

**ANADOLU  
EFES**

**ANADOLU EFES  
Sustainability Report  
2017**



**ANADOLU  
EFES**

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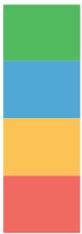
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## About the Report

Since 2010, Anadolu Efes Biracılık ve Malt Sanayii A.Ş. has been providing corporate governance, and environment and social performance information through its sustainability reports. We continue to transparently present our stakeholders with our strategies, objectives, performance and developments in this year's sustainability report.

This report has been prepared according to the GRI Standards: Core option. The information provided in the report involves the beer operations performed between Turkey, Russia, Kazakhstan, Georgia and Moldova in the January 1–December 31, 2017 period.

The report also encompasses the developments as part of the United Nations Global Compact (UNGC) and the UNGC CEO Water Mandate, both of which we are a signatory.



Anadolu Efes affiliates are not included in the report. The sustainability report for the affiliate Coca-Cola İçecek A.Ş. is available at the sustainability section of the [www.cci.com.tr](http://www.cci.com.tr) website.

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## Dear Stakeholders,

We have published the eighth Sustainability Report to share transparently the positive impact we have made on the environment, community, people and the value chain.

We owe this success to our sustainable business model, which prioritizes people and nature, supports socio-economic development and aims to create a positive impact for all our stakeholders.

This year, we have conducted a wide-scale stakeholder analysis and accelerated our sustainability efforts. We have updated the Anadolu Efes Positive Impact Plan, which forms the basis of our sustainability strategy in the light of global and sector trends. Accordingly, we have published the eighth Sustainability Report to share transparently the positive impact we have made on the environment, community, people and the value chain. We would like to make new accomplishments by sustaining our leading role in this field. This year, we have responded to the Carbon Disclosure Project (CDP) Climate Program and have begun sharing our efforts to combat climate change with our stakeholders.



We're influencing a vast ecosystem by reaching more than 300 million consumers, thousands of employees and partners in more than 70 countries. In this direction, we are ensuring that our efforts comply with and contribute to the Sustainable Development Goals. We took part in global initiatives as a signatory of the UN Global Compact, the UNGC CEO Water Mandate, and the Women Empowerment Principles.

In 2017, we identified our material issues with a comprehensive stakeholder analysis. As we improve our operations in line with our positive impact goals, we are contributing to the development of thousands of suppliers, dealers, and distributors, whom we are cooperating with in compliance with the Anadolu Efes' labor standards. Thanks to our agricultural R&D program, we have developed our own species of malt barley and hops, which are the primary ingredients of beer. We contributed to the fight against climate change by developing agricultural

products that require less water. We also support sustainable development in agriculture and the betterment of farmers' welfare. As part of the Contract Purchase Model, we cooperate with local farmers to ensure planned production and domestic supply of these products.

With these efforts, we made significant progresses in 2017. We achieved a 15 percent reduction\* in energy consumption per product in beer production. Our total greenhouse gas emissions decreased by nine percent\*. We decreased our water consumption by 38 percent and our waste water discharge by 41 percent\*.

Additionally, we obtained 72 percent of our raw material from contracted farmers. We provided 1,600 total hours of training to 200 manufacturers as part of the Contract Purchase Model. We trained 97 percent of our dealers and distributors, providing two hours of training per person and 548 persons/hours in total.

We consider social investments an indispensable part of our sustainable business model. We aspire to create a local development model with a focus on tourism. We will provide funding to three tourism projects each year through the "The Future is in Tourism" project, an initiative ran in conjunction with the Republic of Turkey Ministry of Culture and Tourism and the United Nations Development Program. During the reporting period, we supported

the Four Seasons of Foça (Foça, Izmir), Birds Calling You (Buldan, Denizli), and an History Break: On the Lycian Way (Demre, Antalya) projects.

We are committed to achieving our primary sustainability goals in line with the Anadolu Efes Positive Impact Plan. I would like to thank our valuable colleagues, business partners, distributors and dealers, as well as our customers and all our stakeholders who contributed to the sustainable efforts of Anadolu Efes. We are proud to share the details of their contributions in this report.

Kind regards,

### **GAVIN HUDSON**

Beer Group President and  
Anadolu Efes CEO



\* In comparison to 2008

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## About Anadolu Efes

We operate in 6 countries and export to more than 70 countries.

As part of the Anadolu Group, we are the fifth-largest brewer in Europe in terms of volume and the fifteenth-largest brewer in the world. We set out in 1969 with just two breweries: one in Istanbul and one in Izmir. Today, we lead the industry with three breweries, two malt facilities and one hop processing facility in Turkey. We operate as a major regional player and export to more than 70 countries with 14 breweries, five malt production facilities, one hop processing facility and one preform production facilities in six countries. Our beer brands reach over 300 million people.

We entered into a strategic partnership with SABMiller Plc (“SABMiller”) with an eye to expand our area of influence in the region. In 2016, Anheuser-Busch Inbev (“AB InBev”), the world’s biggest brewer, acquired SAB Miller, distributing 24 percent of its Anadolu Efes shares to AB InBev.

We take pioneering and innovative steps to advance the sound corporate competencies we have built, and honor our vision with a dynamic and modern organization.

### Turkey

Market Leader

3	Brewery
7,6 mhl	Beer Production Capacity
2	Malt Production Facility
118	Thousand Ton Beer Production Capacity
1	Hop Processing Facility
11	Beer Consumption per Person in Liters
61%*	Market Share

### Kazakhstan

Market Leader

2	Brewery
2,5 mhl	Beer Production Capacity
29	Beer Consumption per Person in Liters
54%*	Market Share

\* Nielsen

\*\* Gamma Retail Audit

\*\*\* Company estimate

### Russia Market Position: Second

- 6 Brewery
- 20 mhl Beer Production Capacity
- 3 Malt Production Facility
- 110 Thousand Ton Malt Production Capacity
- 1 Preform Production Facility
- 52 Beer Consumption per Person in Liters
- 15%\* Market Share

