companies in Turkey and the rest of the world, together with our affiliate Anadolu Industry Holding Human Resources Management. We have successfully maintained our ISO-certified quality management system since the year 2002.

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## OUR HUMAN RESOURCES POLICIES

**Centralized Strategies:** Local policies: We carry out our human resources strategies centrally, based on “thinking globally, acting locally” principles. On the other hand, we give importance to cultural difference, bearing in mind the social, economic and legal status of the countries where we operate.

**The Right Person for the Right Job:** Our goal is to follow a consistent employment policy, in accordance with the values we extract from job descriptions and evaluations. For this reason, we build human resources with the training and experience that will ensure carrying out the tasks required for the job in the best way.

**Preserving Our Dynamic Structure:** We revise our human resources system in a way that is in harmony with changing and developing market conditions. We develop our employees' experience and skills by providing the necessary training. This is how we preserve our dynamic structure.

**Our Competitive Advantage:** We create a competitive advantage with our results-oriented human resources, with their strong interpersonal relations, sufficient skills and sensitive attitude to the environment.

**Constant Flow of Information:** We use the latest technology to ensure a constant flow of information to our employees.

**Career Planning:** As a result of the systematic functioning of the performance management system, we collect a data pool on staff members who are planned for top-level management in the future.

**Training:** We plan our training activities, which we believe to be a constant requirement of work life, according to the needs and skills of our workers, and using the latest technology.

**Performance System:** We evaluate the performance and progress of our employees with constantly-monitored critical performance criteria, open interviews and mutual understanding.



**Our human resources mission** is to contribute to the development and growth of our human resources parallel to the vision, mission and strategies of our company, and, in accordance with these goals, to develop human resources strategies and coordinate their application to the human resources systems of all operations.

**Our human resources strategy** is to form a human workforce that is focused on company goals, that works as a team with knowledge, that constantly develops, that is happy, highly-motivated and well-trained.

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EFES BEER GROUP TURKEY REGION DIRECTORATE EMPLOYEE TABLE

Employee Type	Employee Sub-Group	Headquartes (Kartal)	Adana	Ankara (Ankara& Karadeniz)	Izmir (Izmir, Güney Ege&Akdeniz)	Istanbul (Istanbul& D.Marmara)	Lüleburgaz	Afyonkarahisar	Çumra	Tarbes	General Total
Normal	Permenant White-Collar	132	118	142	186	248	80	22	24	8	960
	Temporary White-Collar		6	10	8	12	3				39
	Permenant Blue-Collar	4	121	157	170	162	88	32	24	7	765
	Temporary Blue-Collar		10		11	2	1				24
<b>Normal Total</b>		<b>136</b>	<b>255</b>	<b>309</b>	<b>375</b>	<b>424</b>	<b>172</b>	<b>54</b>	<b>48</b>	<b>15</b>	<b>1.788</b>
Retired	Permenant White-Collar				1		1				2
	Permenant Blue-Collar				1						1
<b>Retired Total</b>					<b>2</b>		<b>1</b>				<b>3</b>
<b>General Total</b>		<b>136</b>	<b>255</b>	<b>309</b>	<b>377</b>	<b>424</b>	<b>173</b>	<b>54</b>	<b>48</b>	<b>15</b>	<b>1.791</b>



# Sustainability of Our Business

## EMPLOYEE RIGHTS

### EMPLOYEE RIGHT TO ADVANCEMENT

The most important driving force behind Anadolu Efes' current status, as a large organization spread over 14 countries, with an extremely successful 40-year past, is its seasoned human resources. Aiming to prepare our employees for tomorrow, we give great importance to their advancement at every stage and at every level, present this importance transparently with established systems, and "investing in people", because Anadolu Efes is an organization which has adopted the principle of picking the top-level managers of the future from among its employees. Within the framework of our concept of investing in people, we evaluate the advancement of employees under three main headings: career planning, training and employee volunteering.



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#### Career Planning

We use a Career Planning System in order to prepare our employees for the future, and to contribute to the raising of their potential to its highest level. Our priority goal with this system is to ensure the sustainability of Efes' competitive advantage. At the Evaluation Center, which is one of our practices, we use many different applications on employees with qualities which make them potential candidates for top level management positions, to identify the strong points and the ones needing further development; then we prepare a comprehensive advancement plan for candidates in accordance with the points identified..

#### Rotation Within the Company/ Group

Aware that sustaining our competitive advantage is enabled by investing in people, we subject our employees to rotation, aiming to provide them with experience in different positions. The aim of our rotation policy is to ensure that when our employees take on top-level management duties, they will have full knowledge and experience relating to the entire organization.



### Performance Management

In the Performance Management System, one of the systems we use to monitor company performance is the Critical Performance Indicators. In this system, the focus is not on the company's operational performance alone, but equal importance is given to profitability. At a unit level the process is monitored through established critical performance indicators, in order to measure the relevant performance of a department's area of expertise. Thus, whether at company level or function level, we monitor the indicators which make the greatest contribution to the company's ultimate performance.

Within the scope of these criteria, we allow a quantifiable evaluation of our employees with performance goals which are set for them annually, beyond the quality-based evaluation of our management policy. Within the framework of our vision, mission and strategies, we monitor the performance of our employees, identify their advancement areas, and ensure that they rise to a higher level in these areas. At employee level, the performance management system is a process carried out not only with an understanding based on the performance shown by employees in the past, but by identifying desired actions using the past as a reference but aiming for a goal shared by all parties. The system has been designed with an understanding of adopting the principle of continuous advancement. While the system's required performance evaluation interviews are carried out once a year, evaluation and the process of revising goals is actually spread out over the entire year, due to open communications with a junior employee's superior.

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# Sustainability of Our Business

## EMPLOYEE RIGHTS

### Training

The goal of training programs is to increase the productivity of the organization parallel to an advancement in our employees' performance. This in turn, is only possible through increasing the knowledge, skills and self-confidence of our employees. Training is an investment, and it's for change.

The criteria we give importance to in relation to training are: that they serve the achievement of vision, mission strategies and goals, that they are parallel to our corporate cultural values, that they are appropriate to our employees' career plans and can be shared, and that they contribute to our employees' motivation.

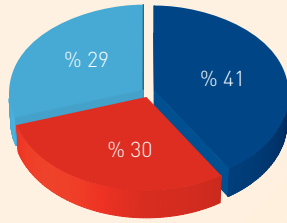
#### The Types of Training That We Carry Out At Our Company Are As Follows

- 1. General Training;** training aimed at personal advancement and management skills.
- 2. Orientation Training;** this is given to employees who have recently joined the Anadolu Efes family, via our e-learning platform, Efes Academy, and aims to introduce them to the culture of the group which they are a part of, to ensure their assimilation into the company and job, and to give them the basic knowledge they need to do their job. As well as orientation training for our newly recruited employees, we provide Work Health and Safety Training, Emergency Situation and Crisis Management training sessions to inform our employees about the requirements of our quality standards and legal regulations. When employees initially start work, we give them a booklet of Anadolu Group Code of conduct, which states the basic principles that all Anadolu Group employees must adhere to. In the event that there is any kind of change in the law or regulations pertaining to employee rights, we notify them of these changes by providing our employees with informative training sessions.
- 3. Professional Training;** on-the-job training, technical training and overseas training.
  - On-The-Job Training;** training largely based on the conveying of experience, given by the manager of an employee who has just started a new job or who has been transferred to a new position, or a member of staff with more experience about the requirements of that position.
  - Technical Training;** training aimed at the employee's acquisition and development of the professional capabilities required by their job.
  - Overseas Training;** short and long-term training given at overseas universities, brewery institutes and other educational institutions.
  - Training Arising from Standards and Legislation;** training carried out at the start of a new job and periodically, aimed at informing the employee about quality standards, regulations and requirements

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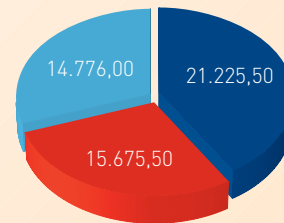


Training Type



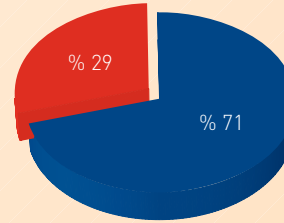
■ Occupational Training  
■ General Training  
■ Required by Standards and Regulations

Training Type Distribution on Man-hour



■ Occupational Training  
■ General Training  
■ Required by Standards and Regulations

Man-hour Distribution



■ Blue-Collar  
■ White-Collar

#### Some of Our Training Sessions Are AsFollows:

- ISO 9000:2000 Quality Training
- OHSAS 18001 Quality Training
- Working at a Height Quality Training
- Hygiene Risks and Control Quality Training
- Working with Pressurized Containers Quality Training
- Working in Confined Spaces Quality Training
- Ergonomics and Office Work Hazards Quality Training
- Emergency and Crisis Management Quality Training
- ISO 14000 Environmental Management System Quality Training
- Orientation Training
- Business Ethics Training

In the year 2008, the number of training hours received by white-collar workers was 38, and the number of training hours received by blue-collar workers was 18.

### Employee Volunteering

For the sake of contributing to the economic, cultural and social progress of the region in which it operates, Anadolu Efes has adopted the principle of taking part in every kind of activity that is appropriate to the corporate cultural values. As part of the activities we carry out together with the Private Sector Volunteers Society within this framework, our employees carried out a book-reading project, involving their support of primary schools located near our grounds, encouraging the pupils there to read books, and to ensure that the pupils were in an environment shared with people who would be a good role model for them for their future. We use our qualified work force for the benefit of the community.



# Sustainability of Our Business

## EMPLOYEE RIGHTS

### SOCIAL RIGHTS

#### Remuneration

The goal of the Anadolu Efes Remuneration System is to build entire systems that secure a qualified work force and keep them within the company, increase the motivation and performance of employees, and thereby help ensure the competitive advantage of the company in markets where it is currently located and will be located in the future. Towards this mission, the pay strategy in all our operations at Anadolu Efes is;

- To fix pay with the focus on the magnitude of the job and the employee's performance,
- By monitoring practices in the industry, to maintain pay practices at a competitive level and improve them
- To apply the pay system to all employees in a fair fashion
- To initiate cost effective pay practices and thereby help increase the productivity of the company.

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## Fringe Benefits

As well as pay and bonuses, we have marriage, birth, death and child pay, education support, food support and a comprehensive social aid package; our company also provides employees with transportation and meals. Depending on their position and duty, we furnish our employees with vehicles and mobile communications devices. There is also the benefit of Life Insurance and a Private Health Insurance, which also covers the spouses of our employee. In addition to the fringe benefits provided within our company, we initiated the **Individual Retirement System (IRS)** as of May 2007. On the condition that employees wishing to participate in the IRS scheme pay premiums of at least 2% of their gross monthly salaries, the company also contributes 2% for the employee. Thus the minimum premium amount paid by the employee for their individual retirement insurance is doubled by Anadolu Efes' contribution.

Within the concept of social benefits, we include activities which raise the staff's motivation levels to the maximum. In addition to this, all of our factories are exceptional in terms of the exercise opportunities they offer, and with the tennis courts, basketball courts, football fields and volleyball courts at our factories, we provide our employees with the opportunity to play sports. We do not discriminate in any way towards employees in terms of social benefits, even if they are working part-time. As well as all these, all employees are aware of our existing procedures that aim to contribute to our employees financially or in terms of education.

## The Work Life Balance

At the core of our employees' ability to work happily and productively lies their inner peace. At Anadolu Efes we give as much importance to spiritual values as we do to material values, and consider loyalty to be a fundamental of our corporate culture. We consider it an important aspect of our corporate understanding to be at each other's side and support each other whenever necessary. The happiness of our employees outside work is invaluable to us. For this reason, we do our best to help our employees balance their work life and private life with standard practices such as marriage leave, birth leave (maternity/ paternity leave) and overtime pay. When they travel privately, we make sure that our employees benefit from the Efes Tur company, which belongs to the Anadolu Group. When they retire from our company, and at their own request, we give our employees, who benefit from Private Health Insurance as befits their position and duties, the chance to continue with their health insurance scheme, remaining subject to the same coverage requirements as our current employees.

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# Sustainability of Our Business

## EMPLOYEE RIGHTS

### THE RIGHT TO COMMUNICATION

Ensuring open, two-way, clear communication among our employees at every level is one of our fundamental goals. We know that information, the most valuable resource today, is the most important element in healthy decision-making, and we build systems for the sharing of our information. Employees' maximum participation in management is essential, and, as an institution, we try to use every means to enable this.

**We wish for our employees to be proactive in their work life, and to solve the problems in their own area of responsibility using their initiative. In this respect, using the Work Development Suggestions and Project Monitoring Application databases built within the Suggestion Monitoring System we have developed, we allow our employees to share with management any suggestions that may benefit our institution.**

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As an example of our employees' creativeness in decision making, using an electronic bottle counter designed by one of our employees, foreign bottles and ones not suitable for filling automatically, which were previously counted and sorted visually at filling plants, could now be counted automatically and the amount of waste could be accurately determined. By implementing this suggestion, our company was given the opportunity to save a considerable amount of money. At the suggestion of another employee, using liquid caramel instead of dark malt in the production of wort revealed the existence of an opportunity for significant added value. The suggestion of another employee to form a competition-style channel using our Efes Academy e-learning platform, whereby questions on professional matters directed at our employees would not only provide them with entertainment but also develop their skills, inspired us to use our existing tools in an even more effective way.

**In addition to this, with our Efes Quality Circles project, where our employees take on and solve the problems related to tasks within their own field of work, we aim to provide our company employees with an environment of better communication, creativity and innovation, to increase the motivation of our employees, and to enable the personal advancement of our employees.** We consider the festivals, which take place at all our locations as part of the Efes Quality Circles process, an important opportunity to once again underline the spirit of mutual support, which is one of our corporate cultural values.

As well as the various channels designed for employee contributions to management, we have a Human Resources Request and Improvement Line which is provided for the benefit of our employees by Human Resources, whereby our employees are able to communicate their requests and improvement demands in relation to services. Our employees use this line in an effective and free manner.



At Anadolu Efes we use many different instruments for the purpose of raising our employees' contributions to management to a higher level. Applied for the first time at the Istanbul Brewery in 1996, the Employee Satisfaction Survey has been carried out to include all our employees. With the contribution of this survey as well, which is carried out regularly every year with the results monitored, our company and employees have benefited significantly over time.

We are currently implementing the second Corporate Reputation Survey, the first of which was completed in the year 2005, together with an independent research company and the participation of all our social stakeholders.

With our Internal Customer Satisfaction Survey, which we have been implementing since the year 2002, we aim to create the necessary environment of communication and coordination between all departments within our structure, and measure the satisfaction level relating to services provided by the departments to each other and thus improve them.

With our employee-oriented events which have become a tradition at Anadolu Efes, the message that we give to our employees, who operate over a very broad area, is that they are each a very important character contributing to the value we have created; we also raise the synergy between our employees to a higher level. In particular, we think that events of this kind are a crucial opportunity for employees working at different management levels to get to know each other and to develop their communications.

As a result of a broad-ranging corporate communications survey that we carried out in the past, we measured the level and culture of lateral and vertical communications within the company, and within this framework we re-structured the communications devices that we use.

In our quarterly magazine, which we have named Biravo and make it available to our stakeholders at all our operational centers, we announce important news relating to our company and use it as a significant internal communications tool.

### Minimum Warning Period

In the event that one of our employees is appointed to another job due to operational changes, procedures are followed according to not only the essentials defined in the Labor Law, but also our company's Transfer Procedure. If an employee's contract is terminated due to operational change, procedures follow the Labor Law and Labor Agreement provisions. There are certain arrangements in favor of the worker in some of the provisions of the Labor Agreement beyond the Labor Law.

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# Sustainability of Our Business

## EMPLOYEE RIGHTS

### THE RIGHT TO ORGANIZE

We believe that social and economic advancement is enabled in a healthy work environment where work peace is secured. We strive to make work peace constant, and try to be an exemplary company in terms of employee and employer relations. To this aim, Anadolu Efes considers unions to be stakeholders; it evaluates union representation and collective bargaining as opportunities for the identification and development of methods that contribute to the sustainability of peace in the working environment. In this respect, so long as laws and regulations are not flouted, Anadolu Efes observes the right of individuals to be union members, in accordance with Clause 23(4) of the United Nations Declaration of Human Rights, and with the 2nd, 3rd and 4th clauses of The Freedom of Association and Protection of the Right to Organize Convention, adopted by the United Nations on 9 July 1948.

Within this scope, as stated in the Labor Agreement, there is a "Workplace Union Representative." The duties and responsibilities of the representatives are to ensure peace at work, to maintain and to observe the harmony between employees and employers. To this aim, they carry out the tasks stated below:

- a) Ensuring cooperation and working peace between the employee and employer in the workplace,
- b) Examining the demands and complaints made by the workers and convincing the workers when the demands and complaints are unreasonable, while conveying the demands and complaints to the employer when (s)he himself/ herself judges them reasonable. (The representative may not be punished for using their right to judgment with these complaints).
- c) To strive for the friendly solution of disputes which arise between employees and employer.
- d) To find solutions for any snags which may arise in matters relating to the provisions of this agreement, and when necessary to take the matter to the employer after consulting the workers,
- e) To try to prevent enterprises and actions in violation of the law, and to avoid taking part in enterprises and actions of this kind,
- f) To organize relations between union workers and the union,
- g) To try to maintain the trouble-free implementation of the agreement
- h) In the event of any matters which could not be resolved in the workplace, to convey them to the branch they are associated with.
- i) To carry out other responsibilities given by legislation.