### Ukraine Market Position: Second

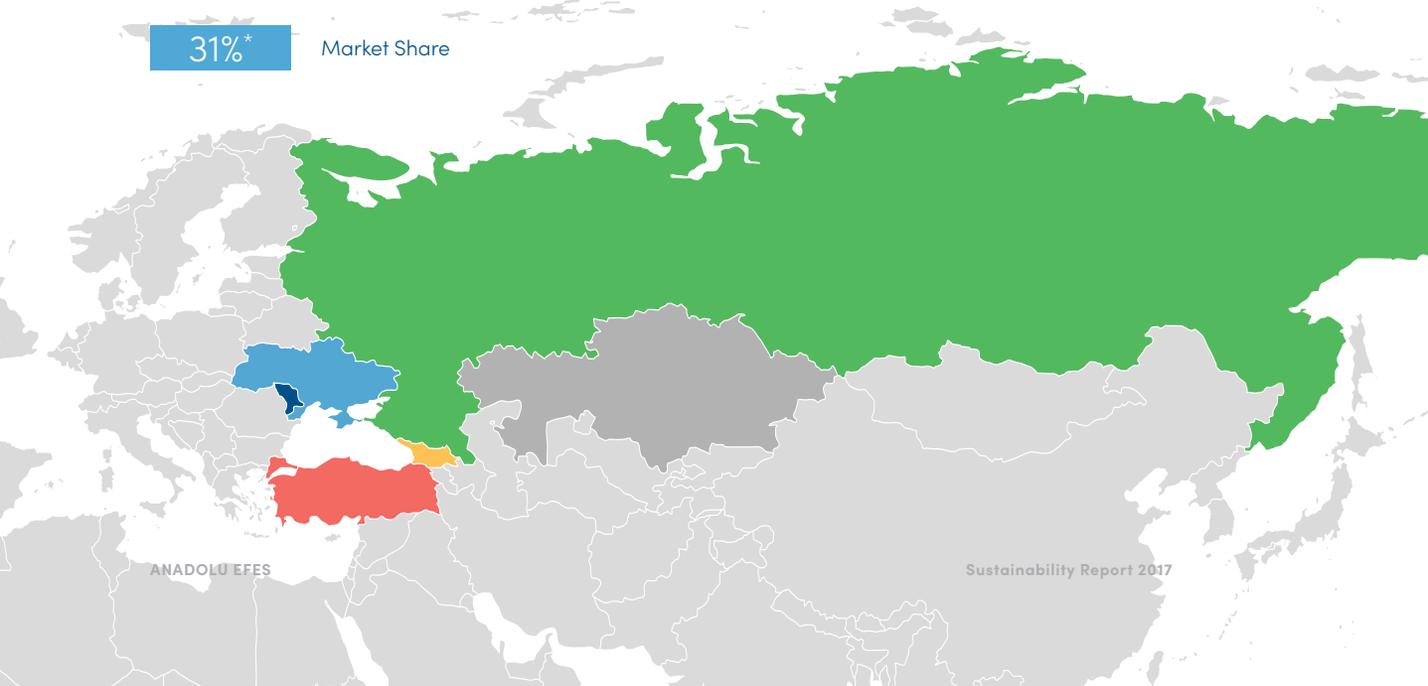
- 1 Brewery
- 3,2 mhl Beer Production Capacity
- 41 Beer Consumption per Person in Liters
- 31%\* Market Share

### Moldova Market Leader

- 1 Brewery
- 1,3 mhl Beer Production Capacity
- 30 Beer Consumption per Person in Liters
- 61%\*\*\* Market Share

### Georgia Market Leader

- 1 Brewery
- 1 mhl Beer Production Capacity
- 23 Beer Consumption per Person in Liters
- 49%\*\* Market Share



## Sustainability Milestones



The ISO 14001 Environmental Management System set-up at all plants is still in place and sees continuous improvement.

2004

2011



Anadolu Efes earns the privilege to represent Turkey in sustainable agricultural applications at the United Nations Conference on Sustainable Development.

2012

2013

Anadolu Efes obtains the ISO 50001 Energy Management Systems certificate, a first in the industry.

Anadolu Efes signs the United Nations Global Compact, taking its commitments to a global level.



United Nations Global Compact

Anadolu Efes becomes the first Turkish company to be included in the Dow Jones Sustainability Index.



Dow Jones Sustainability Indexes



### The CEO Water Mandate

Anadolu Efes signs CEO Water Mandate, an initiative of the United Nations Global Compact Principles, becoming the first Turkish company to participate.



It becomes the first-ever Turkish company to be listed in the Vigeo Eiris Emerging Market 70 Ranking.

2014

2015

2016

2017

Anadolu Efes is included in the BIST (Borsa Istanbul) Sustainability Index.

Signs the United Nations Women's Empowerment Principles (WEPs).



Starts responding to Carbon Disclosure Project (CDP) Climate Reporting.

Identifies material issues with a comprehensive stakeholder analysis and updates the Positive Impact Plan strategy accordingly.

## 2017 Highlights

We identified material issues with a comprehensive stakeholder analysis and renewed the

### Positive Impact Plan strategy.

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### Carbon Disclosure Project



We started climate reporting in Turkey.



We achieved a **15%** reduction\* in energy consumption per product in beer production.

We decreased our water consumption by **38%**,  
and waste water discharge by **41%\***.



Our ratio of female executives reached **38%**.

Our total greenhouse gas emissions decreased by **9%\***.

\* Progress in comparison to 2008



Our accident frequency rate dropped by **32%** year-on-year.

We trained **97%** of our dealers and distributors,  
providing nearly **2 hours** of training per person and  
ve toplamda **548 person/hours** in total.



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We sourced **72%** of our raw material  
need from contract farmers.



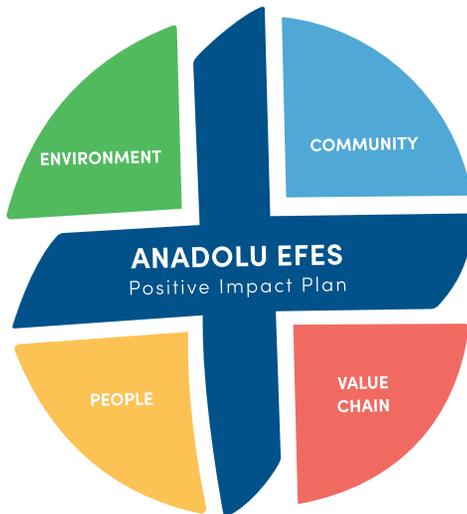
We provided **1,600 total hours** of  
training to **200** manufacturers as part of the Contract Purchase Model.



We supported the Four Seasons of Foça, Birds Calling You,  
and an History Break initiatives as part of the  
**“Future is in Tourism” Project.**

## Anadolu Efes Positive Impact Plan

We strive to contribute to socio-economic development with a focus on people and nature as part of the Positive Impact Plan, a plan that defines our sustainability strategy. This year, we have revamped the headings and structure of our positive impact strategy. We achieved this by conducting a materiality analysis with participation from our stakeholders. We aim to consistently bolster the effect by creating a positive impact in four areas: the environment, community, people and the value chain. With the help of our stakeholders, we are forging ahead to accomplish our goals in these areas.



We believe it is important to develop international and multi-stakeholder collaboration and emphasize contributions to the Sustainable Development Goals as part of our impact area. We take part in global initiatives in material areas as a signatory of the UN Global Compact, the UNGC CEO Water Mandate, and the Women's Empowerment Principles.

### Materiality Analysis

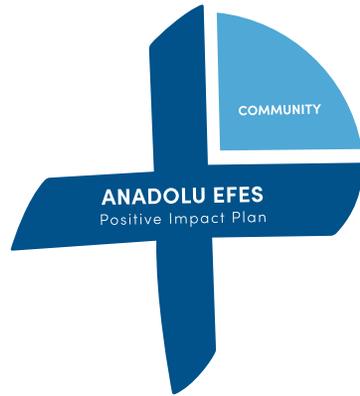
We shaped the four areas of the Positive Impact Plan according to our material issues. In identifying our material issues, we consulted with our stakeholders and identified common issues by aligning the priorities of Anadolu Efes with the company strategy.

#### Stakeholders' Priorities:

We conducted online questionnaires with stakeholders grouped as employees, customers, dealers, suppliers, public institutions, NGOs, and associations. Here, we learnt what they know and expect with regards to priority issues and sustainability. We analyzed global trends, industry priorities, and the views of our stakeholders, and included them in our process.



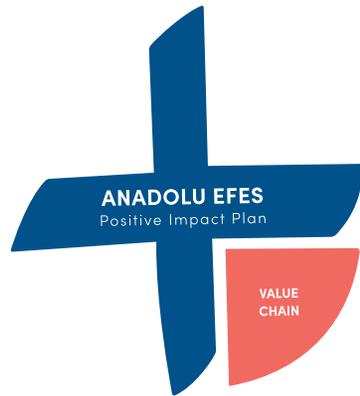
- 9 INDUSTRY INNOVATION AND INFRASTRUCTURE
- 12 RESPONSIBLE CONSUMPTION AND PRODUCTION
- 13 CLIMATE ACTION
- 17 PARTNERSHIPS FOR THE GOALS



- 1 NO POVERTY
- 5 GENDER EQUALITY
- 8 DECENT WORK AND ECONOMIC GROWTH
- 10 REDUCED INEQUALITIES
- 17 PARTNERSHIPS FOR THE GOALS



- 5 GENDER EQUALITY
- 8 DECENT WORK AND ECONOMIC GROWTH
- 10 REDUCED INEQUALITIES
- 17 PARTNERSHIPS FOR THE GOALS



- 9 INDUSTRY INNOVATION AND INFRASTRUCTURE
- 11 SUSTAINABLE CITIES AND COMMUNITIES
- 12 RESPONSIBLE CONSUMPTION AND PRODUCTION
- 15 LIFE ON LAND
- 17 PARTNERSHIPS FOR THE GOALS

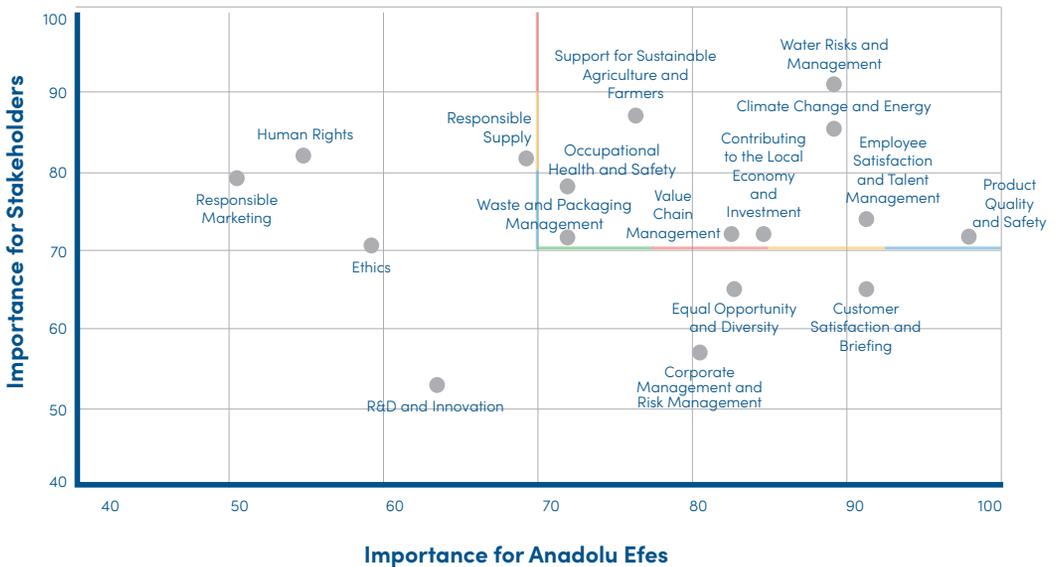
### Anadolu Efes Priorities:

We based our company priorities on the Anadolu Efes and sustainability strategy. Using online questionnaires, we collected the company priorities of directors to include in our analysis. We considered financial, social, environmental risks and legislative regulations when identifying the priorities.

### Material Issues

- **Environment:** Water risks and management, climate change and energy, waste and packaging management,
- **Community:** Contribution to the local economy and social investments,
- **People:** Talent management and growth, occupational health and safety, employee engagement,
- **Value Chain:** Value chain management, supporting sustainable agriculture and farmers, sustainable sourcing, product quality and safety.

## Materiality Matrix



## Stakeholder Engagement

Effective and mutual communication with the stakeholders is essential. We are working on maintaining a transparent communication by establishing different communication methods with the different stakeholder groups. We shape our sustainability strategy and efforts in line with the input from our stakeholders and use effective communication methods in keeping with the suggestions and opinions from the different stakeholder groups. We support growth in the industry by collaborating with the stakeholders.

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Stakeholder Group	Method of Communication
Employees	Satisfaction surveys, internal communication magazine, quarterly bulletins, intranet portal, Anadolu Efes Quality Circles, events and voluntary activities, OHS Board meetings, annual and sustainability reports, websites, stakeholder analysis
Public Institutions	Meetings and conferences, annual and sustainability reports, websites, stakeholder analysis, one-on-one meetings, effective relationship management, lobbying activities
Distributors and Dealers	One-on-one meetings, annual and sustainability reports, websites, stakeholder analysis
Suppliers	One-on-one meetings, audits and trainings, annual and sustainability reports, websites, stakeholder analysis
Associations and NGOs	Joint projects, collaborations, meeting and workshop group participation, seminars and conferences, annual and sustainability reports, websites, stakeholder analysis
Shareholders, Investors and Analysts	General assembly meetings, material disclosures, press releases, one-on-one meetings, correspondences, conferences, intermediary institution/bank reports, seasonal briefing, annual and sustainability reports, websites, stakeholder analysis
Universities	Internship programs, career days, conferences, websites, annual and sustainability reports, stakeholder analysis

## Corporate Memberships and Working Groups

We believe that sustainable progress is only possible through collaboration with all stakeholders. That's why we participate in various associations and initiatives and assume an active leadership in working groups.