**As an institution, we encourage our employees to be union members, and, with the exception of pay, all the rights defined in the collective bargaining, which is re-evaluated every two years, are granted to all our employees, not only the employees who are union members. The union member ratio of our blue worker employees, who make up 44% of our total employees, is about 95%. As of 31.03.2009, the number of union member employees working at Anadolu Efes is 748.**



## EQUAL OPPORTUNITY RIGHTS

One of our responsibilities to the company's employees, which is also one of our group's work principles, and is applied without compromise, is the absolute non-discrimination in every kind of relationship with our employees, in terms of race, age, nationality, gender, physical handicap and personal belief. We are proud of the differences and cultural diversity of our employees and we see this variety as a vehicle for advancement when united for a mutual goal.

We provide equal opportunities to our employees in all our human resources practices, including initial employment to training, pay, career and the financial benefits we grant. We did not receive any complaint from our employees about discrimination in particular during this reporting period.

As an institution that has adopted the principle of "equal pay for equal work", there is no discrimination of any kind in matters of pay or any other human resources practice, be it discrimination related to language, race, gender, politics, philosophy, religion, sect or similar kinds of discrimination.

### Hiring

We carry out the hiring process with an attitude of respect and dutiful vigilance towards the legal and legislative rights of our candidates. As a reflection of this attitude, we make no discrimination in any way in terms of race, color, age, nationality, gender and belief during our relations with the candidates. One of the greatest advantages we have gained from being a multi-national company and operating across a very broad area in Turkey is the chance to work with people who come from different socio-cultural environments.

We subject the candidates to an objective evaluation process, based on the general skills specified for Anadolu Group companies as well as on skills specific to the position. Essential to this process is establishing whether or not the person has the potential that would enable the development of the expected skills, and at what level he/ she shares our corporate cultural values of cooperation, entrepreneurship, excellence and modernity.

Through the [www.anadolukariyerim.com](http://www.anadolukariyerim.com) website, which was designed toward the corporate hiring process for Anadolu Group companies, candidates can access all the group's companies. We also use other well-known application management sites in order to reach a qualified workforce. Furthermore, we may choose newspaper ads to reach candidates when necessary.

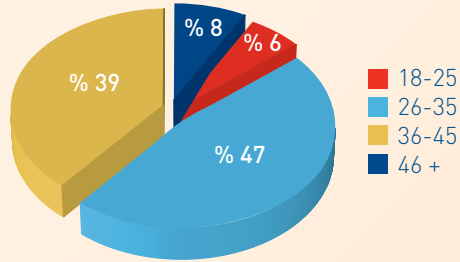
EFES BEER GROUP TURKEY REGION DIRECTORATE TABLE OF EMPLOYEES WHO ARE DISABLED - EX-OFFENDERS - VICTIMS OF TERROR AS OF 31.03.2009											
Employee Type	Employee Sub-group	Headquarters (Kartal)	Adana	Ankara	İzmir	İstanbul	Lüleburgaz	Afyonkarahisar	Çumra	Tarbes	General Total
Normal	Permenant White-Collar	1	3	1		5					10
	Permenant Blue-Collar	3	13	11	18	19	9	3			76
<b>Normal Total</b>		<b>4</b>	<b>16</b>	<b>12</b>	<b>18</b>	<b>24</b>	<b>9</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>86</b>
Retired	Permenant White-Collar							1			1
	Permenant Blue-Collar				1						1
<b>Retired Total</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>
<b>General Total</b>		<b>4</b>	<b>16</b>	<b>12</b>	<b>19</b>	<b>24</b>	<b>10</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>88</b>



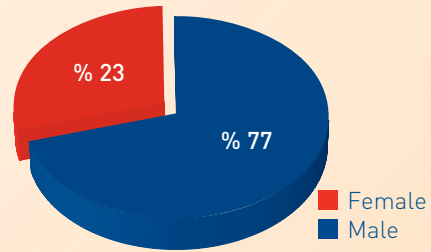
# Sustainability of Our Business

## EMPLOYEE RIGHTS

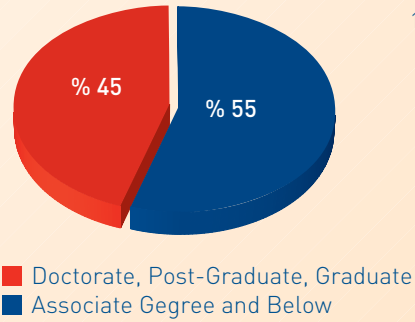
Employee Distribution According to Age Groups



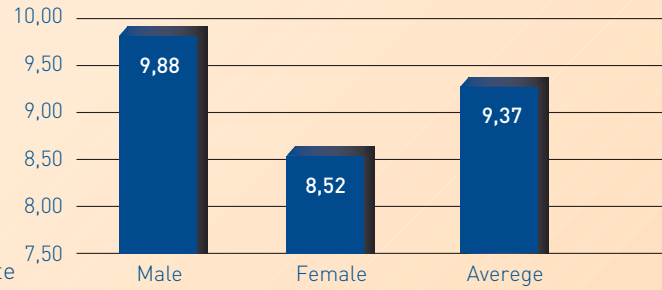
White-Collar Employee Distribution According to Gender



Employee Distribution According to Educational Level

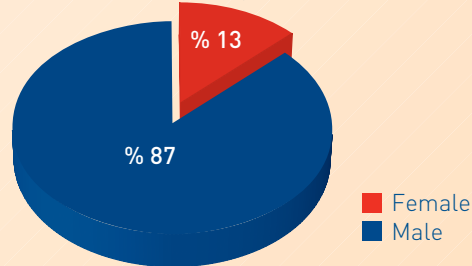


Average Seniority

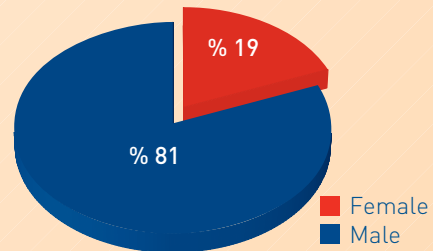


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Top Management Employee Distribution According to Gender



Employee Distribution According to Gender



### TURNOVER RATE REGIONAL DETAIL (2008)

Adana	% 3,98
Afyonkarahisar	% 3,51
Ankara	% 6,15
Çumra	% 7,55
İstanbul	% 7,29
İzmir	% 4,32
Lüleburgaz	% 1,78
Headquarters (Kartal)	% 4,79
Tarbes	% 6,25
<b>TBB</b>	<b>% 5,19</b>

“ The workforce turnover rate for Anadolu Efes in 2008 was %5.19. ”



## THE RIGHT TO HEALTH AND SAFETY AT WORK

It is part of Anadolu Efes' way of working to reduce the hazards and environmental effects that could be caused by all operational processes in terms of occupational health and safety, or to implement the planning necessary for keeping them under control. At Anadolu Efes' existing facilities, we make investments to reduce work safety hazards and environmental effects at whichever points possible. Operational safety and environmental effects are taken into serious consideration with newly acquired machines, and we choose the technology that offers the least hazards. When selecting materials like cleaning chemicals and water chemicals, we choose the ones that pose no threat to work safety and the environment.

With the purpose of improving the efficiency of their regular operations related to occupational health and safety and the environment, Anadolu Efes has established the OHSAS 18001 Occupational Health and Safety System and ISO 14001 Environmental Management System. At the end of the documentation process in April 2004, we received the ISO 14001 and OHSAS 18001 certificates for 5 breweries, 2 malt and 1 hops production facilities as well as for the company's central office. During the installation of the systems, we carried out work safety risk evaluations and environmental effect evaluations for all operations. We share the accumulation of knowledge and experience that we acquire domestically (ISO 9001, 14001, OHSAS 18001 and beer quality standards) with our international operations as well, to ensure mutual advancement. We have carried out important activities over the past few years in order to provide our employees with a secure work environment. We have initiated many important practices defined in the Occupational Health and Safety Procedures, prepared using the OHSAS 18001 standard as reference. Thus:

- Extremely comprehensive hazard evaluations have been carried out with regards to equipment, operations and materials used; areas in need of improvement were identified as a result of these evaluations. While activities that could be carried out with simple arrangements were immediately initiated, procedures necessitating investment were transferred to Action Plans.
- We introduced the concept of "technical safety". We conduct regular checks on equipment that poses an explosion hazard, like pressurized containers, or on lifting equipment that could cause injury among employees when safety conditions are insufficient. We either improve or replace equipment when it is found to be sub-standard or problematic.
- We have established systems aimed at preventing emergencies (protective systems, alarm systems and so on).
- We have prepared a Working Safety Guide, which defines work safety rules that should be followed in all operations. Where necessary, we added work safety-related points to instructions.

Another important step taken with regards to work safety is having noise, thermal comfort and emission (internal environment air quality) levels measured in the work place. We have made significant investments at our facilities in places deemed necessary according to the results of these measurements, and arranged for the use of protective materials. We have done research to find protective materials of the most appropriate quality, involved the participation of our employees in the selection of protective materials, and have chosen certified, ergonomic products that abide by international standards. We have subjected all our employees to training sessions on the importance of the use of protective materials.

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# Sustainability of Our Business

## EMPLOYEE RIGHTS

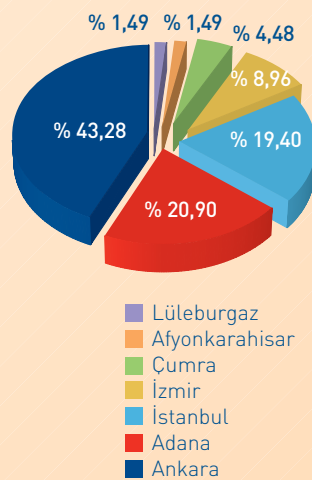
At Anadolu Efes we consider training to be one of the most important elements of efforts related to occupational health and safety. Towards this aim, we provide comprehensive training for all our employees, interns and subcontractors, covering general occupational health and safety rules as well as the special precautions that should be taken against the hazards of the jobs they undertake. **Due to the standards and regulations we have evaluated within the scope of this type of training, we subjected our employees to 21,225.5 hours/person of training in 2008.**

Bearing in mind the layout of facilities and the activities that are performed, we have defined emergencies as fire, earthquake, sabotage, aerial attack, chemical spillage and leakage, hazardous and poisonous gas leakage, explosion, discharge of waste water, occupational accidents and radioactive accidents. In order to be prepared for this kind of emergency in advance, we have established an Emergency Management System, within the framework of the ISO 14001 Environmental Management System Standard and the OHSAS 18001 Occupational Health and Safety Management System System. We have defined responsibilities, authority and work flow for procedures to be carried out in the event of an emergency. We encountered needs required by an Emergency Plan, such as emergency lighting and escape signs, meeting areas, visual documents and an emergency center. We established protective systems aimed at preventing the occurrence of emergencies, such as fire detectors, gas leakage warning systems, chemical overflow pools, etc. With the emergency drills that we carry out every six months using pre-prepared scenarios, we ensure both the freshness of the system and the education of Anadolu Efes employees on the subject of occupational health and safety.

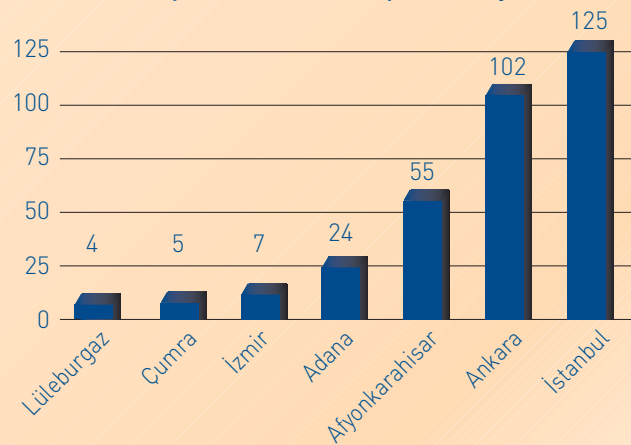
During the reporting period, no safety problem occurred involving our employees and their families in any field of work, during business trips, in social areas or other areas. During the reporting period there was no case of injury or death caused by safety issues.

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Proportion of Occupational Injuries in 2008 by Region



Number of Days Lost Due To Occupational Injuries in 2008









EFES

# Sustainability of Our Business

## RESPONSIBLE MARKETING

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Responsible consumption is a matter we focus on with great care, and comply in full with regulations on the matter. We are aware of the importance of scrupulously carrying out all our due responsibilities in responsible consumption and related communications processes. In the marketing communications process at Anadolu Efes we maintain complete accordance with regulations established by the Tobacco and Alcohol Market Regulatory Agency (TAPDK) on matters of compliance with legislation and competition policy. We comply with the advertising regulations imposed by TAPDK by carrying out the marketing communications of our products in areas and using media that have not been banned.



## Responsible Advertisements

In the advertisements that we prepare for all the products in our portfolio;

- We do not select youth and children as a target audience; we do not use young people or children in our advertisements, or people who give or are given this kind of image despite being neither youth nor child. We do not run our advertisements using channels that target children.
- We do not use content relating to the association of our products with driving.
- We do not use content claiming that our product has remedial properties or stimulating, relaxing, or fortifying effects, or the effect of providing superiority.
- We do not handle themes that suggest that our products may solve personal problems or have medically protective effects.
- We do not portray abstinence as a weakness.
- We show the alcoholic content of our products accurately and in a way that will not mislead the consumer; we do not give a message that would create any association between the product's quality and effect and its alcoholic content.
- We do not give the message that drinking alcohol is a status symbol.
- We do not allow advertisements that portray abstinence from alcohol as a mental and social deficiency.
- We do not emphasize that consuming our products increases sportive achievements.
- We do not allow statements or images that contain sexual exploitation or pornography.
- We use accurate, clear and comprehensible language, and do not use ambiguous statements or misleading meanings of words.

We remove all compliance problems from the advertisements that are used or to be used, in terms of possible conflict with laws and regulations in product communications processes by consulting to our legal department. There is no possibility of any product communications that are against legal requirements. In this respect we show particular sensitivity regarding the matter of "not advertising to persons below the age of 18" in product planning.

The values of our location's geography are very important to us as well. Acting in accordance with these values is another important aspect of responsible marketing. With this understanding, we have no media visibility during the month of Ramadan and religious festivals. As our competition policy carries the concept of "focus on growth of the beer market", we also support our rival's policies relating to the development of new brands.

In addition to the abovementioned points, we completely refrain from using any loopholes that may occur in regulations and laws. In this way, the process and application of responsible marketing remains intact. Within the scope of the reporting period, there is no litigation relating to Anadolu Efes having acted contrary to legislation in this matter.

In order to help ensure consumer awareness in the matter of alcohol use, we include the warning "drink responsibly" and an image of a road on all flyers, posters and advertisements, encouraging responsible consumption and promoting awareness regarding driving under the influence.

We also give great importance to informing the consumer in the case of labeling products. With labeling, the consumers are informed in a way appropriate to the Food Codex. As well as this, labels carry details about the "Efes Hotline". With this line, consumers can convey their suggestions and complaints as well as obtain information about the product. A special database system has been established within Anadolu Efes for the purpose of conveying incoming demands to the relevant Efes authority. Through periodic reports comprising feedback and data obtained from this system, direct communication between Anadolu Efes and consumers is enabled.



# Sustainability of Our Business

## RESPONSIBLE MARKETING

### ABOUT BEER



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The most general definition of beer is a nourishing and cooling drink, made by mashing the flour of germinating barley (malt) in water, flavoring the resulting wort with hops and then fermenting it. As can be understood from this definition, the raw materials used in modern-day beer production are barley, hops and water. When one considers the production methods employed and the ingredients, one might say that beer is an almost natural beverage.

It's not known for sure when beer was first produced, where and by whom. It is thought that it emerged from the Sumerians, the Babylonians and Ancient Egypt. Two opinions are dominant regarding the passage of beer into Europe. The general trend is that beer entered Spain and Europe via Mesopotamia, Egypt and North Africa. According to another view, beer passed from Africa and Spain to Greece and Rome and thus reached Germany.



1516 is an important year in terms of the history of beer. In 1516, with the Beer Purity Law passed in Germany, it was established that beer was produced from water, barley malt, wheat malt and hops, and the standard for beer was accepted. In the year 1602, Dr. Alexander Nowell proved that beer would last longer when stored in cork-sealed glass bottles.

The most crucial turning-point in the history of brewing occurs in the 18th and particularly 19th centuries. After the invention of the steam machine, the Whitebread Brewery in London was the first to produce an annual 200 thousand barrels of beer in 1796. Previously only produced in cool seasons, beer became constantly available with the advent of artificial refrigeration in the 19th century. Production and distribution techniques rapidly develop; beer is transported everywhere thanks to railroad transport and refrigerated wagons, and consumption increases at a similar rate.

The book entitled Studies on Fermentation, by the inventor of the pasteurization technique Louis Pasteur, is the start of scientific studies related to brewing and healthy production. After the Danish Hansen isolates a single yeast cell, fermentation techniques and consequently the taste of beer undergoes improvement.

One effect of this development is the emergence of different types of beer. While "ale" was a widespread type of beer in the 19th century, beer production starts in Munich in the 1830s with the "lager" technique, based on bottom-fermentation. Although the first lager beers are dark and reddish in color, like previous beers, in 1842 the first gold-colored lager is produced in the town of Pilsen in Bohemia. As beer had been drunk from ceramic, metal and wooden vessels prior to then, the color of beer had not previously attracted attention, but as it was now served in glass mugs, this new color became so popular that even today Pilsener beer is known primarily for its clarity and golden color.