### Participation in Associations and Initiatives

Beer and Malt Producers' Association (BMUD)

Brewers of Europe (BOE)

Corporate Communicators Association

Corporate Governance Association of Turkey

Corporate Relations Institute

Environmental Protection Foundation (ÇEVKO)

Ethics and Reputation Society (TEID)

Food and Drink Industry Associations of Turkey Federation (TGDF)

International Investors Association (YASED)

Manufacturers and Importers Association of Alcoholic Beverages (ALKİDER)

Private Sector Volunteers Association

Public Communication and Corporate Relations Management Association (KIYED)

Sustainability Academy

Sustainable Development Association

The Union of Chambers and Commodity Exchanges of Turkey (TOBB)

Third Sector Foundation of Turkey

Turkey Quality Association

Turkey Seed Industry Association (TURKTED)

Turkish Industry & Business Association (TUSIAD)

UN Global Compact (UNGC)

## Stakeholders' Views

### **TÜSİAD Chairman Erol Bilecik**

*"In order to accomplish our Sustainable Development Goals, we need to abandon our usual business approach and come up with more inclusive and innovative solutions. I believe Anadolu Efes is leading the industry and the entire business community by example with its steps to achieve more efficient water and energy usage as well as reduced environmental impact through waste and packaging management.*

*TÜSİAD recognizes and encourages industry leaders to expand their present resources, sustainability experience and overall vision throughout the whole value chain. In line with this vision, Anadolu Efes supports its suppliers as part of the agriculture support programs and advocates for more eco-friendly and more effective production. Anadolu Efes has turned social benefit into corporate culture through their sports, culture, arts and tourism projects, particularly those that serve the local economy. I am pleased to see that for many years it has enjoyed a well-deserved reputation in the eyes of all stakeholders.*

*I would also like to congratulate Anadolu Efes for its transparent communication with stakeholders, its upholding of international standards, and for leading the industry by raising the reporting standards each year."*

## Sustainability Management

An effective and transparent management is key to delivering the Positive Impact Plan, or our sustainability vision. We pursue the sustainability goals and efforts under the helm of the CEO with participation from all countries.

We are aware that the goals we set can be achieved through a system that encompasses all operations and employees. This year, we are increasing our efforts to complete our new structure.

Under the leadership of our CEO, all country directors are responsible for sustainability efforts in their own countries. We have completed this year's materiality analysis, identifying material issues and revising the positive impact model with the contributions and support of our CEO. We intend to go forward with the Positive Impact Working Group, which we have created to monitor progress of our goals and performance.

Meanwhile, we continue to monitor our sustainability performance and progress through our KPIs. KPIs are also used in our executives' individual performance assessments.

### Sustainability Committee and Working Group



## Ethical and Transparent Governance

Ethical and transparent governance underlies our sustainability efforts and business practices. To this end, Anadolu Efes Business Ethics Principles provide the necessary guidance. These principles define the code of conduct at Anadolu Efes in a variety of aspects including: human rights, anti-corruption, anti-bribery, responsible drinking and environmental responsibility.

Breach of these principles may be tipped off anonymously on the efesethicsline websites or by calling a telephone hotline set up for each country. An independent company reviews these tip-offs and resolves them by taking necessary measures. Group Ethics Committee reviews the breaches and decides on appropriate disciplinary actions.

Anadolu Efes Code of Conduct and Ethics is available on [http://www.anadoluefes.com/dosya/calismaprensipleri\\_in/anadolu-efes-code-of-business-conduct-and-ethics.pdf](http://www.anadoluefes.com/dosya/calismaprensipleri_in/anadolu-efes-code-of-business-conduct-and-ethics.pdf)

# Environment



**9** INDUSTRY, INNOVATION  
AND INFRASTRUCTURE



**12** RESPONSIBLE  
CONSUMPTION  
AND PRODUCTION



**13** CLIMATE  
ACTION



**17** PARTNERSHIPS  
FOR THE GOALS



## Environment

We are a brewer that sources its main raw materials from nature. As such, we consider environmental sustainability our responsibility to future generations and an essential element of long-term success.

We adopt innovative technologies and approaches and use natural resources responsibly with our people- and eco-friendly business model. We are proactive about managing environmental risks. We make regular investments to improve our efficiency and reduce our environmental footprint across our value chain. In line with our aim to lead the industry, we inspire positive change and create awareness through collaborative efforts with our stakeholders.

We have established climate change and energy management, water management, and waste and packaging management as material areas of the Positive Impact Plan. This is based on external trends and the opinions of our stakeholders.

Our Environment, Energy, Climate Change and Water policy governs the way we manage our environmental impact. We aim to perform beyond the legal requirements in our areas of operation with a systematic approach. We take the necessary measures by assessing environmental risks in accordance with our risk management system. We maintain operations in compliance with internationally accepted environment and

energy management standards, such as ISO 50001 and ISO 14001. Additionally, in line with our sustainability goals, we monitor our environmental performance and regularly and transparently share it with our stakeholders.

We seek solutions to environmental issues by collaborating with our stakeholders across local and international platforms. As a member of the Turkish Industry and Business Association (TÜSİAD) Energy Working Group, we support energy efficiency efforts in the private sector. As a member of the TÜSİAD Food, Drink and Agriculture Working Group and the Sustainable Development Association (SKD) Sustainable Agriculture and Access to Food Working Group, we help improve sustainability in agriculture. Also, as a member of the Environmental Protection Foundation (ÇEVKO), we continue to support projects tackling the issue of packaging waste.

We believe our employees greatly contribute towards improving our environmental performance and creating awareness. We provided 1,327 person/hour training to our employees in this reporting period. In the same period, we invested and spent over \$2.3 million for the environment.

## Climate Change and Energy Management

Climate change is regarded as one of the gravest issues faced by humanity due to its impact on the environment and wildlife, as well as on community and the economy. The impact of climate change poses a risk to many areas of our business, such as lower productivity in barley and hops farming, pressure on declining water sources, and increased risks on the physical assets caused by more frequent and severe weather events.

We aim to reduce our greenhouse gas emissions by using energy sources more efficiently. This is part of our continued effort to fight climate change and its effects. In conjunction with our sustainability goals, we monitor our energy and greenhouse gas emissions performance according to international standards.

We conduct work in a wide variety of areas, including investment in low-emissions new technologies, initiatives that encourage a behavioral change in energy efficiency, investment in energy-efficient coolers, and optimization in the logistics network.

In 2017, we began reporting our climate change strategy, goals and performance in Turkey operations as part of the CDP Climate Program. We also had our greenhouse emissions data verified.



### 2020 Goal

Decrease the energy consumption per product by **17%** in comparison to 2008.

### 2017 Performance

We reduced energy consumption per product by **15%** in beer production.

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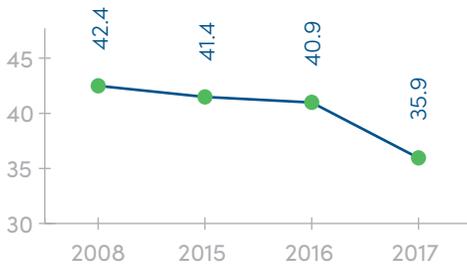


Environment



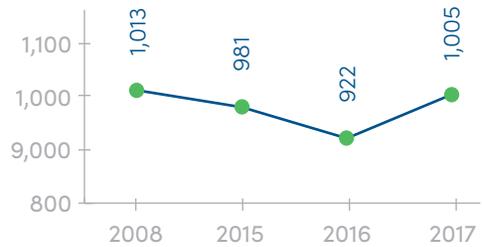
<b>Beer Production</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>
Energy Consumption (kWh)	846,804,765	799,104,619	752,022,286
Greenhouse Gas Emissions (Scope 1&2 – ton CO <sub>2</sub> e)	264,907	252,695	249,288
<b>Malt Production</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>
Energy Consumption	175,152,105	159,438,688	165,515,864
Greenhouse Gas Emissions (Scope 1&2 – ton CO <sub>2</sub> e)	43,472	41,215	40,358

**Beer – Energy Consumption Per Product**



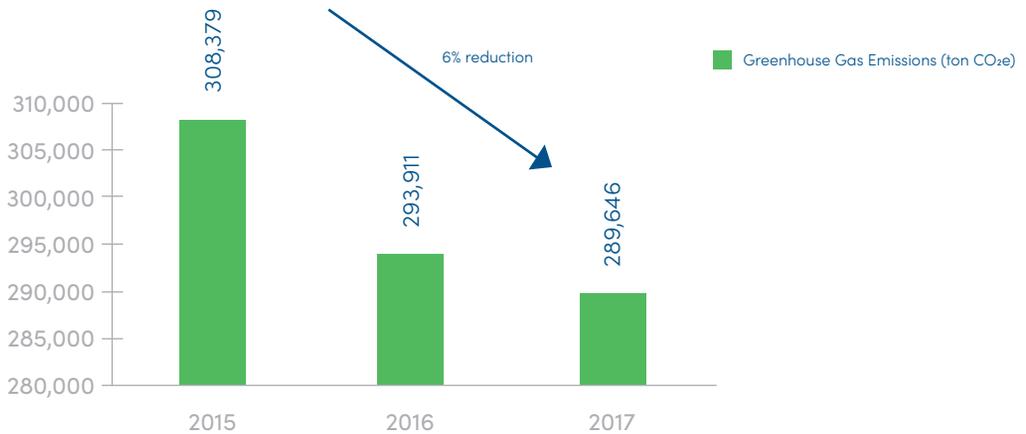
Energy Consumption Per Product (kWh/hl)

**Malt – Energy Consumption Per Product**



Energy Consumption Per Product (kWh/ton)

**Greenhouse Gas Emissions**



During the reporting period, we conducted energy efficiency improvements in all our facilities, which helped achieving significant energy savings and mitigating greenhouse gas emissions. The improvements in heating and cooling processes in Russia operations saved nearly 5.5 million kWh of energy consumption. Process improvement and automation investments in Georgia facilities provided more than 1.3 million kWh of energy savings as well as over \$75,000 in financial savings. We saved 320,000 kWh by transitioning into LED technology in the lighting systems in Kazakhstan and Moldova. We also attained nearly 1.8 million kWh of savings by transitioning into LED lighting technology, investing in the reuse of waste-heat, and automating processes in Turkey facilities.

### Energy Efficiency in Coolers

We have coolers in sales and consumption points so as to present our products to customers in high quality and in ideal tasting conditions. We are conducting energy efficiency improvements in the coolers to reduce energy consumption, increase performance and minimize environmental impact. We save 0.5 kWh per cooler annually as a result of the transition investment into next generation models with electronic thermostats. The share of next generation coolers in the total rose to 35 percent.

## Water Management

One of the building blocks of sustainable development is access to sufficient amount of hygienic and healthy water for all living beings. Water resources are depleting due to a myriad reasons such as increasingly frequent droughts brought on by climate change, and rising consumption and pollution because of growing global population. According to the "Turkey's Water Risks Report" by the WWF, 80 countries that account for 40 percent of the world's population experience water shortages. In line with the population growth projections, Turkey is expected to become a "water poor" country by 2030 based on per capita water amount classification.

At a time with higher water risk projections, we are aware of our duty to come up with a solution as a beverage company that needs water in every stage of its value chain. Effective water management is essential for the sustainability of our operations. Water makes up a significant portion of our products. It is intensely used in barley and hops agriculture as well as in every single stage from production processes to packaging. As part of the Positive Impact Plan, water risks and management are among our top priorities to help support the Sustainable Development Goals and become a reliable neighbor by monitoring our social and environmental impact, in addition to ensuring continuity in production.



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Environment



We manage all our operations with a responsible attitude that secures water resources and the needs of future generations, and with an eye for constant improvement. We run water management operations in compliance with the Anadolu Efes Water Policy, which outlines our strategic approach about the matter.

Having including water management in the corporate risk management, we monitor our performance systematically with short and medium-term tangible goals. We regularly assess water risks across our value chain, and take necessary measures. We encourage our people to develop innovative approaches to using water efficiently at workplace by monitoring our water usage as part of key performance indicators of the company as well as of individual KPIs of our executives.

We aspire to achieve stakeholder participation and develop collaborations locally and internationally in order to reinforce our water management efforts and create a positive impact. In 2014, we became the first Turkish company to sign the UNGC CEO Water Mandate initiative, which mobilizes business leaders to find sustainable solutions to water risks. Accordingly, we provide all stakeholders with sustainability reports to give regular and transparent updates about our performance on water management

commitments. In 2017, we continued to lead the Water Working Group of the Sustainable Development Association of Turkey.

In order to accomplish our commitment to produce more while consuming less water, we constantly invest in projects that improve operational water efficiency. Each country operation under Anadolu Efes contributes to reduction of water consumption per unit product by making progress on its own goals.



## 2020 Goal

Reduce water consumption and waste water discharge by **30%** in comparison to 2008.

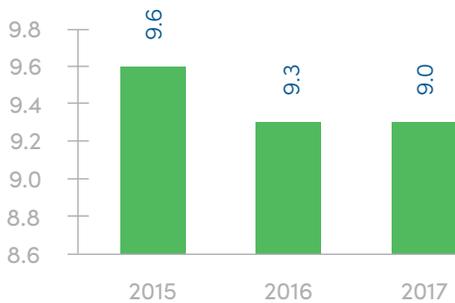
## 2017 Performance

We surpassed our goals with a **38%** decrease in water consumption and nearly **41%** drop in waste water discharge.

We saved nearly 200,000 m<sup>3</sup> of water as a result of many water efficiency projects we carried out during the reporting period such as water reuse, insulation, eliminating leaks, reverse osmosis, recycling, and optimization of current lines.