As we can see, beer went through many stages before it reached the state of the beer we drink nowadays. It would not be too erroneous to say that beer changed history as well, with many events and discoveries that influenced the history of mankind.

“ Good beer is made from good malt, and good malt is made from good barley. The reasons for the use of barley malt in beer are as follows: barley is easily preserved, its hard hull is resistant to pests, the fact that its breakdown is harder compared with other naked grains, and the fact that the kernel of brewing barley is softer than that of other grains and more productive in malt production. Due to the chemical composition of barley, starch is more readily converted into sugars. ”



# Sustainability of Our Business

## RESPONSIBLE MARKETING

Barley harvested from the field is cleaned with the help of a series of machines, sorted according to grain size, and aired in tall silos until the time comes for it to be soaked in water for germination. When it reaches a certain germination level, the water is drained and it is kiln-baked. At this stage the barley is cleared of germination and becomes malt.

The malt obtained is then ground up, mixed with water and left to sit at a certain temperature. This process is called mashing, and this is how an intermediary product known as wort is produced.

After the wort, which is a mixture of solids and liquid, is filtered in a draining vessel and separated from its residue, it is taken to the boiling process. Boiling is the turning point of the brewing process, and it is at this stage that hops are added to give wort its characteristic bitterness and aromatic flavor.

What makes the hops plant so important in brewing is the lupulin it contains. Lupulin is composed of resin and oils; its bitterness and preservative properties come from the resin while the aroma is provided by the oils.

After boiling for one or two hours, the wort is taken to be cooled. In the production of Efes Pilsen, "sealed coolers" are used to prevent the wort coming into contact with air. When the wort reaches the desired level of coolness it is mixed with yeast and the fermentation process is initiated. There are two kinds of fermentation, known as top and bottom fermentation. Bottom fermentation is used in Efes Pilsen beer, and clumps of yeast are used for this process. Clumped yeast sinks to the bottom directly, quickly and thoroughly towards the end of the fermentation process. Its fermentation having been completed, fresh beer is left to condition in special tanks at a temperature of 0-2 degrees Celcius. The fermentation and conditioning stages are completed in 18-21 days.

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Different types of beer are produced from the top and bottom fermentation processes. You can find details of these different types in our website [www.efespilsen.com.tr](http://www.efespilsen.com.tr)

The next stage is the filtration process, and beer is filtered at least once for it to acquire the desired clarity. The filtered beer is then transferred to filling tanks, and bottles, cans and barrels are filled using a special filling system. The recyclable bottles are transferred to bottle-washing lines after they reach the factory. Finally the cleaning process is completed when they are rinsed with cold water.

Bottles that come out of the washing machine are put through a checking system to check automatically as to whether or not the bottles are dirty or damaged. Dirty bottles are sent back for re-washing, and damaged bottles are destroyed. Bottles that pass the check have their air vacuumed out, and are filled with beer under carbon dioxide pressure.

The filled bottles are pasteurized to extend their biological shelf life. The bottles, heated to 63 to 65 degrees by being sprayed with water as they pass through the pasteurization tunnel, are re-cooled in stages after being pasteurized.

After the pasteurization process the bottles are labeled. After labeling, the bottles are packed into crates and taken to the product warehouse. From here they are transported in trucks to dealers, depending on orders, to reach the consumer.

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# Sustainability of Our Business

## RESPONSIBLE MARKETING

### OUR PRODUCTS

Ever since our establishment, we have adopted the "consumer-based" approach in all our practices. Thanks to the great importance that we attach to research, we establish expectations for our products and reach our customers in a way that meets their expectations. Taking action with this understanding forms the foundation of our sustainability concept.

Our products, which we produce paying attention to consumer's pulse, reach our customers after passing through research, evaluation and decision stages. With this understanding, which we have maintained for many years, Anadolu Efes:

- Encourages the development of new brands in the beer market,
- Tries to establish a beer culture with local brands,
- Acts with the focus on the growth of the beer market, not just our own market,

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Despite the fact that advertising alcoholic drinks on radio and television has not been possible in Turkey for the past 25 years, Efes Pilsen owns the leading spot in Turkey with 100% brand awareness, and the highest share in Turkey's retail food and drink category in terms of consumer expenditure (AC Nielsen December 2008).







Anadolu Efes has a product portfolio which, as well as the brands under the “Efes” umbrella, namely Efes Pilsen, Efes Light, Efes Dark, Efes Dark Brown and Efes Xtra, includes Turkey’s first wheat beer, Gusta, and black wheat beer Gusta Dark, the agave and lemon-flavored Mariachi and Mariachi Black, as well as the Marmara Gold and Marmara Kirmizi brands. Anadolu Efes has also continued to expand this portfolio with the brands it produces under license, such as Miller Genuine Draft (MGD), Beck’s and Foster’s.

We are aware that the competitive advantage that we have achieved with these different brands is an important element in the beer selection of our consumers. With this understanding, we evaluate our brand portfolio, which covers the main beer segments, in the “premium”, “economical” and “popular” segments, and carry out our activities accordingly.

When creating our new flavored beers, it’s paramount for us to be able to appeal to the taste buds of our consumers. In order to achieve the perfect flavor with this understanding, we consult a great number of domestic and foreign stakeholders, and create our new beers with different flavors after a significant research and development process.

In order to be able to truly meet consumer needs, Anadolu Efes launched two new products on the Turkish market in 2008. Launched in February 2008, “Efes Dark Brown” is a beer with high alcoholic content, combining the flavors of beer and coffee. “Efes Dark Brown” is Turkey’s first coffee-flavored beer. Launched in April 2008, “Mariachi Black” is the high-alcohol version of the extremely popular agave and lemon-flavored “Mariachi” brand. When it was still only one year old, the “Mariachi” brand was awarded the gold medal in the “Aromatized Beer” category of the International Institute for Quality Monde Selection 2008 Quality Awards. Turkey’s first wheat beer Gusta was launched in the year 2008, while the black wheat beer Gusta Dark was introduced to consumers in the year 2009.

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To access detailed information about our products and their microsites, you can visit our website [www.efespilsen.com.tr](http://www.efespilsen.com.tr)





# Sustainability of Our Business

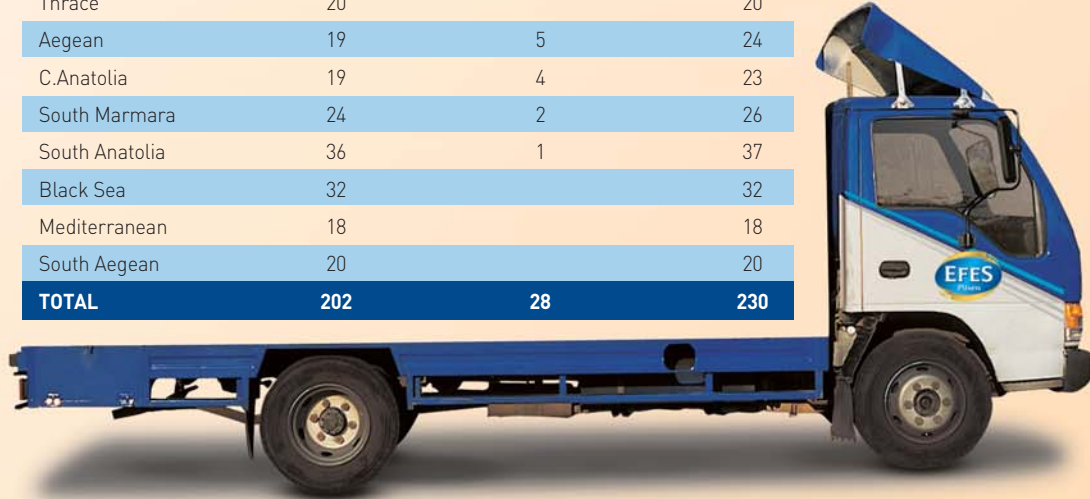
## RESPONSIBLE MARKETING

### SALES AND DISTRIBUTION

In terms of the accessibility of our products and the sustainability of our business, our dealers and distributors hold great importance. For this reason, our communications with our dealers and distributors are an indispensable aspect of our business.

Our dealer and distributor leaders are in constant contact with each other as well as with the relevant retailers throughout the entire day.

Headquartes	Dealers	Distributors	Total
İstanbul		12	12
E. Marmara	14	4	18
Thrace	20		20
Aegean	19	5	24
C.Anatolia	19	4	23
South Marmara	24	2	26
South Anatolia	36	1	37
Black Sea	32		32
Mediterranean	18		18
South Aegean	20		20
<b>TOTAL</b>	<b>202</b>	<b>28</b>	<b>230</b>



To ensure the productive continuation of our long-lasting business relations, "dealer satisfaction surveys" are carried out both by independent companies and within the company. The data that is obtained as a result of regular studies is an important source of information for Anadolu Efes, enabling the more efficient implementation of related processes in the future.



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In dealer and distributor structuring, there are employees managing outlets under the dealer leaders, and sales representatives working under distributor leaders. Due to this structuring, one can easily say that regular communication is maintained with outlets, and that, in addition to this, requirements are more easily established. Sales leaders visit existing dealers at periodic intervals; they provide information about ensuring product safety, safe storage conditions and similar topics. Sales training provided to dealers, teams and employees who support this practice is another noteworthy practice that Anadolu Efes gives great importance to, aimed at dealer competency and increased sales.

We carry out evaluations of the previous year with our dealers and distributors at meetings held every year, as well as sharing projections about the future, and swapping ideas for making related processes more efficient. Thanks to these meetings, we can produce more realistic and efficient goals for the future, and thereby jointly contribute to the sustainability of our business.

## LOGISTICS

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Logistics practices within the Anadolu Efes organization are divided into two: transportation between warehouses and dealer-distributor transportation. The fundamental reason for the conducting of our operations with subcontractors is the preference for doing business with professionals. The advantageous result of this is that Anadolu Efes:

- Monitors emissions monitoring more efficiently.
- Spreads compliance with environmental standards over a wider area.
- Carries out a sustainable operation.

Transportation of beer alone involves an average of 100 thousand transport vehicles. All domestic transportation is carried out by road, and we currently work with 6 different transportation companies (five of which being for the transportation of beer, one of which being for the transportation of barley and malt). The products that we export to European and African countries are usually shipped by sea transport.

The fundamental goal pursued in all these operations is transportation optimization. This optimization could also be qualified as reducing the number of trips made by the vehicles. Reducing the circulation of the product, both in terms of transportation between warehouses and dealer/ distributor transportation, is a basic goal. Together with this, the results obtained include reduction in emissions, and time and fuel economy.



# Sustainability of Our Business

## RESPONSIBLE MARKETING



A product of this perception, the “reduction in passenger vehicle fuel consumption” project is a project which emerged when employees from different departments within Anadolu Efes came together, formed a project and put the “Quality Circle” into practice. All these practices are indicative of how sensitive Anadolu Efes is towards the environment by reducing emissions, and how it operates with a more sustainable business concept by reducing costs.

As well as weight and route optimization for the vehicles used within the warehouses,

there is constant work carried out for the sustainability of improvements in the areas of emission, time and fuel.

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In the course of our operations, one of the factors we most value is occupational health and safety. Aiming to maintain occupation health and safety at the highest possible level, 12 kg and 24 kg forklift gas bottles, especially produced by the firm Ipragaz and complying with the TS 13317 and EN 1442 standards, are used for the forklifts we employ in our factories. The forklift gas bottles are produced from special high-resistance steel in accordance with the Portable Pressurized Containers Regulation (99/36/AT), and carry the Pi logo valid in European Union countries. The gas bottles' special equipment ensures that care is taken to keep user and environmental safety at a maximum. As well as this, energy consumption is kept at a minimum with the steel pipe system that reduces gas consumption in the forklift gas bottles we use; care is taken to keep environmental effects at a minimum with the clean energy we use. The use of these forklift gas bottles since the year 2007 has reduced fuel consumption from 2.62 kg/h to 2.44 kg/h and achieved fuel economy of approximately 7%. Moreover an approximate 50% reduction has been achieved in forklift malfunctions caused by the fuel system.

In the case of inter-warehouse and dealer/ distributor transport, basic goals are lowering costs and environmental impact by reducing the number of trips made. In our operations carried out with this understanding, we prefer to use vehicles that are capable of more transportation per vehicle, with lower fuel consumption per liter of transported product volume. In addition, the drivers working for subcontractor firms are given training on the subject of low/ efficient fuel consumption.

The refrigerators that store our products at outlets occupy an important place in our sales process. The contribution of our refrigerators to energy efficiency is a matter we pay careful attention to. Apart from the matter of the purchased and utilized refrigerators' contribution to energy efficiency, the other factors that we pay attention to are as follows:



**Refrigerators - Sound Level:** The maximum sound level of purchased refrigerators has been established at  $\leq 65$  Db(A). The refrigeration cabinet is tested for the specified climate class without fail.

**Refrigerators - Wiring:** To avoid fire hazards, wiring conditions that comply with EN 60335-2-24 are sought when purchasing refrigerators for European countries. For countries outside Europe, compliance with the relevant country's standards is observed.

**Refrigerators - Insulation:** Insulation features sought when purchasing refrigerators include a minimum polyurethane thickness of 40 mm, a density of  $35\text{kg/m}^3$ , and the absence of toxic gases in its composition.

**Refrigerator - Warning and Hints Labels:** Warning labels affixed to the purchased refrigerators should clearly and openly state the flammable gas contents. We also look for these warning labels on the product packaging, and demand compliance with European standards with all symbols.

The management of our supplier chain must reflect the quality of Anadolu Efes in order to present our consumers with the highest quality product. With this concept, we establish a sustainable relationship of trust with our suppliers and manage the related process together. With regards to the purchasing operations, the number of suppliers we work with totals about 1400 and at present we actively work with about 700 of these. Out of these suppliers, about 60-80 is the number of importers. These numbers are also an indication of the contribution that Anadolu Efes makes to the local economy.

Our company has a supplier evaluation system as part of the ISO 9001 practices. Anadolu Efes actively maintains the practice of working with the suppliers who earn the highest points as a result of this evaluation. **The main criteria dealt with in the evaluation are price, quality and delivery, which are of great importance to the sustainability of our business.**

Another practice that supports and ensures the continuation of this practice is visiting the suppliers and inspecting them for their compliance with pre-prepared control criteria for matters like environment, safety and transparency. During these inspections, detailed information about the suppliers is obtained by inspecting specifications of the following:

- Quality management systems (ISO 9001 etc.) and environmental management systems (ISO 14001 etc.) implemented by the suppliers
- Work safety system (OHSAS 18001 etc.) and product safety system (HACCP etc.)
- Quality policy and source management applications
- Product requirements
- Communication with customers
- Production planning
- Measurement, analysis and improvement work relating to product and processes.

In addition to these criteria, we expect our suppliers to show compliance in matters such as not to employ child labor, not to employ forced labor, ensuring employee health and safety, not to discriminate against any employee group, providing working conditions in accordance with the law, and carrying out operations in accordance with laws and regulations relating to the environment.





 ANADOLU EFES BREWERY AND MALT INDUSTRY INC. TURKEY BEER OPERATIONS • SUSTAINABILITY REPORT



# 5 Environmental Performance



# Environmental Performance

## ENVIRONMENTAL PRINCIPLES

Anadolu Efes considers the protection and improvement of the environment to go beyond a legal requirement, and has adopted it as an integral part of its activities. Our goal is to avoid any negative effects on the environment, while increasing the quality of our products and activities. Towards this aim, Anadolu Efes' principles are as follows:

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- To carry out our legal responsibilities relating to the environment.
- To focus on preventing pollution in all our activities.
- To reduce the use of natural resources, raw materials and energy.
- To reduce the effect of waste on the environment by keeping all waste under control.
- To continuously develop the environmental system.
- To cooperate with everybody we work with along the chain from supplier to customer, to contribute to the environmental awareness of employees and the community.
- To ensure the public's easy access to our environmental principles.

Anadolu Efes is aware of its responsibilities in matters of quality, environment, health and safety, and considers its "quality, environmental protection, health and safety" policy to be a basic principle in its operations. In the year 2004, the ISO 9001 Quality Management System, the OHSAS 18001 Work Health and Safety System and the ISO 14001 Environmental Management System as established and integrated in the 5 breweries, 2 malt and 1 hops production facilities operating within Anadolu Efes' structure.

Within the scope of the universally-accepted ISO 14001 Environmental Management System, all legal requirements relating to the environment are complied with and checked; all Anadolu Efes' environmental activities are monitored and environmental improvement projects are carried out.





## ENERGY MANAGEMENT

### ENERGY EFFICIENCY

Brewing is an operation which consumes energy more intensely in comparison with the food sector in general. In order to increase energy efficiency and reduce the emissions resulting from its operations, "Energy Councils" have been established within Anadolu Efes' organization. At the factories, the Energy Council is in charge of: carrying out checks to find and fix the points where energy use is excessive, to prepare machinery positioning procedures and check their implementation, to regularly monitor energy consumption, to apply new and develop original projects for the reduction of energy consumption, and to report all these activities periodically.

Between the years 2004-2008, the work of these "Energy Councils" in Anadolu Efes' 8 breweries has conceived important investment and improvement projects. During these years, a total of \$7,160,591 was invested in 83 projects, and \$10,368,885 worth of energy was saved as a result.

During these years, a total of \$801,076 was invested in steam boilers and \$1,332,683 in refrigeration facilities. Moreover, by investing a total of \$3,285,250 into the natural gas/ LNG conversion, all factories were converted to environmentally-friendly natural gas/ LNG.

Some of our Projects to Reduce Electrical Energy Consumption:

- The central Industrial Refrigeration Plant at workplaces was renewed with cutting-edge compressors and condensers to ensure significant savings on electricity consumption.
- Thanks to the Elektroflow energy saving system investments, workplaces were provided with both clean energy and savings.
- The spread of frequency-converting device implementation meant that pump and fan motors were run with a frequency converter, thus ensuring savings.
- All of our businesses switched to frequency converter air compressors and significant savings were made.
- The old evaporative condensers at our refrigeration plants were replaced with an efficient type of frequency converter condenser.
- Renovation efforts were carried out on the pumps in the water preparation and purification systems, replacing them with pumps using new technology with low energy consumption.
- The water pressure tank systems used at the businesses were completely replaced with efficient-type alternative systems that consume less energy.
- The energy-monitoring Scada systems were installed at all the businesses and all consumption is under constant monitoring.
- The suction air of the air compressors at all our businesses is obtained from cold environments, thus increasing compressor efficiency



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# Environmental Performance

## ENERGY MANAGEMENT

	İstanbul	Lüleburgaz	İzmir	Ankara	Adana	Konya	Afyonkarahisar
2008-Fuel (GJ)	174.909	90.519	269.077	229.858	163.110	267.294	155.244
2008-Electricity (GJ)	59.094	22.516	88.818	75.826	52.772	42.908	18.829
2009 January-February-March Fuel (GJ)	47.600	23.334	63.119	68.007	37.164	81.158	44.733
2009 January-February-March Electricity (GJ)	12.495	5.542	18.187	18.051	11.467	11.675	4.153
2008 Total Energy Use (GJ)	234.003	113.035	357.895	305.684	215.882	310.203	174.073
2009 January-February-March Total Energy Use (GJ)	60.095	28.876	81.306	86.058	48.631	92.833	48.886

Anadolu Efes Facilities Energy Use Data Obtained from the Energy Council

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When one considers renewable energy resources in this country, solar energy takes center stage. For this reason, feasibility studies are being conducted on the matter of electricity and steam production using solar energy at Anadolu Efes facilities, and the goal is to increase the level of renewable energy use by using solar energy in the future.



### EQUIVALENT ENERGY USE

Energy use values are monitored and evaluated on a monthly basis, and as a result of the investments and improvements made between 2004 and 2008, significant savings were achieved in equivalent energy consumption per unit product. Upon examination of equivalent energy values between 2004 and 2008, it is apparent that equivalent energy consumption per unit product dropped by 20% at breweries, and by 6% at malt production facilities. The effectiveness of the investments is clearly revealed by these figures.



As a result of all these improvement projects, approximately 155 million Kwh of energy was saved at the breweries and malt production facilities, and these savings are correspond to the annual electrical energy consumption of about 52,000 4-person families.



### GOAL 2009

We aim to reduce the equivalent energy consumption per unit product by 2% in our breweries.



## CARBON FOOTPRINT (GREENHOUSE GASES)

Anadolu Efes believes in the necessity for monitoring the impact of its activities on climate change. For this reason, it focuses on the efficiency of fuel and electricity production, production technology improvements, and the selection of technology that cause less CO<sub>2</sub> emission.

Investments amounting to \$3,285,250 were made between 2004 and 2008 for the conversion from fuel oil to natural gas or LNG as steam and water boiler fuel. As a result of this conversion project, Anadolu Efes achieved significant reductions in emission values. Moreover, as a result of other energy saving projects, equivalent energy consumption per unit product, and subsequently CO<sub>2</sub> emissions were reduced as well.

As a result of all these activities, CO<sub>2</sub> emissions were seen to drop by 23.2% from 12.98 kg CO<sub>2</sub>/hlsb to 9.97 kg CO<sub>2</sub>/hlsb at breweries, while a 9% improvement at malt production facilities reduced CO<sub>2</sub> emissions from 0.32 kg CO<sub>2</sub>/ton malt to 0.29 kg CO<sub>2</sub>/ton malt.

### ANADOLU EFES GREENHOUSE GAS EMISSION

	2008 Yılı			2009 January-February-March		
	Breweries	Malt Production Facilities	AEFES Total	Breweries	Malt Production Facilities	AEFES Total
DIRECT GREENHOUSE GAS EMISSION (Tons) *	40.176	15.380	55.556	10.102	5.337	15.439
INDIRECT GREENHOUSE GAS EMISSION (Tons) **	39.875	8.233	48.108	8.767	2.111	10.877
TOTAL GREENHOUSE GAS EMISSION (Tons)	80.051	23.613	103.665	18.869	7.448	26.317

\* The total greenhouse gas emission caused by fuel consumption within the factory.

\*\* The total greenhouse gas emission caused by electricity consumption within the factory.

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# Environmental Performance

## WATER MANAGEMENT

One of the raw materials in beer production, water comprises 90-95% of beer. Anadolu Efes is aware of its responsibilities in the matter of "water management". For this reason, it makes an effort to ensure the responsible management of water and water sources in the course of its activities.. Anadolu Efes gives importance to;

- The separate monitoring of different uses for water in all production processes (beer production, filling, etc.),
- The reporting of water consumption per unit product, and in the event of a significant change, investigating the probable causes,
- Carrying out projects for water consumption improvement

Significant improvements in water consumption were achieved with the monitoring and improvement projects implemented from 2004 to 2008. Despite the increase in beer production during this period, water consumption per unit product at Anadolu Efes' 5 factories dropped by 15.7%. While water consumption per unit product was 5.3 hl/hlsb in the year 2004, it had dropped to 4.5 hl/hlsb by 2008.

If we look at Western European sources relating to the brewing industry, the water consumption rate provided is 4 - 10 hl/hlsb (The Brewers of Europe, 2002). When a comparison is made with the consumption levels of beer producers in European countries, it can be seen that ever since its establishment, Anadolu Efes has always produced successful results in terms of water consumption, thanks to the advanced technology it employs.

At the malt production facilities, improvements carried out between the years 2004-2008 reduced water consumption by 13%.

Some of our water consumption reduction projects:

- Reduced water consumption resulting from the heat transfer processes was ensured by renewing old and inefficient condensers at the refrigeration plants.
- Recycling of the water from the filling machine vacuum pumps was established.
- Due to flash steam tank investments, recycling of the flash steam expelled into the atmosphere was enabled.
- Water savings resulted from the conversion from soft valve pumps to pumps with mechanical type valves.
- Recycling of the cooling water from the pumps' mechanical valves was enabled,
- Savings were achieved by transforming the cooling water in the carbon dioxide recycling plant into a closed cycle.
- The utilization of hot water from the cogeneration system in many areas of the business was established.
- By recycling the water expelled from the rinsing machine at the bottling and packing plants, its utilization for the pasteurization machines was established,
- Water savings were achieved by installing a conductivity controlled automatic bluff system in the cooling towers.
- Savings were achieved in irrigation water consumption by the partial conversion of irrigation equipment to a trickle irrigation system.

As a result of the improvements made in the factories' water utilization, approximately 1,800,000 m<sup>3</sup> of water was saved between the years 2004-2008; these savings achieved between 2004-2008 are equivalent to the water consumption amount of approximately 10,500 4-person families.



## GOAL 2009

We aim to reduce water consumption per unit product in the breweries by 1%.



### ANADOLU EFES WATER CONSUMPTION AMOUNTS

WATER SOURCE USED (Well Water, Mains Water, etc.)	BREWERIES AND MALT PRODUCTION FACILITIES		
	Well Water	Main Water	Total
Amount of Water Consumed in the Year 2008 (m <sup>3</sup> )	4.595.267	249.414	4.844.681
2009 Jan-Feb-March Amount of Water Consumed (m <sup>3</sup> )	1.066.576	56.801	1.123.377

## WASTE WATER

All Anadolu Efes factories have cutting-edge technology treatment facilities, which comprise a system and aerobic treatment units. When selecting treatment plant systems, we chose anaerobic reactors for all our breweries, which have a high initial investment cost but are more advantageous and efficient in terms of treatment technology. The advantages of these reactors are: low-cost treatment, low and negligible sludge amounts, the ability to meet heating and energy needs through biogas utilization, the fact that anaerobic sludge activity does not decrease even when it is deprived of nutrients (waste water), and their low space requirements.

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**We were one of the first in Turkey to use anaerobic reactors for our treatment plants. Thanks to this, we reduced the amount of treatment sludge formed in the event of only aerobic treatment by 350-400%. In addition to this, we established savings of 2-2.5 TL per unit waste water from ventilation, or, to put it another way, we achieved 350-400% savings on energy consumed.**



As well as choosing more efficient and environmentally-friendly technology during the installation stage, improvement investments are made at the facilities every year. During the 2004-2008 period, a total of \$4,102,192 was invested in the breweries and malt production treatment units. In 2008, \$1.2 million was invested in the treatment facilities of the Ankara Brewery, increasing its capacity. The additional third anaerobic reactor, second ventilation pool and the related facilities and equipment were completed and their operation initiated in May 2008.

Moreover, preliminary work has commenced for projects like the recycling of yeast, in accordance with the principle of preventing waste water pollution at its source; beer recycling; and the separation of kieselguhr at its source and its utilization. The aim of this work is to reduce the unit pollution loads of waste water, as well as reduce treatment costs as a consequence.



# Environmental Performance

## WATER MANAGEMENT

### ANADOLU EFES FACTORIES' WASTE WATER TREATMENT PLANT RECEIVING ENVIRONMENTS AND THE AMOUNT OF TREATED WASTE WATER

	RECEIVING ENVIRONMENTS	TREATMENT METHOD	Amount of Waste Water Discharged (m <sup>3</sup> )	
			2008	2009 (Jan-Feb-March)
İSTANBUL	(Municipal Facilities) İSKİ Channel	Anaerobic Treatment (EGSB Reactor) + Aerobic Treatment	484.620	82.660
LÜLEBURGAZ	Soğucak (Evrensekiz) Steam	Anaerobic Treatment (EGSB Reactor) + Aerobic Treatment	239.541	56.345
İZMİR	(Municipal Facilities) İZSU Channel	Anaerobic Treatment (EGSB Reactor) + Aerobic Treatment	803.667	190.778
ANKARA	Ova Brook	Anaerobic Treatment (UASB Reactor) + Aerobic Treatment	671.701	155.345
ADANA	(Municipal Facilities) ASKİ Channel	Anaerobic Treatment (UASB Reactor) + Aerobic Treatment	664.512	149.451
KONYA	DSİ Drainage Channel	Aerobic Treatment	547.035	153.259
AFYONKARAHİSAR	Akarçay (Municipal Facilities)	Aerobic Treatment	342.262	72.325

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## PACKAGING AND RECYCLING

Anadolu Efes is an environmentally-friendly firm that is aware of the importance of the environmental effects of packaging materials, the re-using of glass packaging and the recycling of packaging waste. Anadolu Efes uses re-usable or recyclable barrels, glass bottles and metal cans for its products. Glass bottles are the most widely-used packaging for products, and 78% of all glass packaging consists of refundable glass bottles. Refundable glass bottles are an environmentally friendly packaging material. Anadolu Efes customers return their empty bottles to outlets and receive their deposit, then the refundable bottles are carefully cleaned at the breweries before being presented for re-use.



It is known that a beer bottle can be re-used approximately 8-10 times, and is 100% recyclable without glass suffering a significant loss of quality and amount. For every ton of returned glass, approximately 100 liters of petrol consumption is saved. The melting and re-utilizing of broken glass uses 32% less energy than the original process. In other words, when one glass bottle is recycled, the amount of energy saved would power a 100-watt bulb for four hours; thus the air pollution formed during the production of glass is reduced by 20%, and water pollution by 50%.

Out of the refundable glass bottles collected, those that have completed their economic lifespan are put aside at the Brewery filling stations with the help of special detectors. After being shattered, these bottles are given to licensed recycling firms and the glass is recycled.

During the 2004-2008 period, we enabled the recycling of glass bottles amounting to a total of 82,899 tons, with 34,858 tons of refundable bottles collected and re-used, and 48,021 tons of single-use bottles collected with the assistance of the CEVKO Trust.

### GOAL 2009

At Anadolu Efes, as well as using environmentally friendly packaging materials, we are developing projects towards using less material for packaging without compromising on quality. Through a project carried out in the year 2008, we designed 17% lighter single-use Efes bottles. We plan save considerably on glass packaging and thus contribute to the environment with the launch of the new bottles on the market in 2009.



# Environmental Performance

## WATER MANAGEMENT

**Anadolu Efes is one of the founding members of the CEVKO Trust.** The CEVKO Trust is approved by the Ministry of the Environment and Forestry, and the only authorized body in Turkey. The recollection and recovery/ recycling of marketed Anadolu Efes product packaging, according to the proportion specified in regulations, is carried out through the CEVKO Trust.

Between the years 2004-2008, 4,490 tons of cardboard boxes, 48,041 tons of glass, 1,126 tons of plastic, and 10,043 tons of metal waste resulting from the consumption of Anadolu Efes products were recovered through CEVKO, and the re-use and recycling of this waste enabled their re-introduction to the Turkish economy. At the same time, we contributed through CEVKO with projects such as training, awareness raising, support of municipalities.

During the production process, all other packaging waste apart from glass is collected at source, as with glass, and re-introduced to the economy through firms licensed by the Ministry for Environment and Forestry. In this way, packaging waste originating from Anadolu Efes factories is continuously monitored and waste amounts are kept on record.

By recycling the waste paper collected directly from the factory and from general circulation with CEVKO's assistance, Anadolu Efes saved approximately 168,000 trees, 40,600,000 kWh of energy and 262,000 m<sup>3</sup> of water. With the re-use of glass bottles, the equivalent of 8,250,000 liters of petrol was saved.

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## WASTE MANAGEMENT

Anadolu Efes gives great importance to the issues of reducing waste at its source, re-using, recycling. Based on the principle of reducing waste, the malt production facilities were established in the Konya and Afyon regions to enable easier access to raw materials, and in order to enable easier customer access to the products, the breweries were established in 5 different locations, serving different regions.

It is possible for side products and waste that materialize throughout the malt and beer production process to be used as raw materials in other industries and benefit the economy. Anadolu Efes is aware of this potential, and maintains its work on recycling and re-using alternatives in relation to this matter. All side products and waste that form during the production process are collected separately, and an inventory of these products is kept.

The straw produced during the barley processing stage of malt production is collected separately, and other waste (grass, husk, low-grade barley) is fathered during production and transformed into pellets. Later, all these side products are made use of as animal feed. From 2004-2008, a total of 43,326 tons of pellet production was achieved, and a total of 11,044 tons of straw was reintroduced into the economy for utilization.

### 2008 NON-HAZARDOUS WASTE AMOUNTS AND DISPOSAL METHODS

	TOPLAM AMOUNT (kg)	DISPOSAL METHOD	TOTAL (Depending on Disposal Method)	Oran (%)
SCRAP PAPER & CARD	1.290.711	Recycling	13.107.706	62,0
SCRAP NYLON & PLASTIC	839.706	Recycling		
SCRAP GLASS	8.346.005	Recycling		
SCRAP WOOD	2.631.284	Recycling		
TREATMENT SLUDGE	8.017.641	Regular storage (Deponi Area)	8.017.641	38,0
<b>TOTAL</b>	<b>21.125.347</b>		<b>21.125.347</b>	

Another of the most important waste products created during production is unused brewer's yeast. Waste yeast is disposed of by sending it to the treatment plants. However, as yeast contains mainly protein and carbohydrate, with a high vitamin content, it is valuable input for the feed and pharmaceutical industries. Thanks to Anadolu Efes, projects are underway in connection with the necessity for the recovery and re-introduction to the economy of waste yeast as a valuable side product. Referring to literature and implementation examples in European countries, studies were initiated at universities in 2004 for the formation of this market and the recovery of waste yeast. The first pilot plant for the dehydration and desiccation of yeast was established in the year 2005 at the Ankara Brewery, and in the year 2006 at the Izmir Brewery. The system is under constant development, and research continues. The market for using side-produced yeast as animal feed is developing day by day.



# Environmental Performance

## WASTE MANAGEMENT

Approximately 2,700 tons of yeast were re-introduced to the economy between 2005-2008, and the recovery amounts, investments and improvements increase every year.

Barrels, containers, accumulators, vegetable waste oil and other similar waste products are sent to licensed firms and their recycling is enabled. Medical waste, oils, batteries, forklift tyres and other waste products are collected separately at their source and disposed of in accordance with the relevant regulations.

At the end of the year 2008, a sludge-drying facility was invested in for the Izmir Brewery treatment plant sludge. Involving an investment of 500,000 dollars, the facility dries the sludge from the treatment plant, which has a water content level of 65%, and reduces its water content to 10%. This facility not only reduces the volume of the sludge, but also establishes its stabilization. Through this investment, it will be possible to use the treatment sludge as fertilizer, and after procuring the requisite legal permission, this treatment sludge, which is agriculturally quite fertile, will no longer take up unnecessary volume at municipal dumps and will be made use of.

### 2008 HAZARDOUS WASTE AMOUNTS AND DISPOSAL METHOD

DISPOSAL METHOD	Amount (kg)	Percentage(%)
Storage	1.429	2,9
Recovery	41.178	83,6
Recycling	6.636	13,5
<b>TOTAL WASTE</b>	<b>49.243</b>	<b>100</b>

## ODOR MANAGEMENT

The treatment plants were designed during the installation stage with units that enable odor-causing gases to be collected and disposed of, again at the treatment plant. Moreover, odor-producing units are sealed, and these precautions have minimized odor emission.