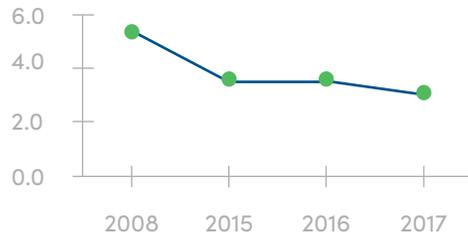
The aim of our water management initiative is to minimize our environmental impact while discharging minimum amount of waste water by implementing practices that go beyond the legislation in the areas we operate.

### Total Water Consumption



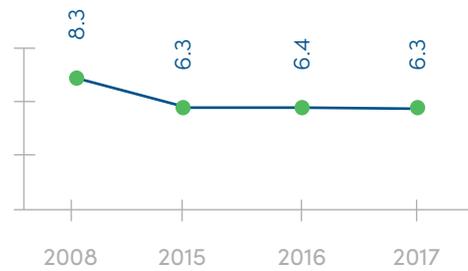
■ Total Water Consumption (million m<sup>3</sup>)

### Beer - Water Consumption per Product



● Water Consumption per Product (hl/hl)

### Malt - Water Consumption per Product



● Water Consumption per Product (m<sup>3</sup>/ton)



## Waste and Packaging Management

We recognize the importance of waste management for efficient use of our resources and effectively managing our environmental impact. We aim to create minimum level of waste across the value chain of our products. Our waste management initiatives comply with the legislation in the areas we operate and with our Environment Policy. And our efforts range from preventing waste creation at the source, to implementing innovative practices that improve resource efficiency in production, and increasing the use of recycled materials. As part of the waste and packaging management, our sustainability goals include constantly developing new methods to increase waste recovery rate and to use more efficient materials.

We manage waste systematically at all our facilities with the objective of minimizing the amount of waste sent to landfills. We take steps for recovery and recycling of all waste, ranging from all kinds of waste created during production to electronic waste created at the offices. During the reporting period, we recycled over 34 tons of waste by working with a new supplier for the green and brown color glass waste, which we weren't able to recycle at the Russia operations.

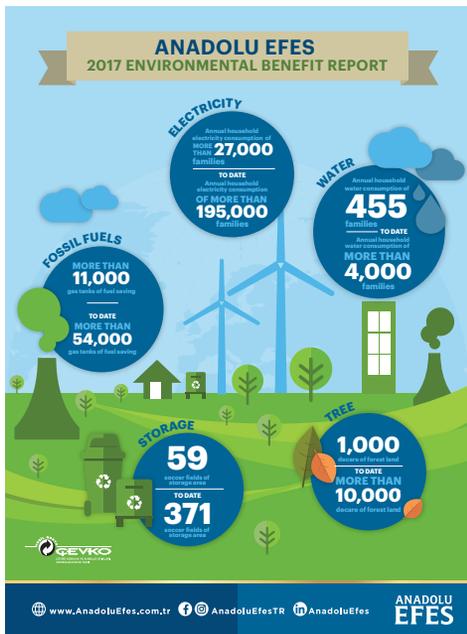
We assume responsibility to decrease the waste arising from our operations as well as the packaging waste created by our products. Packaging materials are needed to present our products to consumers with perfect quality and hygiene, but their waste creates an environmental impact after consumption. To mitigate the impact, we decrease the use of packaging through innovative approaches and prefer reusable or recyclable packaging materials with low environmental impact. To this end, we collaborate with multiple departments.

Innovative design, R&D and supplier collaborations play an essential role in packaging material optimization. We saved over \$85,000 in the reporting period as a result of the efforts such as reducing packaging thickness, using less material in painting and printing processes through innovative approaches, and decreasing the waste created by optimizing the pallets used to transport products.

We adopt the same approach in our value chain to encourage our suppliers to use these packaging materials, expanding our sphere of positive impact by entering into collaborations with the suppliers and NGOs.

### Turkey

Steel Barrel	11.3%
One-way (No Refund) Glass Bottle	12.7%
Reusable Glass Bottle	45.1%
Aluminum Can	30.9%



We prefer reusable and recyclable materials, and encourage our own supply chain to this end. As part of our efforts in compliance with the country regulations where we operate, Turkey operations rank first with 56.4 percent use of steel barrel and reusable glass.

One-way packaging recycling rate soared to 80 percent in Turkey as a result of the efforts by the ÇEVKO Foundation, of which we are a founder.



Post-use recycling rates of our products:  
**steel barrels: 99%;**  
**plastic PE; 95%;**  
**glass bottles; 93%.**