In addition to these systems at the treatment plants, a treatment plant odor removal system was installed at the Ankara and Istanbul Breweries in the year 2008. In the ventilation pool and sludge concentration pools, in order to remove bad odors stemming from H<sub>2</sub>S and the other bad odor-producing compounds in waste water, a spray system comprise 38 nozzles at the Ankara factory and 68 nozzles at the Istanbul Brewery is used. With this spray system, odors are not suppressed by other odors. The sprayed chemical reacts with H<sub>2</sub>S and other substances that cause odor, changes the chemical structure of odor-producing substances, and causes the elimination of odor.

Moreover, with the intention of eliminating the malt odor discharged by boiling flues, similar spraying systems were installed consisting of 15 nozzles for the 5 boiling flues at the Ankara Brewery, and 12 nozzles for the 4 boiling flues at the Istanbul Brewery.



## OUR AWARDS

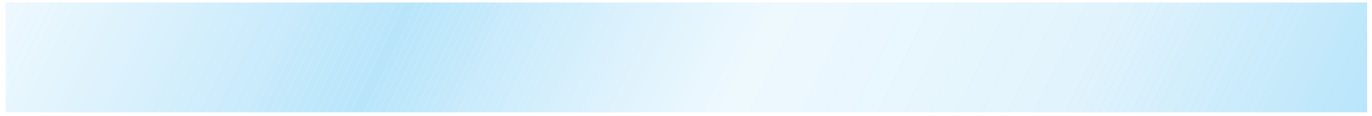
Organized by General Directorate of Electrical Power Resources Survey and Development Administration, which carries out work aimed at increasing energy efficiency in industry, and affiliated with the Ministry of Energy and Natural Resources, the eighth Energy Efficiency in Industry Project Contest was held in Ankara on 17-18 December 2007. The Anadolu Efes Luleburgaz Brewery entered this contest, which had a total of 22 participating firms from across Turkey, in two categories. After the acceptance of the application files, the projects were successfully presented to the seven-person jury, comprising representatives from this country's respected institutions and universities, and won an award in both categories.

An original project that is a first in Turkey, the "Increasing Efficiency with the use of Economizers and Recuperators in Steam Boilers" project won the "Special Jury Award" in the Project Category. The plant to most successfully reduce their energy consumption during the most recent three-year period, with over 10 projects implemented in 2004, 2005 and 2006, the Luleburgaz Brewery was awarded first place in the "Most Efficient Industrial Facility" category and elected "Turkey's Most Efficient Industrial Facility of 2007".

Thanks to these important energy saving projects implemented at the Luleburgaz Brewery, consumption of natural resources was reduced, with the annual CO<sub>2</sub> emission dropping by 1,936 tons. Due to these savings, equivalent to the annual emission of 800 cars, an environmental effect equivalent to 5,600 trees was created. As well as this, the cooling water re-utilization projects carried out at the same time saved water equivalent to the annual water consumption of 225 households.

The Anadolu Efes Afyon Malt Production Facility was awarded a certificate of thanks for their environmentally aware work, detected during monitoring and inspection checks carried out by the Afyonkarahisar Province Regional Environment and Forestry Office; it was presented with a certificate from the Regional Environment and Forestry Office.

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ANADOLU EFES BREWERY AND MALT INDUSTRY INC. TURKEY BEER OPERATIONS • SUSTAINABILITY REPORT





# Community Relations

## CONTRIBUTION TO LOCAL ECONOMY

The economy is a dynamic environment where many different actors play a part. Whatever the scope, every actor's role is important, and complements the other. Companies are the indispensable actors on this stage. The more mature and developed an economy is, in terms of economical environment infrastructure, technical capacity, financial ability and accumulated knowledge, the more influential, profitable and powerful are the companies.



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We increased our market share to 86% in the year 2008. We value this as an indication of the success we achieved as a result of our work. But for us, enlarging the market is a more important goal than enlarging our market share. As our priority in order to achieve this, we support the local economy's development. Because we know that a stronger economic structure is needed for us to reach our desired market size. We are aware that, as with all actors on the financial stage, we too have a responsibility for establishing this strong structure. For this reason, the fact that employees evaluated "contribution to local economy" as the company's highest priority topic during the planning stage of the report's content, was pleasing in terms of the way it indicates how Anadolu Efes employees have adopted our responsibilities in this area and shows our motivation in the development of our employees.

As we have accepted that making a contribution to the local economy is a fundamental responsibility, most of our efforts have a component that benefits this matter directly or indirectly. While a portion of these comprises positive effects that emerge as a result of our activities, another great portion comprises the project efforts we implement for this aim directly. It is our basic goal to ensure development in the area of economic life created by Anadolu Efes. In this way, we will have ensured that the created economic growth acquires the quality of directly supporting Anadolu Efes' development.

We aim to establish long-lasting change, rather than one-day or one-time effects, with the projects we develop. For the establishment of this, we are working on increasing demand, enhancing the society in which this demand would form, and increasing production that would satisfy this demand. In order to achieve this goal, we consider it necessary to increase the activities of existing actors both in the area of production and service, and of consumption, and to introduce new actors to the stage. For this reason we give priority in our projects to the existence of an attribute that increases employment opportunities and supports, directly or indirectly, the structural or volume growth of our market. As a general outlook, we believe in the virtue of "teaching somebody to fish rather than giving them a fish". However, in certain situations it does happen that we "give fish" in order to achieve the first movement towards the structure we desire, as well as creating a "fishing lake" from scratch.



The fundamentals of our contributions to the local economy consist of tax, export revenue, direct or indirect employment and international branding resulting from our activities, as well as the economic vitality and growth that ensues from the application programs we develop toward the advancement of the agricultural, brewing and tourism industries in particular, and from the sporting and art-culture events that we organize. We have maintained and increased our activities in these areas for many years. In the future, we will add new projects to the existing ones. Because we know that we still have a lot of work to do in order to raise every individual person's worth in every corner of the country.

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## SUPPORT FOR TURKISH AGRICULTURE

Agricultural products comprise one of the Turkish economy's most important production items, and almost half the employed population gets earns a living from the agricultural industry. With improvements in agricultural activities, significant progress can be made in the development of the local economy. There is an evident need for R&D in the area of developing more efficient techniques for products and processes in particular, and to provide information that encourages the spread of the implementation of these techniques. The agricultural products barley and hops are our main raw materials in beer production. For this reason, a large portion of our work towards establishing a contribution to the local economy consists of support in the area of agriculture. Beyond the intention of securing our main raw materials supply, at the root of these efforts lies the awareness of contributing to Turkish agriculture and therefore our economy through local suppliers. Because when looked at from a purely commercial perspective, procuring malt barley and hops from abroad is more advantageous in the short term. However, our aim in supporting the products of our agriculture is to procure all the malt barley and hops from the varieties we grow ourselves, without being dependent on outside sources, from our own country through contractual production; and to turn them into export products by increasing the production of malt barley and hops.



# Community Relations

## CONTRIBUTION TO LOCAL ECONOMY

Barley - Hops Supply (ton)	2008	2009 (Jan-Feb-March)
Local Barley	126.263	0
Imported Barley	56.285	10.625
<b>Total Barley Procurement</b>	<b>182.548</b>	<b>10.625</b>
Local Fresh Hops Production	1.007	0
Local Hops Pellet Production	265	0
Local Hops Pellet Procurement*	66	92
Imported Hops Pellet Procurement	220	75
<b>Total Hops Pellet</b>	<b>551</b>	<b>167</b>

\*Amount purchased from Marketplace OtGul Co-op

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For this reason, the greatest portion of our work comprises R&D activities towards developing barley and hops varieties and the growing of these varieties with highly efficient, high-quality sustainable methods that involve less environmental effects; and informational activities toward sharing the resulting technical knowledge with farmers. As well as these, we use material and financial support to encourage existing producers to convert to modern production using the seed, seedling and production techniques that we have developed, as well as the participation of new producers in the industry.

Supportive efforts of this kind are large projects demanding extremely intensive operational and financial resources, and need to be managed by professionals who are experts in their field. Long ago appreciating the importance of the matter for both ourselves and for Turkish agriculture, we established the requisite organizational and financial structure. The Agricultural Product Development Department, which we formed in the year 1982, carries out R&D and fieldwork support studies on the issue of variety and production technique development. Our R&D and application work on the issue of hops production is carried out by Tarbes, which operates within Anadolu Efes. Thanks to this structuring, we have obtained extremely positive results from the resulting R&D projects.

The Agricultural Product Development Department was approved by the Agriculture and Rural Affairs Ministry as a Private Sector Research Institution in 1982 and its work was moved to an official status. As a result of our R&D efforts, 13 malt barley and 7 hops varieties, which are suitable for the most efficient production under our country's conditions, were developed and patented.







## SUPPORT FOR MALT BARLEY PRODUCTION

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As malt is what gives beer its flavor and color, the quality of the malt used directly affects the quality of the product. Not all barley can be used for malt production. The barley needed for the production of high-quality malt, in particular, must possess certain features. Although Turkey's annual malt barley requirements amount to about 200 thousand tons, only approximately 150 thousand tons of the 7.3 million tons of barley produced (TUIK Vegetable Production 2nd Estimate) can be used in malt production; the rest is met by import. The predicament in malt barley supply affects Anadolu Efes, being a company that aims to meet all its needs domestically. Since the establishment of the Agricultural Product Development Department, we have been working on R&D to eliminate this predicament since 1982.

The high-quality malt barley produced internationally comprises summer crop varieties. Due to climatic and soil conditions and the insufficiency of irrigation facilities across a significant portion of the country, it is literally impossible to produce these summer crop varieties. Summer varieties can be grown along the coastal belt and in the southeast Anatolian Region, where the climate is suitable. We grow this kind of strain, which we have developed, in Adiyaman and Adana and their surroundings.

Considering the necessity for the development of productive strains with high quality malt potential, suitable for Turkey's climatic, soil and irrigational conditions, we began our investigation on this matter. With the suitable samples that emerged, we carried out hybridization work with the malt barley strains used abroad. At the end of this work, we applied to the Agriculture and Rural Affairs Ministry for the patenting of 30 new malt barley strains over 27 years. 13 of our applications resulted in patenting, while the patenting process of 3 of them still continues.



# Community Relations

## CONTRIBUTION TO LOCAL ECONOMY

Patented Malt Barley Strains	
Year	Strain
1992	Efes 3
1998	Anadolu 98 Efes 98
1999	Angora
2001	Çumra 2001 Çatalhöyük 2001
2003	Başgül
2005	Atılır Fırat Meriç
2006	Erciyes
2007	Yıldız Durusu

We have not restricted our support for malt barley production to R&D work towards developing new strains. We have observed that we also have to produce the first seed crops of the strains we developed, ensure their widespread use, and enable their production under the most efficient conditions. To start with, we chose Catalca, Eskisehir, Konya, Ankara and Adiyaman as "seed crop production areas" for the production of seed crops for the strains we developed. We give support to the production of seed crops in these areas. We also carry out joint projects with the relevant departments in the Agriculture and Rural Affairs Ministry on the issue of seed crop production. Within this capacity, the Malt Barley R&D and Certified Seed Crop Production Projects, destined to set an example for public-private sector joint ventures, are being maintained together with the Field Crops Center Research Institute, affiliated with the Agricultural Studies Headquarters. Within the framework of a project implemented jointly with the Agricultural Affairs Headquarters (TIGEM), we carried out seed crop production at Altinova, Gozlu, Konuklar and Sultansuyu agricultural businesses.

The production of malt barley involved financial cost and risk for our farmers. For this reason, our producers needed to be supported with a financial plan as well. Because of this, we initiated a "contractual production" plan aimed at farmers. Within the structure of this plan, we distribute seed in exchange for products, without demanding financial compensation. With the contracts that we draw up, we acquire products from our farmers according to our quality specs. 1500 of our farmers still work contractually, and seed is distributed in return for products.

While supporting the production of malt barley, enabling quantitative growth is not the only indication of success in our basic aim of "developing local economy by supporting Turkish agriculture". We also consider enabling qualitative improvement to be a requirement. As we consider that this can be achieved by reducing the environmental impact of production and increasing its efficiency, we are working on developing processes. We have achieved significant improvements in this area as well. We carry out awareness efforts for the sake of guiding our farmers towards more efficient and healthy production techniques. Our efforts focus on irrigation, manure and agricultural chemicals in particular. Thanks to the planting of the strains we initially developed, we are obtaining a 10-15% higher yield in malt barley production.

Another significant problem in plant production is incorrect practices in manure and chemical application. When manure and chemicals are applied correctly in terms of type and amount, they offer benefits. When used without awareness, not only does the quality of the product drop, but problems may occur in terms of environmental and human health. For example, the application of nitrogenous manure can have the effect of increasing the nitrate load of drinking water sources by tainting subterranean water. However, maintaining a low level of protein in malt barley is an important requirement. For this, nitrogenous manure must be applied in much lower doses. The informative work we carried out in this matter has helped us to reduce our producers' use of nitrogenous manure to considerably low levels. As a result, not only do we obtain malt barley of the required quality, but also we have managed to prevent the negative impact of nitrate on water sources. We have also made great strides in reducing the application of agricultural chemicals. Our producers apply



chemicals in order to render their products immune to various plant diseases and pests. However, it is also possible to reduce the amount of this chemical application. With this aim in mind, we carried out amendments to increase the resistance of our developed strains against disease. As a result of this work, the need for agricultural chemicals in production has decreased.

As a result of our product development work, we are getting positive results on the issue of reducing the use of natural resources in malt production in particular. We monitor the water and energy consumption impact of our new barley strains during malt production. When compared with the most commonly-produced barley strain in our country, Tokak, and depending on external environment and administrative conditions, the Atilir and Firat strains that we have developed are 12-24% more efficient in terms of electricity consumption during malt production, 18-22% more efficient in terms of fuel consumption, and 40-47% more efficient in terms of water consumption.

Barley Strain	Average Unit Source Consumption		
	Electricity (kw/s)	Fuel LNG (sm <sup>3</sup> )	Water (m <sup>3</sup> )
Atilir	101	57,07	4,68
Firat	117	54,42	5,26
Tokak	133	69,71	8,81

We have provided active support for malt barley producers for 27 years. As a result of these efforts, we create a 30 million dollar work volume for the industry, employment opportunities for thousands of people from farmers to business employees, and contribute to the livelihood of tens of thousands of people.

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## SUPPORT FOR HOPS PRODUCTION

The perennial hop plant is one of beer's indispensable raw materials, alongside malt and water. It provides beer with bitterness, preservative properties and aroma. All hops produced in this country are used in the production of beer. Anadolu Efes obtains its local hops requirements through Tarbes. As well all the fresh hops it procures from contractual producers every year and processes, Tarbes also tries to meet our breweries' hops requirements with pellet hops purchased from the "Pazaryeri ve Köyşleri Şerbetçiotu Ekicileri Kooperatifi. Anadolu Efes aims to satisfy all its hops requirements from within the country. Towards this aim, significant developments have been achieved in the yield and quality of hops with R&D efforts maintained since the year 1982. Newly developed strains have benefitted our company by the 10% increase in alpha acid proportion. Thanks to the characteristics of the strains developed by Tarbes, and improvements in the producers' facility types and practices made by Tarbes' technical staff, the yield obtained per unit area has risen by 25-30% and increased the income of regional farmers. As a result of Tarbes hops strain development efforts, the Ministry for Agriculture has been applied to for the patenting of 8 new hops strains in 27 years, and 7 of these have resulted in patenting.





# Community Relations

## CONTRIBUTION TO LOCAL ECONOMY

As well as raising the yield and quality with R&D work carried out with the aim of satisfying its entire requirement for hops through local production, Anadolu Efes continues its efforts to increase Tarbes contractual production. The last ten years have seen an increase of 80% in Tarbes contractual production areas, and a 130% increase in fresh hops purchasing. Thanks to their contractual production, Tarbes enables 500 farming families to maintain agricultural activities as a means of livelihood with guarantee of purchase. Moreover, by increasing their yield with new strains, and enabling input control with the support of technical staff, it contributes to an increase in their income.

We distribute the rhizomes (the root parts necessary for the production of hops) of our new strains to our producers without asking for any financial compensation, and our contracts provide the producers with guarantee of purchase. Due to this, the farmer knows and has guaranteed his income at the end of production well in advance, thus his financial risks drop considerably. As well as guaranteed purchase contracts, we offer credit and various means of financial support, for the sake of increasing the production ability of the hops producer.

### Patented Hops Strains

Year	Strain
1992	Efes Aroma
1997	Ege Erciyes Güney
1999	Tarbes 99 Anadolu 99
2001	Pazaryeri 2001

## EMPLOYMENT FOR THOUSANDS OF PEOPLE

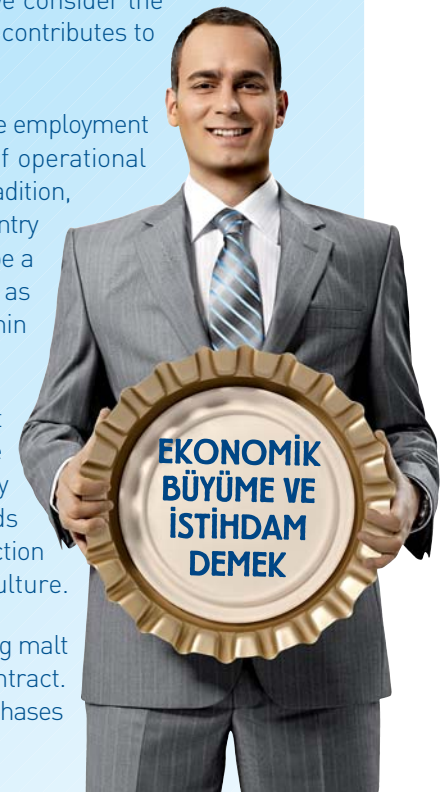
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Turkey is a country whose large population includes a significant proportion of young people. Therefore, one of the most important issues facing economic progress is the provision of employment opportunities to this dynamic population. Every individual added to the employed workforce is a step taken towards an increase in the country's welfare. Also, when we consider the structure of a traditional Turkish family, every created work opportunity contributes to the livelihood of more than one person.