**1** NO  
POVERTY



**5** GENDER  
EQUALITY



**8** DECENT WORK AND  
ECONOMIC GROWTH

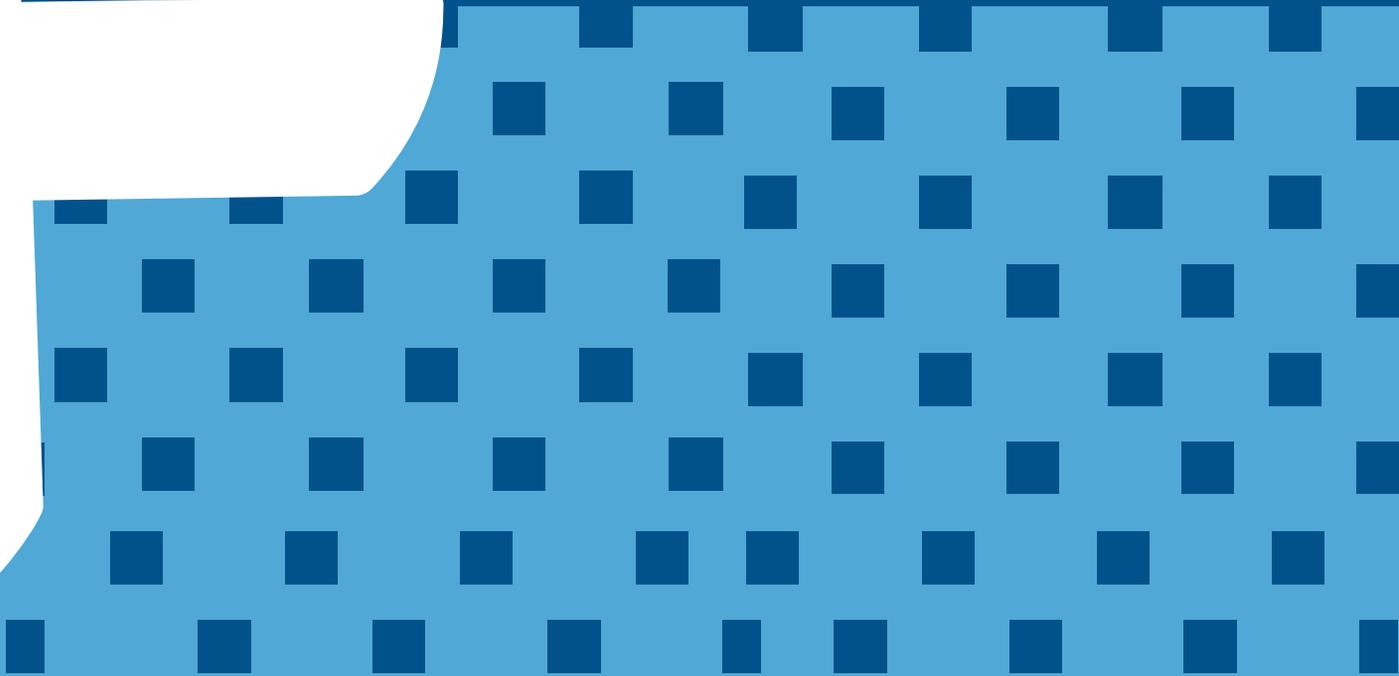
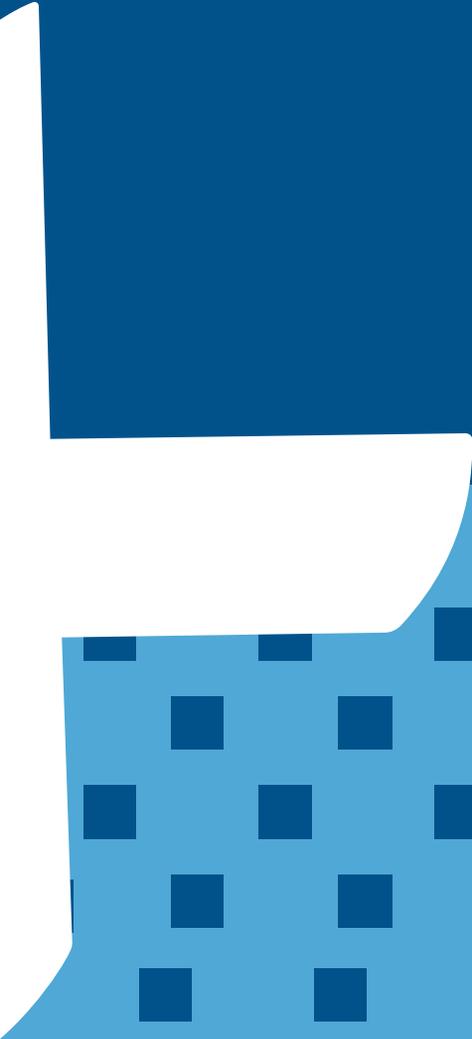


**10** REDUCED  
INEQUALITIES



**17** PARTNERSHIPS  
FOR THE GOALS





**Community**

## Community

We believe that the social projects developed in collaboration with different business partners play a crucial role in social development. Social investments make up a significant part of the Positive Impact Plan of Anadolu Efes. Our people- and eco-friendly business model designed with this mindset supports social development projects.

We align our social investment projects with the Sustainable Development Goals (SDG). This year, we maintained our efforts in Turkey by focusing on tourism, culture, arts and sports. In addition, we continued to develop projects that focus on people, the environment and agriculture in the countries where we operate.

## Contributing to the Local Economy

We provide support for the sustainability of barley and hops farming.

We base our social sustainable approach to the local economy and society's social development. With our industry's power to create jobs, we boost local employment and support local production. We contribute to the local economy, from production to employment, with our positive impact approach in the six countries where we operate. Also, we source products through local channels, preventing dependency to imported supplies.

Global trends such as climate change and resource scarcity increasingly undermine agricultural production. We recognize the important share of agriculture in local economy and support sustainable agriculture of barley and hops, our two main production ingredients.

In Russia, we revamped **76** water sources since 2010 as part of the project that aims to decrease the use of water and give local communities access to clean drinking water.

Thanks to our efforts, every year more than **150,000** people can access to clean water in Russia.

## The Future is in Tourism



Turkey's tourism potential is vital to country's economic growth. We believe that sustainable tourism will create a source of income for the local community. In this regard, we aspire to create a tourism-driven local development model through the "The Future is in Tourism" project, an initiative launched in 2007 in conjunction with the Republic of Turkey Ministry of Culture and Tourism and the United Nations Development Program.

## Stakeholders' Views

### **Bülent Açıkgöz, UNDP Inclusive Sustainable Growth Portfolio Manager**

*"Future is in Tourism is one of the finest examples of partnership between public and private sectors and international organizations. It has an important place in the agenda of the United Nations Development Program (UNDP). For 11 years, we have been conducting the 'Future is in Tourism' project in cooperation with the Ministry of Culture and Tourism and Anadolu Efes. The work began in 2007 with DATUR and in 2013 grew into a small-scale program we called Sustainable Tourism Support Fund. Every year, we made a request for grants so as to develop sustainable tourism models that could be scalable locally and also repeatable. To date, we have supported 15 grant projects in Turkey's different regions. As part of the Future is in Tourism project we have made and – will continue to make – direct and indirect contributions to the Sustainable Development Goals through initiatives supporting local economy, incentives for local businesses, employment creation, preserving social and cultural values, protecting biological diversity, waste management, gender equality, and efficient use of energy. In an effort to advocate community-based tourism approach and expand tourism to four seasons, we provide support by taking into consideration sustainable tourism criteria in diverse fields such as eco-tourism and cultural, rural, gastronomy, nature, experience or volunteer tourism. In all these initiatives, our fundamental goal is to accomplish social transformation, development and local growth by using sustainable tourism as an instrument of local development. The Future is in Tourism initiative lend great support in terms of creating awareness in tourism, diversifying and expanding tourism to all seasons in different regions, building partnerships, and in particular, creating employment for women. Also, studies support the idea of developing diverse types of tourism – one of the main ideas of the Turkish Tourism Strategy-2023 – in accordance with the economic, cultural, social and environmental sustainability principles and by focusing on tourism's local economic development aspect with a community based approach."*

Initially set out as the Eastern Anatolia Tourism Development Project (DATUR), the initiative bolstered the local economy with the creation of over 20 lodging houses and a number of NGOs servicing the tourism industry. Interest from domestic and foreign tourist has been built by activities such as festivals and bird watching excursions with an emphasis on ecological richness. Development of the sustainable tourism model has given rise to a system to provide livelihood for the local people while preserving the region's natural characteristics.

We fund three tourism projects each year as part of the project. In addition, we boost the growth and development of tourism in Turkey through the projects for which we provide consulting, mentoring and communication support. To date, we have supported tourism projects in 13 cities with a mission of cultural development.

During this reporting period, The Future is in Tourism project was named the "Best Corporate Social Responsibility Project" at the TÜHİD Golden Compass Public Relations Awards. It received the "Sustainability - Refik

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Community



Baydur Special Award" at the TISK Corporate Social Responsibility Awards; the "Gold Medal" in the Corporate Social Responsibility Category at the Hermes Creativity Awards; and the "Bronze Medal" for Europe's Best Social Responsibility Project at the Stevie Awards.