When productivity is preserved, every establishment would like to increase employment opportunities. Because an increase in employment is an indication of operational achievement and growth. As a reflection of the 40-year Anadolu Efes tradition, we perceive contributing to an increase in employment throughout the country as a significant goal, and consider a planned increase in employment to be a natural result of sustainable growth. Besides this, we evaluate our role as employer in a framework beyond that of the employees we employ within the company.

We offer work opportunities to 1,791 people through direct employment within Anadolu Efes. However, this figure does not reflect the entire employment effect of our activities. Every bottle of beer produced by Anadolu Efes contributes to the employment and livelihood of thousands of people across a wide range of industries, from barley and hops production to logistics, dealers and outlets to the fields of tourism and art and culture.

For example, a total of 3000 farming families earn their living by producing malt barley and hops for Anadolu Efes, 2050 of which are under purchase contract. The agricultural production and processing of our agricultural product purchases provide employment opportunities to about 10,000 people.





One of our primary goals is to contribute to an increase in the welfare level of the local population in regions where we operate. For this reason, we give priority to utilizing local human resources in an operational region, so long as there are candidates with qualities appropriate to the requirements of the relevant position.

Shortening a product's travel route between production and consumption areas not only increases efficiency but also reduces environmental impact. For this reason, we are working towards carrying out production in different geographical regions that are in proximity to areas of consumption. When these efforts materialize, our contribution to local employment will increase significantly.

Ever since the first years of our establishment, we have maintained our ceaseless support for culture, art and sports. Within this framework, we give our support to local cinema productions, subsidized or unsubsidized theater, festivals and events. In the realm of music, as well as our support for existing projects and events, we organize the "Efes Pilsen Blues Festival", "Efes Pilsen One Love Festival" and "Miller Freshtival" music festivals and the "Rock'n Dark Music Contest" and "Miller Music Factory" contests.

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# Community Relations

## CONTRIBUTION TO LOCAL ECONOMY



Apart from art and culture, another of our important investment areas is sport. We support a number of branches, primarily basketball and football. Our greatest investment in this area is the Efes Pilsen Sports Club, founded in 1976 and earning the title of "Champion of Champions". As well as this, we have been the official sponsor of the Turkish National Football Teams and over ten football clubs since 2002, while we have been the official sponsor of the Turkish National Olympics Committee since the year 2005. Moreover, ever since 2002 we have organized the "Efes Pilsen Cup" in Antalya during the football pre-season period, with popular football teams participating from all over the world. And since the year 2001, we have organized one of the world's leading basketball tournaments, the "Efes Pilsen World Cup", together with the Turkish Basketball Federation, and attended by the Turkish A National Basketball Team and the world's leading national basketball teams. You can access detailed information about our work in the areas of culture, art and sports from the "Community Investments" section.

Our priority for the support we provide in the areas of sports, art and culture is to contribute to the social and cultural advancement of our community. However, one should not overlook the economic dimension

of activities in these fields. Projects in the realm of cinema and theater in particular, which have so far been unable to reach the desired industry maturity in this country, can be revived through sponsorship. Thanks to this support, artists find the chance to realize their projects, and each project creates significant employment opportunities. As well as a similar impact created through the support we give to the music industry, the festivals that we organize every year have a significant growth effect on trade. For example, the "Efes Pilsen Blues Festival" is organized in 20 cities. As well as the advancement of the art-culture scene in each city visited within the structure of the festival, meeting requirements for equipment and staff contributes to the local economy. Besides this, as cities become a regional center of attraction for the duration of the event, visitors come to the city from nearby areas. This also has a significant effect on the animation of the local economy.

Besides art and cultural activities, the support that we provide in the sports arena also creates a significant economic value. For instance, the "Efes Pilsen Cup", which we have organized since the year 2000, Antalya has been shown to be an extremely suitable place for professional football clubs' pre-season training, and clubs have been encouraged to choose Antalya for their camps. Along with these activities, thousands of football clubs from all over the world have visited Antalya approximately 20,000 times. When one considers that the winter months pass relatively quietly in terms of tourism, this project has had a significant impact in terms of variety in economic activities and spreading them throughout the year.

**Apart from direct economic effects, the sports clubs, art-culture projects and various activities that we support contribute to promoting this country. Efes Pilsen Basketball Team's winning of the European Cup, worldwide sports enthusiasts' interest in the football and basketball tournaments that we organize, the local and international screening of the cinema productions that we support and the awards that they win, all carry huge value in terms of the worldwide promotion of the "Turkey" brand.**



## SUPPORT FOR THE “TURKEY” BRAND

**TURQUALITY®**

We are the fifth largest beer producer in Europe, and the fourteenth largest beer producers in the world. Our products reach consumers from over 60 countries worldwide, from the Adriatic to the Pacific Ocean. We maintain continuous promotional efforts in order for our brands to appeal to a worldwide consumer audience.

We believe that our international brand investments should be carried out with a collective awareness. For this reason, we make an effort to promote the “Turkey” brand, not just our own brands. Because we believe that every Turkish brand that reaches consumers in international markets will enable the sale of another brand, and consequently contribute to the Turkish economy in general.

Due to our belief that collective awareness and action towards this goal will bring success, we have participated since the year 2007 in the Turquality project, initiated by the Undersecretariat of Foreign Trade, TIM and the Exporter Unions in the year 2003, and we carry out our international brand promotional efforts with the support of the state within this framework.

TURQUALITY® is the world's first and only state-supported branding program formed with the aim of helping firms that have product groups with branding potential and retain our country's competitive advantage, providing them with management knowledge, enabling their institutionalization and development, in a way that covers all processes from production to marketing, sales to after-sales services, and allowing them to become a global player in international markets with their own brands.

“The pilot operations of this project, which was initiated in the year 2003 with the required legal arrangements and the necessary technical planning of a study group formed with the help of the Undersecretariat of Foreign Trade, TIM and the Exporter Unions, were carried out in the year 2004, targeting the textiles industry. With the success of the results achieved, the project has been maintained since 2006 to include all industries. You can access more detailed information at [www.turquality.com](http://www.turquality.com) .”

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# Community Relations

## CONTRIBUTION TO LOCAL ECONOMY

### SUPPORT FOR THE ADVANCEMENT OF THE INDUSTRY

We believe that the beer industry in Turkey needs to make significant progress in order for it to reach its potential size. As the industry's leading company, we have developed various projects to enable this growth. The industry does not experience supply problems that would prevent products from reaching consumers. With regards to their ease of purchase and accessibility, Anadolu Efes's products in particular carry very low logistical and pricing risks. We therefore focused our market development efforts on the development of a beer culture in Turkey, the provision of better service quality at existing points where beer meets the consumer, and the proliferation of these points.

#### Beerhouse Improvement Project

This country's beer culture has not yet reached the point that we would like. In order to change this situation, we believed in the need to transform the sites where consumers encounter our products, starting with pubs, into venues where consumers from all social segments could share pleasant conversation together in a modern environment. To this aim, the basic mission of the Pub Improvement Project is to ensure the satisfaction of both beer consumers and pub owners. Within the structure of the Pub Improvement Project, which we have carried out since the year 2000 with the aim of developing a beer culture, we have transformed over 350 pubs into modern, clean, enjoyable and elegant venues.

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#### Efes Beer Café

Taking the "Pub Improvement Project", which we have maintained since the year 2000, one step further, we continued by creating places for drinking beer with different concepts. We designed different concepts to appeal to different socio-economic segments. We developed the concepts of "Efes Classic" for the low socio-economic segment, "Efes Blue" for the middle and slightly higher than middle segment, "Efes Nostalgia" for the upper socio-economic segment, and the "Efes Beer Café" for university students in particular. While introducing beer-lovers to the pub culture with "Efes Beer Café Classic", we offer a different alternative to the "café" enjoyment of young people with a new concept called "Efes Beer Café Modern". So far, we have opened 13 "Efes Beer Café Classic" and 2 "Efes Beer Café Modern". Today Efes has a total of 775 project points.

Décor efforts comprise the first stage of the projects. Apart from this, there are two training stages that we implement. The first of these training packets, which we prepare for the management and employees of an establishment, deals with the matter of beer presentation. The content of this educational packet comprises information about the technically and visually ideal methods and equipment for presenting beer to the consumer. In the second stage of the training program, instructive information is given about the food eaten alongside beer. Thanks to this education, business owners acquire knowledge about the products they can sell together with beer, and find the opportunity for diversification.





While the number of what we call open points, i.e. environments where beer is consumed in-house (beer houses, pubs, cafes, restaurants), has dropped by 3% throughout Turkey since 2007, the number of our project points has risen by 16%. With a 21% increase between 2007 and 2008, our project locations were the channels with the highest sales improvement. Compared with standard pubs, 20% more consumption occurs per project point. Comprising a mere 3% on the basis of total outlet points, our project points achieve an 8% share on the basis of total sales. To put it another way, while the 2700 pubs and bars across Turkey achieve 25% of our total sales, just 775 project points achieve 8% of our sales. Based on this point, our project venues make the greatest contribution to the growth of the beer market and the spread of a beer culture.



### Efes Club Professional

One of the projects we carry out for the development of a beer culture is the Efes Club Professional project. Quality service requires a proper foundation and administration as well as quality products. However, it is the staff that forms the basis of service. With Efes Club Professional, which we establish to add value to the lives of the barmen and service staff whom we see as an important bridge between us and the consumer, we aim to offer support to the people we work with by brightening up their lives as well as forming an occupationally enviable professional body.

Efes Club Professional is a club established with the participation of actively working barmen and service staff. Professionals who wish to be a part of this club can obtain free membership. With thousands of members, the Club provides these professionals, who work in the front rows of the industry, with a window to breathe, and a place where they can feel that they are not alone.

The first of Efes Club Professional's activities is to organize training to increase the occupational knowledge and skills of professionals. These training sessions primarily deal with the issues of brewing history and production processes, and the service of beer and accompanying meals according to beer type. However, training is not enough for the advancement of service staff. Staff involved in service must also have a strong social side and be successful in interpersonal relations.

For this reason, we aimed for Efes Professional Club to establish a platform to enable the social development of professionals, beyond its function of closing the gaps in occupational training, which is also such an important requirement in the service industry. Thanks to Efes Club Professional, our members find the chance to socialize with various activities. These gatherings not only enable the professionals to get to know each other better, but also facilitate their sharing of professional experience. For the sake of establishing an alternative medium for educational and communication projects, we first set up a website belonging to the club. Through this medium, our members are able to access our training packets and acquire information about the activities we organize. In order to increase frequency of member visits, the website's content includes various games to enhance the visitor's knowledge about beer, as well as product information and similar helpful information.



# Community Relations

## CONTRIBUTION TO LOCAL ECONOMY

Throughout the year, we organize many events towards our goal of increasing the Efes Club Professional members' quality of living. These events include trips, sporting events and concerts organized with member participation. As well as this, prizes are awarded to members who are successful in the games and contests we organize through mobile text messaging services. Thanks to Efes Club Professional, we can create awareness in the lives of members, and feel that we are by their sides during their difficult times as well as good times.



You can access more detailed information about the project from [www.efeskulup.com](http://www.efeskulup.com)

### OTC (Off Trade Chain)

With the aim to animate the retail sector and benefit the perception of a sales channel-based concept, we intended to establish a chain, and pilot work has been developed in areas open to development. This chain is called an Off Trade Chain (OTC). A chain of snack kiosks is being established throughout Turkey in regions and counties that are candidates for growth in terms of the GSMH per person. These chains offer availability opportunities for all firms with brands that offer customer satisfaction oriented service. The chains are managed by dealers and distributors in the relevant regions. Our goal as of the end of 2009 is 220 outlets. We maintain our project efforts continuously.





## CONTRIBUTION TO INCREASED FOREIGN TRADE AND TAX INCOME

The foreign trade volume in developing economies is of great importance. The growth of this volume plays a key role in the growth of the economy. However, in a developing economy, this growth's sustainability can only be ensured if the volume of export is greater than that of import. Consequently the balance of payments moves to a positive position and is able to erode the foreign debt stock. As the income obtained would be internalized into the local economy in the form of investments and expenditure, an extra resource apart from the country's own resources would be established. Therefore, when establishments that contribute to foreign trade activities have a positive effect on the progress of both the local and general economy, this is greater than the nominal value of trade volume. For this reason, companies that add to foreign trade activities will have contributed to the growth of the local economy, independent of numerical values.

At Anadolu Efes we carry out foreign sales activities as well. During the reporting period, our total beer and malt export amounted to about 52.3 million dollars, while our import activities were established at about 43.5 million dollars. Thanks to our foreign trade operations, additional foreign resources worth 8.8 million dollars were internalized into the country's economy.

Total Foreign (Trade Million \$)	2008	2009 (1 <sup>st</sup> Quarter)
Export	44,04	8,28
Import	34,09	9,42

Total Tax Paid (Million \$)	2008	2009 (1 <sup>st</sup> Quarter)
Corporate Tax	94,15	23,13
VAT	291,58	68,93
Excise Tax	969,24	221,67
Stoppage and other Taxes	71,64	11,55
<b>Total</b>	<b>1.426,6</b>	<b>325,3</b>

The alcoholic drinks industry is subject to various different tax types and percentages. Therefore our government obtains a significant amount of tax income every year as a result of our operations. We are aware that the tax that we pay provides a contribution to the advancement of the country's economy. During this reporting period, the total amount of tax that we paid was 1,751.9 million TL.

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# Community Relations

## SOCIAL INVESTMENTS

We are member of one of Turkey's oldest establishments, the Anadolu Group. Ever since our establishment, the recognition, credibility and value of our brands has always been top-level. We see the reason for this as being our society's acceptance of our corporate philosophy, of our way of doing business, of our activities and products, whether as Anadolu Efes or as the Anadolu Group of which we are a subsidiary. The appreciation shown by the people of this country encourages us to carry out more active projects in areas of social responsibility. For this reason, we aim to be able to respond at the highest level to the needs and expectations of the society that created us, and keep our social responsibility awareness continuously alive.

We define our company's most important mission as contributing to the elevation of society's standards of living. With this goal in mind, while we carry out important projects related to the matter of economic recovery, we are not content with this alone. For us, economic welfare only makes up one aspect of the quality of life. In developed societies, areas of social welfare such as health, education, culture, art and sports also carry great importance as indications of the quality of life. For this reason, we form the operational scope of our concept of corporate responsibility with not only with support for economic recovery but also the support we provide to projects that increase the level of social welfare in our society. We consider these activities of ours to be investments toward the improvement of the society we are in. This is because we know that companies can only grow in the climate of a developing economy that is healthy, educated and intellectually mature, comprising strong communities. A society devoid of culture, art, sports, health and education means a society deprived of the resources necessary for them to establish social sustainability.

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For over 30 years, we have sustained this philosophy and conceived projects that set an example to others. We consider this behavior to be an integral part of our modern management concept. We believe that we contribute to the increased awareness of the issues of corporate sponsorship and charity management in Turkey in particular, by having continually supported sports for 33 years, music and cinema for 21 years, theater for 17 years and archeology for 14 years.



We use a variety of implementation methods for our social investments. The type of issue and the implementation requirements determine which of these are to be used. We use donations to support the activities and projects of people and institutions that act on certain issues. When there is difficulty finding implementers or supporters in this country for certain issues, we take the initiative directly and undertake the entire financial and operational burden in order to give life to various projects and activities. Consequently we believe that while conceiving activities that benefit social life on the one hand, we are also reinforcing the bonds between Anadolu Efes brands and our society.

Every year we allocate a significant amount of financial resources to sponsorship, events and donations. For example, our main contract requires that we donate at least 2% of our profit before tax to the Anadolu Education and Social Aid Trust, to be used as required by social responsibility for education, health and social issues. Our most important goal for the future is to maintain and increase our efforts to be a role model for the issue of social investment, and to ensure that our participatory management concept reflects on field applications in this area as well, by making our employees actively participate in these operations.



# Community Relations

## SOCIAL INVESTMENTS

### SUPPORT FOR TOURISM



#### "We are Busy At Work for the Future of Turkish Tourism"

Research shows that a significant majority of this country's people consider unemployment to be one of the most important national problems. We believe that the solution is to create new job opportunities in every region and thus employ the potential workforce in these areas.

We have established that tourism is the branch of work with the highest potential for the improvement of economically underdeveloped regions and increasing their employment opportunities. It is clearly apparent that this country has a wealth of cultural, historical, social and natural treasures from a touristic aspect. We believe that touristic operations that would increase with the mobilization of these treasures, would play an extremely important part in the development of the local economy. This is because, together with its own growth, the tourism industry helps the growth of related industries.

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According to World Tourism Organization (WTO) projections, the industry due for the most rapid and steady growth over the next 40 years is the tourism industry. Steps taken by Turkey in the 80s has established a consistent growth in the area of tourism. While our country was visited by 12.8 million people in the year 2002, this figure reached 21.2 million in 2005, and today is around 25 million..





### We Work to Develop Turkey's Tourism Portfolio

Prior to our efforts to support the development of Turkish tourism, we carried out a Turkey Tourist Profile Survey with the input of foreign tourists coming to this country. We shaped our projects in light of the results of this research.

## TURIST PROFILI 2008



EFES Pilsen

At the end of the survey, we observed that the vast majority of visitors choosing to utilize their holidays in Turkey, visit our country with the aim of "sea, sand and sun" tourism. This country's previous touristic investments were centered on this, and the infrastructure formed was aimed at beach tourism. However, the demand for sustainable touristic operations known as eco-tourism has rapidly increased of recent years. Turkey has a high potential for this model, which supports the preservation of environmental and cultural heritage, and includes touristic practices that are intertwined with natural living and exercise. We have practically no region that does not host a natural, historical or cultural heritage. By utilizing this potential, we think that the sustainable tourism model is an extremely useful tool particularly for the advancement of regions that are backward in terms of socio-economic development.

For this reason, **we have been supporting archeological dig and restoration efforts in Assos Behramkale since 1995 and Canakkale Gulpinar since 1998, for their Anatolian cultural treasures to be revealed and conveyed**

**to future generations.** We added a new dimension to these projects of ours in the year 2007.

With our program carried out under the name of "The Future is in Tourism", comprising multi-dimensional projects, we started to support the widespread adoption of eco-tourism practices in Turkey and an increased proportion of these practices among total touristic income sources.



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# Community Relations

## SOCIAL INVESTMENTS

### Project for the Development of Eastern Anatolian Tourism (DATUR)

We initiated the DATUR Project in the year 2007, with the support and cooperation of the Turkish Republic Culture and Tourism Ministry, the United Nations Development Program (UNDP), relevant local authorities and academicians, with the aim of developing the touristic potential of the Coruh Valley, which is a leading example of natural beauty and rich cultural heritage in Eastern Anatolia, and thereby supporting Turkish tourism and the economic advancement of the region. The fundamental goals of the project are to develop an alternative to seaside tourism by establishing a sustainable tourism model, to support the development of Eastern Anatolia, to enable an increase in regional welfare by raising the local people's income level, and to draw the attention of the international tourism industry to the region's natural and historical riches.

We placed 3 strategic steps on our agenda as we planned the project's implementation. The first of these are the projects aimed toward the increased awareness of the regional population about the historical and cultural values of their area and its touristic potential, and the development of organizational capacity. The second strategic step of our project comprises efforts to develop regional products and services to draw touristic interest towards the region. Our final strategic step is the implementation of local and international marketing efforts in order to draw tourists to the region.

Our plan includes developing the scope of the DATUR Project as we continue it in the future, and to implement similar practices in our other regions.

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*Doğanın sunduğu  
büyük hazine*



*Tarihe tanıklık  
eden kültürel  
miras*



*Doğanın kalbinde  
alternatif sporlar*







### We create voluntary tourism ambassadors

Every Turk is a natural touristic ambassador of this country. At every opportunity, we describe our country to foreigners, and boast about our natural and historical heritage, our hospitality. However, this is not enough. We also have to ensure that the approximately 25 million tourists visiting our country every year become Turkey's voluntary touristic ambassadors. For this to happen, the first thing we should do is to ensure that our guests leave our country satisfied with the quality of the service they received. Because the most effective kind of advertising is the word-of-mouth sharing of experiences and impressions.

According to the results of the Turkey Tourist Profile Survey, 54.3% of tourists who visit our country are extremely satisfied with the service they received, and 35% are partially satisfied. 9% of our visitors, on the other hand, were dissatisfied with the service they received. To increase the satisfaction ratio, we need to increase the quality of the service we provide. The first condition of this is to ensure that employees are educated, cultured and aware. For this reason, we developed a new project in 2007, aiming to close the professional training gap in the tourism industry, which is one of this country's fundamental problems.

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#### Efes Pilsen Tourism Training

We began implementing the Efes Pilsen Tourism Training Project in the year 2007, with the cooperation of the Bogazici University Lifelong Education Center (BUYEM), aiming to develop the tourism industry by meeting the need for qualified staff, and provide employment opportunities.

Within the structure of the project, we first of all identified regions in need of tourism training and prioritized them. A training program was designed by academicians affiliated with BUYEM, aimed at establishing the basic occupational training and skills appropriate for a workforce to be cultivated for the field of tourism. Comprising chapters on sustainable tourism, interpersonal communication, greeting and hosting, food - drink organization, kitchen presentation, hygiene and sanitation, marketing and effective sales techniques, customer satisfaction, planning and logistics services, the training program also aims to provide detailed information about the touristic values of the region where the participants are located. BUYEM presents participants who successfully complete the training program with an Edexcel Tourism Certificate which is internationally recognized, in EU countries in particular. Since the year 2007, over 2000 participants merited this certificate.

Our training marathon that began in the year 2007 in Erzurum, Mardin, Adiyaman, Urfa (Halfeti) and Antakya, continued in 2008 with training provided in Erzincan (Kemaliye), Rize, Trabzon, Gaziantep and Mersin. In 2009, training locations have been planned for Antalya, Adana, Tokat, Sivas, Kars and Urfa.



# Community Relations

## SOCIAL INVESTMENTS

### The Tourism Ambassadors at Work

Since the year 2007, we have been supporting the tourism industry's development and its acquisition of qualified employees with our "Efes Pilsen Tourism Training Project". We aim to support these efforts by giving birth to a new project called "the tourism ambassadors at work" in 2009.

The project's fundamental goals are as follows;

- To establish the adoption of a regional sustainable tourism understanding by supporting the local forming of unions by participants in the "Tourism Ambassadors Certificate program" training
- To establish the adoption of an observational role by the local people and local administration in their tourism projects,
- To establish the adoption of a sustainable tourism understanding by NGOs and the local population in general.

With a project that we plan to initiate in the second half of 2009, we aim to help the forming of unions and societies at a local level, based on a sustainable tourism understanding by the participants who successfully complete the "Tourism Ambassadors Certificate program".

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You may reach detailed information about all of our tourism projects from the site, [www.gelecekturizmde.com](http://www.gelecekturizmde.com)



# 40. YILINDA BENİM İÇİN EFES...



Doğu Anadolu Turizm Geliştirme Projesi'nin, Efes Pilsen Turizm Eğitimleri'nin, Assos ve Gülpınar Arkeolojik Kazılarının arkasındaki isim Efes. Bizim biramız, bizim markamız Efes.



[www.benimicines.com](http://www.benimicines.com)



**KISACASI, HAYAT 40 YILDIR BU KAPAĞIN ALTINDA...**



# Community Relations

## SOCIAL INVESTMENTS

### SPORTS

#### Supporting Sports

Our efforts emphasize the importance of sports in the raising of healthy generations. With our support and the investments we have been making in the sports arena for over 37 years, we believe that we have been pioneers in the advancement of Turkish sports and its attainment of worldwide success. With our activities in this field, we aim to revive sport as a lifestyle, and help it to appeal to a broader audience.



#### SPOR KULÜBÜ

#### Efes Pilsen Sports Club

Established in 1976 with the aim of advancing the country's sports, and with basketball achievements as yet unparalleled by any Turkish team, the Efes Pilsen Sports Club has won 12 championship cups, and is the only team in the Turkish Premier Basketball League to have succeeded this often. Moreover, with 8 Turkey Cups and 7 Presidential Cups, our team won the right to the "Champion of Champions" title. The first and only Turkish team to have placed the European Cup in their museum, they are also the first club to have brought the European championship to Turkey and succeeded in being the first and only Turkish team to participate in the Euroleague's Final Four.

The Efes Pilsen Sports Club is accepted as being one of Turkey's leaders in basketball. With our achievements, we contribute to the new generation's interest in basketball and the training of young sportsmen.

You can access more detailed information about the Efes Pilsen Sports Club from [www.efesbasket.org](http://www.efesbasket.org).







# Community Relations

## SOCIAL INVESTMENTS

As well as basketball, we continue to set an example to other companies with the support that we have given to football for years. **We have been the main sponsor of the Turkish National Football Teams since the year 2002. As of February 2009, we have renewed our sponsorship contract and extended it for another 4 years. As well as the Turkish National Football Teams, we are the official sponsor of the Besiktas, Fenerbahce and Galatasaray clubs, and support over 10 Anatolian clubs.**

The sponsorship contract that we signed with the Turkey Football Federation as of February 2009, as well as giving our support to the Turkish National Football Team, is important to us for another reason. With this contract that we signed, we will be supporting the Futsal League, which is for indoor football, for 4 seasons. We believe that "Futsal" has a great potential in Turkey. The sport that attracts the most attention in this country is football, but the regulatory practices of football demand significant infrastructure and investment. On the other hand, environments meeting the technical requirements of indoor football are much more easily attainable. This means the opportunity for many more people to play sports. Moreover, "Futsal" is dynamic to watch and visually very enjoyable. We believe that with this feature of "Futsal", its players and fan base will quickly increase in this country. To enable this, we organize university tours to promote "Futsal".

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You can access more detailed information about the Efes Pilsen Futsal League at [www.efespilsenfutsal.com](http://www.efespilsenfutsal.com)



For seven years since the year 2002, we have regularly organized the "Efes Pilsen Cup" football tournament. Organized in Antalya every year during the football pre-season, it has become a traditional football tournament for Europe's larger teams. Thanks to this tournament, teams find the chance to test the success of their pre-season preparatory training. As the Efes Pilsen Cup offers this chance to teams with a quality event, leading clubs worldwide participate in this tournament. For this reason, teams spend their pre-season period in Antalya, which in turn contributes significantly to the popularity of sport in our country and to Antalya's tourism income.

We are also working on projects for our country's representation on sport's international platform in an organizationally and administratively effective way, and for Turkish athletes to achieve greater success in international contests. We support the "Olympic Movement" and the Turkey National Olympics Committee developed to this aim as their official sponsor since the year 2005. As an extension of this, we also supported the Turkish Olympic Team that participated in the 2008 Peking Olympic Games in the year 2008.



# 40. YILINDA BENİM İÇİN EFES...



- Türk Millî Futbol Takımları Ana Sponsoru • Beşiktaş, Fenerbahçe, Galatasaray Kulüpleri Resmi Sponsoru • Onlarca Anadolu kulübünün destekçisi
- Efes Pilsen Basketbol Takımı • Efes ile İlk Adım Basketbol Okulları
- Euroleague Resmi Sponsorluğu • Efes Pilsen Futsal Ligi ve Efes Pilsen World Cup'ın arkasındaki isim Efes...



[www.benimicines.com](http://www.benimicines.com)



**KISACASI, HAYAT 40 YILDIR BU KAPAĞIN ALTINDA...**



# 40. YILINDA BENİM İÇİN EFES...



Türk sinemasının, Türk tiyatrosunun, müzik festivallerinin ve onlarca kültürel etkinliğin arkasındaki isim Efes. Bizim biramız, bizim markamız Efes.



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**KISACASI, HAYAT 40 YILDIR BU KAPAĞIN ALTINDA...**





## ART AND CULTURE

### We Undertake a Leading Role in the Support of Art and Cultural Activities

At Anadolu Efes we make an effort to show that we stand behind our community and our consumers in every area of life, along with all our brands. It is extremely important for us to be together with our consumers in all life's enjoyable moments, with the donations and sponsorships we make to various art and culture events. We consider it a responsibility to present the public with examples of various arts events in Turkey and the rest of the world, and to exhibit a leading stance on this issue. We believe that in this way, we are extending the economic support that we give this country to the social sphere as well, with art and culture events that embrace all social strata. With our pioneering status in sponsorship, our goal is to contribute to the development of young people and the enrichment of their lives, by supporting a broad range of artistic and cultural values such as music, cinema, theater and archeology.

## MUSIC

### We Have Been Organizing Different Kinds of Musical Events for 21 Years

We believe that works of art are the fruits that nourish our souls. For this reason, we try to contribute to many different forms of art. However, we believe that of all the artistic disciplines we support, it is music that unites us with the public to the greatest extent. With the events that we organize, in particular, we are able to establish direct contact with our consumer audience by joining them in the same environment. For this reason, we maintain our support for music without pause.

#### Efes Pilsen Blues Festival

We have been organizing the Efes Pilsen Blues Festival regularly for almost 20 years. The fact that the word "blues" in Turkey is primarily associated with the Efes Pilsen Blues Festival, and that thousands of people participate in the festival every year, shows how right we were to invest in this area. This interest, which increases every year, has motivated us to enlarge and develop our plans of operation. Starting out in Turkey with the aim of introducing the blues musical culture, the Efes Pilsen Blues Festival has united the audience with legendary names in blues music since its very first years, and will continue to do so.

First starting out in Istanbul, the festival grows every year to currently encompass 20 cities across Turkey, including Istanbul, Ankara, Izmir, Bursa, Trabzon, Konya, Eskisehir, Antalya, and Adana, uniting 230 blues musicians at 23 separate concerts with approximately 35,000 music lovers. With 309 concerts to date, covering approximately 100 thousand kilometers, and hosting 365 thousand music-loving guests, our festival also has the honor of being the longest-lasting festival that has toured the most cities.



You can access more detailed information about the "Efes Pilsen Blues Festival" from [www.efesblues.com](http://www.efesblues.com)

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# Community Relations

## SOCIAL INVESTMENTS

### The Efes Pilsen One Love Festival

Another of our projects on the musical platform is the Efes Pilsen One Love Festival, which we have organized regularly since 2002, and is known as the first major festival of the summer. Organized for the sake of enriching social life, which is a significant indication of advancement, it creates an important chance for us to meet with our consumers. Apart from this, one of the most important benefits of the festival is its contribution to Istanbul's touristic promotion. As well as the historical and cultural value of touristic cities, entertainment attracts tourists too. With world-famous musicians meeting music-lovers at this quality event, we believe that the Efes Pilsen One Love Festival undertakes a vital role in this matter.

Over time, we made an effort to develop the festival's concept, as well. Originally designed for the first few years in the form of concert events, the festival today offers participants an environment of unlimited fun, starting in the early hours of the day and continuing throughout the night, with a number of activities and concerts. Approximately 18,000 people participate in the Efes Pilsen One Love Festival every year, which lasts for 2 days.



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You can access detailed information about the "Efes Pilsen One Love Festival" on [www.efespilsenonelove.com](http://www.efespilsenonelove.com)

### Miller Music Factory

Miller is the originator of many projects in their capacity as the brand for music, fun and innovation. One of the most significant of these is the "Miller Music Factory" music contest, which is to be organized for the 6th time in 2009. Considered to be a turning-point in the career of amateur musicians in Turkey, and aimed at identifying musical genius, discovering young talent and supporting the alternative music culture, the Miller Music Factory contest offers a unique opportunity for fresh talent with belief in their own abilities but unable to find a platform to display their talent.

You can access more detailed information about the "Miller Music Factory" contest on [www.millermusicworld.com](http://www.millermusicworld.com)

### Rock'n'Dark Music Contest

With our Efes Dark brand, our target is the development of rock and alternative music in this country. To this aim, we are supporting the emergence of young talent from all over Turkey with the Rock'n'Dark music contest, first organized in 2006 with a response of huge interest.

Various prizes are presented to those who are successful in the contest, which is organized in 9 different regions from January to May and limited to the participation of amateur musicians alone. Approximately 5000 people participate in the activities every year.

You can access more detailed information about the "Rock'n'Dark Music Contest" on [www.rockndark.com](http://www.rockndark.com)



### Miller Freshival

Due to be staged by Miller for the first time in 2009, Turkey's "freshest" music festival, Miller Freshival, is a festival that introduces music lovers to the latest and secret discoveries of the music world. The freshest of local and international bands, just starting to make a name for themselves, feature on the stage at Miller Freshival. The festival differs from other festivals in Turkey not only in terms of its music but also its concept, décor and the fresh touches provided by various other art disciplines, parallel to the music.

You can access more detailed information about Miller Freshival on [www.millerfreshival.com](http://www.millerfreshival.com)

## CİNEMA

### We have been an exemplary supporter of Turkish Cinema since 1988

After a magnificent era, Turkish cinema entered a period of stagnation during the 80s. As productions could not even meet their own costs, producers reached the stage when they were unable to produce anything. We thought that the state that Turkish cinema was in did not originate from a waning of artistic or audience potential. In our opinion, the problem was the lack of production due to insufficient financial resources, and the inability of those productions that were attempted with limited resources to attract the audience's interest due to technical impossibilities. In our capacity as a company that has shown an attitude of support for art and culture ever since our establishment, we thought that we needed to take the initiative to change the situation, and we decided to provide financial resources to Turkish cinema productions at a time when Turkish cinema was struggling to survive.

For us, sponsorship of Turkish cinema is a social issue rather than just a promotional vehicle, and it was an effort to set an example to other companies to increase this support. Toward this aim, Efes Pilsen's cinema sponsorship adventure, which began with Reha Erdem's award-winning movie "A Ay" in 1988, continued with Yusuf Kurcenli's "Cozumeler", Irfan Tosun's "Kis Kulesi Asiklari", and

Efes Pilsen's 10 Movie - 10 Producers project, carried out jointly with the Turkish Cinema Trust, continued with "Yercekimli Asklar" and "Ask Uzerine Soylenmemis Hersey". Over the past 21 years we have supported the production of dozens of Turkish movie.

As well as our continued and increasing support for the "International Istanbul Film Festival", which we have sponsored for 20 years, we have also presented the "Efes Pilsen Special Prize" within the festival's structure since 1997, in memory of the famous poet, writer and movie critic Onat Kutlar. With this prize, presented to the producer of the film selected by the International Fripresci Jury in the National Contest section of the festival, for use in the production of his/her next movie, we aim to contribute to the productivity of young producers. Many local productions, sponsored by Efes pilsen and which have won 76 different awards at festivals both locally and internationally, are a source of pride both for Turkish cinema and for Efes Pilsen today.



You can access detailed information about our support for Turkish cinema from the "Activities" section at [www.efeskeyfi.com](http://www.efeskeyfi.com)

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# Community Relations

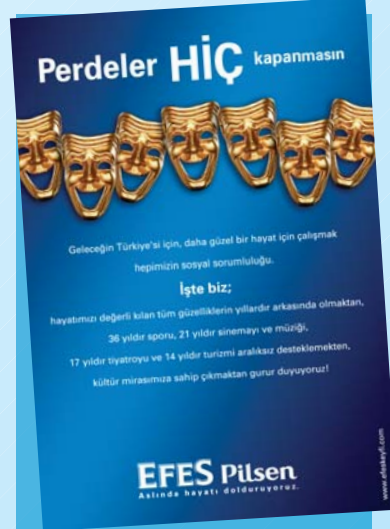
## SOCIAL INVESTMENTS

### THEATER

#### Efes Pilsen has been a "Lifelong Sponsor" of Turkish theater since 1992

Toward our mission of contributing to raising the living standards of the community, we continue to create value with our support for the theater. We have been carrying out our sponsorship activities continuously since 1992 with the aim to support the survival of Turkish theater, and to help them to stage and promote plays. Within our concept of being Turkish theater's "lifelong sponsor", we support a number of theaters on matters like press releases, posters and brochures for plays staged throughout the entire season, as well as the organization of gala nights.

You can access detailed information about our support for the Turkish theater from the "Activities" section at [www.efeskeyfi.com](http://www.efeskeyfi.com)



### ARCHEOLOGY

#### We have been excavating the Anatolian Cultural Heritage since 1995

Another area in the field of art and culture where we believe that we are contributing to social advancement is archeology. At Anadolu Efes, we feel responsible for the excavation of Anatolian cultural treasures and their access by future generations. Aiming to develop the Turkish cultural heritage and convey it to future generations by giving it permanency, we have supported excavation and restoration work at Assos Behramkale since 1995, and at Canakkale's Gulpinar resort since 1998.

As a result of our altruistic efforts to rescue and bring to light our historical treasures that face extinction, we were presented with the TUREB Cultural Sustainability award. To hold this award, considered to be "the Oscar of tourism", has reinforced our pioneering role in the issue of creating cultural value, and is a source of great pride for us

You can access detailed information about our support for archeological work in the "Activities" section at [www.efeskeyfi.com](http://www.efeskeyfi.com)



## EDUCATION AND HEALTH

### We contribute to the advancement of educational and health services

Enabling the development of educational and health services is a priority issue in this country. In accordance with our understanding of support for initiatives that benefit living, we give importance to our social investments in these issues as well. However, rather than investing directly in this area, we provide financial support to the activities of the Anatolian Education and Social Aid Trust, an affiliate of Anadolu Efes established in 1979.

With the support we have given the operations of the Anadolu Trust to date, we are happy to have contributed to this country's acquisition of 43 lasting works in the areas of education, health and social fields. We provide free scholarship opportunities to approximately 750 students every year. Within the scope of our project to support computerized education, we provide support to schools' campaigns for the acquisition of computers.

The most advanced and comprehensive project carried out to date through the Anadolu Education and Social Aid trust, the Anadolu Health Center located within the Anadolu Health Village, started functioning as a general-purpose hospital in Gebze in the year 2005. The Anadolu Health Center was established within a strategic partnership with John Hopkins Medicine, voted the best hospital in the USA every year for the past 16 years. The health center encompasses all branches including pediatrics, dermatology, genetics, gynecology, obstetrics, cardiology and oncology.

A pioneering initiative set to alter the definition of the service concept in the field of health, all income generated by the Anadolu Health Center is utilized for development of the project, and meeting educational and research expenses. Moreover, at least 10% of patients treated at the Anadolu Health Center are given free treatment with no charge for services. As well as this, free health scans, patient education programs, first aid course and preventative medicine seminars and programs are organized with the aim of informing the public.

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# Community Relations

## SOCIAL INVESTMENTS

### Hayatı Doldur Youth Club

At the basis of this country's human resources of tomorrow lie the university students of today. For this reason, we carry out projects that increase young people's quality of living and contribute to their individual development. For the effective implementation of our efforts, we believe that we need to be in closer communication with young people and understand their world better. For this reason in the year 2008 we established the Hayatı Doldur Youth Club, a social platform aimed at university youth. Within the structure of this project, we established brand embassies at 23 campuses of 22 universities, in 11 counties across Turkey. The club also has its own website. This website promotes all activities carried out by the Anadolu Efes brands and enables student participation.

As well as enriching the social lives of young people, The Hayatı Doldur Youth Club aims to contribute to their individual and professional advancement. For this reason, educational activities are included in the club's projects, aimed at the personal and career development of young people. For example, as of 2009, "Mini MBA" courses are planned, aimed at developing the management skills of university students. We plan to implement the project in the form of 2-day courses, throughout 14 universities. By the end of 2009 we aim to have completed "mini MBA" course at 5 universities.

You can access detailed information about the Full Life Youth Club and its activities at [www.hayatidoldur.com](http://www.hayatidoldur.com)

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[www.hayatidoldur.com](http://www.hayatidoldur.com)



# 40. YILINDA BENİM İÇİN EFES...



Türkiye'deki 5 bira, 2 malt ve 1 şerbetçiotu, yurt dışındaki 11 bira ve 4 malt fabrikasıyla Avrupa'nın en büyük beşinci biracısı Efes. Toplam 7.000'i aşkın çalışanı ve 9.000 Türk çiftçi ailesine sağladığı dolaylı istihdam ile en çok vergi veren ilk 10 şirket arasındaki isim Efes. Bizim biramız, bizim markamız Efes.



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**KISACASI, HAYAT 40 YILDIR BU KAPAĞIN ALTINDA...**



# GRI Table



GRI INDICATORS	REFERENCE	PAGE	NOTES	RESPONSE
<b>PROFILE INDICATORS</b>				
<b>Strategy and Analysis</b>				
1.1	Letter from General Manager	12-13		Full
<b>Organizational Profile</b>				
2.1	About the Report	7		Full
2.2	Our Products	54		Full
2.3	Corporate Web Site		<a href="http://tr.anadoluefes.com/anadoluefes/detail_v2.aspx?SectionID=cKEuUJY2Eg8%2bKgPaFbRfrg%3d%3d&amp;ContentId=rbHe8zKvDTG7TLSCVJs5Q%3d%3d">http://tr.anadoluefes.com/anadoluefes/detail_v2.aspx?SectionID=cKEuUJY2Eg8%2bKgPaFbRfrg%3d%3d&amp;ContentId=rbHe8zKvDTG7TLSCVJs5Q%3d%3d</a>	Full
2.4	Identity of the Report	112		Full
2.5	About Anadolu Efes	16	<a href="http://www.anadoluefes.com/anadoluefes/detail_v2.aspx?SectionID=5UDmtGV3dcbgkLHU8blsQ%3d%3d&amp;ContentId=Rfqw9FTbjAeA%2FLpELI0ReQ%3d%3d">http://www.anadoluefes.com/anadoluefes/detail_v2.aspx?SectionID=5UDmtGV3dcbgkLHU8blsQ%3d%3d&amp;ContentId=Rfqw9FTbjAeA%2FLpELI0ReQ%3d%3d</a>	Full
2.6	About Anadolu Efes	20		Full
2.7	Corporate Web Site		<a href="http://www.anadoluefes.com/anadoluefes/default.aspx?SectionID=KybOp%2bk%2F%2fnB8LAbz2wLjg%3d%3d&amp;ContentId=sPynVxCeKy8E%2bGwgDQ7ybA%3d%3d">http://www.anadoluefes.com/anadoluefes/default.aspx?SectionID=KybOp%2bk%2F%2fnB8LAbz2wLjg%3d%3d&amp;ContentId=sPynVxCeKy8E%2bGwgDQ7ybA%3d%3d</a>	Full
2.8	Anadolu Efes, Corporate Web Site	21	<a href="http://www.anadoluefes.com/hissedarlar_yatirimci_iliskileri/anasayfa.aspx?SectionID=iFsr2NZV8%2fo5GFLT%2fFJQ%3d%3d&amp;ContentId=hScJcYe8%2fptvNFEYc1E4Q%3d%3d">http://www.anadoluefes.com/hissedarlar_yatirimci_iliskileri/anasayfa.aspx?SectionID=iFsr2NZV8%2fo5GFLT%2fFJQ%3d%3d&amp;ContentId=hScJcYe8%2fptvNFEYc1E4Q%3d%3d</a>	Full
2.9	GRI Table	110	No significant changes occurred during the reporting period regarding the organizational structure	Full
2.10	Corporate Governance, Our Products, Archeology	27, 55, 106		Full
<b>Report Parameters</b>				
<b>Report Profile</b>				
3.1	About the Report	7		Full
3.2	GRI Table	110	Anadolu Efes 2008 Corporate Social Responsibility Report is the first CSR report published by the company	Full
3.3	About the Report	7	CSR Reports will be published annually	Full
3.4	Identity of the Report	112		Full
<b>Report Scope and Boundary</b>				
3.5	About the Report	7		Full
3.6	Our Reporting Scope	9		Full
3.7	Our Reporting Scope	9		Full
3.8	GRI Table	110	Report excludes the CSR performance of subsidiaries	Full
3.10	GRI Table	110	Anadolu Efes 2008 Corporate Social Responsibility Report is the first CSR report published by the company	Full
3.11	GRI Table	110	Anadolu Efes 2008 Corporate Social Responsibility Report is the first CSR report published by the company	Full
<b>GRI Content Index</b>				
3.12	GRI Table	110		Full
<b>Governance, Commitments and Engagement</b>				
<b>Governance</b>				
4.1	Anadolu Efes Annual Report 2008	22, 86-89	<a href="http://www.anadoluefes.com/hissedarlar_yatirimci_iliskileri/detail.aspx?SectionID=%2bbEtGFhQ2%2fFcsG0%2fe56VSA%3d%3d&amp;ContentId=5UDmtGV3dcbgkLHU8blsQ%3d%3d">http://www.anadoluefes.com/hissedarlar_yatirimci_iliskileri/detail.aspx?SectionID=%2bbEtGFhQ2%2fFcsG0%2fe56VSA%3d%3d&amp;ContentId=5UDmtGV3dcbgkLHU8blsQ%3d%3d</a>	Full
4.2	Anadolu Efes Annual Report 2008	86-89	<a href="http://www.anadoluefes.com/hissedarlar_yatirimci_iliskileri/detail.aspx?SectionID=%2bbEtGFhQ2%2fFcsG0%2fe56VSA%3d%3d&amp;ContentId=5UDmtGV3dcbgkLHU8blsQ%3d%3d">http://www.anadoluefes.com/hissedarlar_yatirimci_iliskileri/detail.aspx?SectionID=%2bbEtGFhQ2%2fFcsG0%2fe56VSA%3d%3d&amp;ContentId=5UDmtGV3dcbgkLHU8blsQ%3d%3d</a>	Full
4.3	Anadolu Efes Annual Report 2008	86-89	<a href="http://www.anadoluefes.com/hissedarlar_yatirimci_iliskileri/detail.aspx?SectionID=%2bbEtGFhQ2%2fFcsG0%2fe56VSA%3d%3d&amp;ContentId=5UDmtGV3dcbgkLHU8blsQ%3d%3d">http://www.anadoluefes.com/hissedarlar_yatirimci_iliskileri/detail.aspx?SectionID=%2bbEtGFhQ2%2fFcsG0%2fe56VSA%3d%3d&amp;ContentId=5UDmtGV3dcbgkLHU8blsQ%3d%3d</a>	Full
4.4	Anadolu Efes Annual Report 2008	84	<a href="http://www.anadoluefes.com/hissedarlar_yatirimci_iliskileri/detail.aspx?SectionID=%2bbEtGFhQ2%2fFcsG0%2fe56VSA%3d%3d&amp;ContentId=5UDmtGV3dcbgkLHU8blsQ%3d%3d">http://www.anadoluefes.com/hissedarlar_yatirimci_iliskileri/detail.aspx?SectionID=%2bbEtGFhQ2%2fFcsG0%2fe56VSA%3d%3d&amp;ContentId=5UDmtGV3dcbgkLHU8blsQ%3d%3d</a>	Full
<b>Stakeholder Engagement</b>				
4.14	Stakeholder Engagement	29		Full
4.15	Stakeholder Engagement	29		Full





GRI INDICATORS	REFERENCE	PAGE	NOTES	RESPONSE
<b>PERFORMANCE INDICATORS</b>				
<b>Economic Performance Indicators</b>				
EC1	Consolidated Financial Statements as of December 31, 2008 Together with Report of Independent Auditors	21, 114-118	<a href="http://www.anadoluefes.com/images/pdf/AEFES-Kons31122008SPK_ENG_FINAL.pdf">http://www.anadoluefes.com/images/pdf/AEFES-Kons31122008SPK_ENG_FINAL.pdf</a>	Partial
EC2	Equivalent Energy Use, Support for Malt Barley Production	64, 79		Partial
EC3	Consolidated Financial Statements as of December 31, 2008 Together with Report of Independent Auditors	156	<a href="http://www.anadoluefes.com/images/pdf/AEFES-Kons31122008SPK_ENG_FINAL.pdf">http://www.anadoluefes.com/images/pdf/AEFES-Kons31122008SPK_ENG_FINAL.pdf</a>	Full
EC4	Capital and Partnership Structure	18	Government is not present in the ownership structure of the company	Partial
EC6	Contribution to Local Economy	76-82	Local procurement means purchasing from Turkey, no international payments are done. Total amount excludes concentrate purchase.	Partial
EC7	Employment for Thousands of People	82-83		Partial
EC8	Contribution to Local Economy, Social Investments	92-94, 95-96, 107		Full
EC9	Contribution to Local Economy	80, 82, 84, 87, 94		Full
<b>Environmental Performance Indicators</b>				
EN3	Energy Management	64		Full
EN5	Equivalent Energy Use	64-65		Partial
EN8	Water Management	67		Partial
EN16	Carbon Footprint	65		Partial
EN18	Carbon Footprint	65		Partial
EN21	Waste Water	67		Full
EN22	Waste Management	71-72		Full
EN26	Environmental Performance	69-70		Full
EN28			There have been no fines paid within the reporting period due to inappropriate actions involving the environment.	Full
<b>Labor Practices and Decent Work Performance Indicators</b>				
LA1	Employee rights	33		Full
LA2	Hiring	44		Full
LA4	The Right to Unionize	42	All the unionized workers are covered by collective bargaining agreements	Full
LA5	Minimum Warning Period	41		Full
LA7	The Right to Health and Safety at Work	46	Data on contractors are excluded from the performance in 2008 reporting	Full
LA8	The Right to Health and Safety at Work	46		Partial
LA10	Trainings	37		Full
LA12	Performance management	33-34		Full
LA13	Hiring	44		Partial
LA14	Social Rights	38	Ratio of basic salary of men to women is 1 since there is no gender-based wage discrimination.	Full
<b>Human Rights Performance Indicators</b>				
HR2	Logistics	59		Partial
HR4	Equal Opportunity Rights	43	Anadolu Efes did not receive any complaint from employees about discrimination in particular during this reporting period and there are no lawsuits filed against Anadolu Efes with regards to this matter.	Full
HR6	Our Human Rights Understanding, Logistics	32, 59		Full
HR7	Our Human Rights Understanding, Logistics	32, 59		Partial
<b>Society Performance Indicators</b>				
S02	Risk Management	30-31		Partial
S03	Trainings	36-37		Partial
S04	Risk Management	30-31		Partial
S05			Anadolu Efes does not make donations or contributions to any political party and does not carry out lobbying activities	Full
S08			No significant fines are paid for non-compliance with laws and regulations within the reporting period	Full
<b>Product Responsibility Performance Indicators</b>				
PR3	Responsible Marketing, Anadolu Efes Environmental Principles	49, 62	All our products meet the required quality and safety standards.	Full
PR6	Responsible Marketing	48-49		Full
PR7	Responsible Advertisements	49		Full
PR9			No significant fines are paid for non-compliance within the reporting period regarding the provision and use of products and services.	Full

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## Legal Disclaimer

The Sustainability Report (the Report) has been prepared by Anadolu Efes Brewery and Malt Industry A.S. ("Anadolu Efes") within the principles of GRI (Global Reporting Initiative).

All information and opinions included in the report that are not of a fully complete nature have been provided by Anadolu Efes and have not been approved by an independent source.

This report has been prepared solely for informative purposes and does not aim to form the basis for any investment decision. No information in this report constitutes a proposal or part of a proposal relating to the sale of Anadolu Efes shares, or an invitation to this kind of sales process, and the publishing of this report does not mean that a legal relationship of this kind has been established.

All featured information and related documents are believed to be accurate at the time of this report's preparation, and all information has been provided in good faith and relies on trustworthy sources. However, Anadolu Efes does not make any kind of declaration, guarantee or promise in relation to this information. Accordingly, no company belonging to Anadolu Efes, nor their Board Committee members, advisors or employees are responsible for any loss or damage incurred directly or indirectly by a person as a result of any information or communication provided within this report, or any information based on or not included in this report.

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