## Projects Supported in 2017

During the reporting period, we launched the following projects: the Four Seasons of Foça (Foça, Izmir), Birds Calling You (Buldan, Denizli), and A History Break: On the Lycian Way (Demre, Antalya).

### Four Seasons of Foça (Foça, Izmir)

We aim to introduce eco-friendly production and business models to tourism by supporting sustainable tourism operations. Foça is a great example for sustainable tourism with a diverse range of production activities such as traditional viticulture, fruit and vegetable farming, olive cultivation and coastal fishing. Subsequently, a comprehensive sustainable tourism plan has been developed for Foça in collaboration with the Town Governorship and the Municipality of Foça. With participation of all partners, four-season activities have been identified and a map of marketable handicrafts and industrial products have been created for Foça. Four Seasons of Foça has been turned into a brand name and tourism businesses have been trained to help with adoption of the sustainable tourism approach in Foça.

## Stakeholders' Views

### TUDER

*"Four Seasons of Foça project has made an immense impact in demonstrating the range of available activities in Foça. Communication efforts exhibiting the sustainable tourism potential, especially in and around the town, have helped expand the horizon of the visitors, local administration and tourism businesses. Foça and the project have gained publicity as a result of activities on social media, and also on the visual and print media.*

*Even though the project has ended, communication and promotion initiatives that began with the project still continue. The Sustainable Tourism Plan we have developed serves as the roadmap for the Association's future ventures. The efforts under the project have bolstered the local trust to the Foça TUDER. It has helped improve the competencies in terms of running a project and creating a common language within the Association.*

*We have also learned many things from the Ministry of Culture and Tourism, the Anadolu Efes and UNDP Turkey teams, as well as the project consultants."*

## Stakeholders' Views

### **Birds Calling You**

*"Our 25 years of sustainable local development efforts in Buldan have picked up momentum in recent three years with the 'Birds Calling You' project, run in collaboration with Anadolu Efes as part of the 'Future is in Tourism' initiative. Buldan became more popular across the country. The eco-system and bird diversity of Yayla Lake were recognized. Bird watchers, photographers, nature lovers and trekking groups started trips to the area. Buldan weavers began to embroider bird motifs on local handicrafts. Visitors to the town show higher interest in the products with bird motifs.*

*"Hoşgör's Dance with Birds" took place on September 1, 2018 in the ancient city of Tripolis. The event was put together by a team of designers under the helm of Prof. Günay Atalayer, an esteemed lecturer in textiles and the author of the books, "Buldan Weaving" and "Buldan Weaving Types." (Hoşgör is a fabric specific to Buldan.)*

*In October 7, Yayla Lake is set to host the European bird watching day, which will be celebrated in various locations around the world. A series of events are taking place in Buldan driven by the synergy created by the project. And the momentum is growing each day. We are confident that the local people have more to gain."*

### **Birds Calling You (Buldan, Denizli)**

Buldan Yayla Lake is a natural eco-tourism area, thanks to a wide range of bird types and rich biodiversity. We have conducted work to promote the area to unearth the potential presented by the Buldan district of Denizli. We have identified 163 different types of birds by taking an inventory of the birds in the area. The region has turned into an eco-tourism attraction with the creation of an alternative walking route. Local women have been trained on weaving the Yayla Lake birds on the Buldan fabrics, boasting 8,000 years of cultural heritage. Local economy has received a boost as a result of the exemplary sustainable tourism project.

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Community



## Stakeholders' Views

### ***A History Break: On the Lycian Way***

*"A History Break: On the Lycian Way project by our Association has played a vital role in setting an example. The project has become a exemplary model for the villages on the same route. Kapaklı Hoyran Culture, Tourism and Development Association is a spin-off from one of the project initiatives which is now participating in new projects and activities. In May, two volunteers from Austria gave English lessons to the locals and worked at the cafeteria. Also, following the training provided during the project, eight Kapaklı families have began generating an income from the lodging-house business they commenced last summer.*

*The Culture Routes Association and its supporters create myriad events with regards to post-project sustainability."*

### **A History Break: On the Lycian Way (Antalya-Demre)**

The Lycian Way is Turkey's first long-distance and the world's 10<sup>th</sup> longest walking route. The region possesses a significant tourism potential; the project has created awareness for sustainable tourism and accomplished continuity of local production with the items made by local women. Women who run the buildings in Kapaklı and Hoyran as cafeteria have began earning revenues as a result of the project which also aims to empower women.

## Culture and Arts

Support for culture and arts events is vital for socio-cultural development. Acknowledging the role of businesses in social development, we have been continuously supporting theater since 1992 and cinema since 1988. Our culture and arts investments initially began with the support in 1992 for the Evita musical in Istanbul. Today, we continue to support Turkey's major theaters with the likes of Dostlar Theater, Kenter theater, and Oyun Atölyesi. We help theater reach out to wider audiences and promote development of theater culture in Turkey with over 700 plays staged to date under Anadolu Efes' support.

We attach importance to development of cinema in Turkey and contribute Turkey cinema's publicity in international venues. Between 1990 and 2016, we were Turkish Cinema and International Competition theme supporter as part of the Istanbul Foundation for Culture and Arts (IKSV) and supported award-winning films by prominent movie directors of Turkish cinema such as Nuri Bilge Ceylan, Yeşim Ustaoglu, Derviş Zaim, Reha Erdem, Semih Kaplanoğlu and Zeki Demirkubuz. To date, the films we have supported have received 76 national and international festival awards.

## Anadolu Efes Sports Club

Established in 1976, Anadolu Efes Sports Club stands as our greatest social investment in sports with countless accomplishments under its belt, including the European Cup.

Anadolu Efes is the first team to every play in the Euroleague Final Four, proving the vital role that the businesses play in advancement of culture, arts and sports. We are very motivated to maintain our support for the Turkish sports and remain committed to fostering Turkish basketball.

The projects carried out under the auspices of Anadolu Efes Sports Club help us reach out to millions of people. We have created awareness for breast cancer with the Pembe Top Sahada (Pink Ball on the Pitch) project. We have delivered thousands of books to disadvantaged children with the Bir Kitap da Sen Getir (Bring a Book) project. We have helped social development of more than 15 children in need of protection with the One-Team Koruncuk Foundation project. On March 21 World Down Syndrome Day, children with Down Syndrome accompanied the team to the away game in Lithuania to create awareness for Down Syndrome.

Social projects by Anadolu Efes Sports Club have received countless awards. Anadolu Efes is the only Turkish team to receive the Euroleague Devotion Award. And, it has represented our country with success by becoming the only team to receive the award three times. Anadolu Efes has successfully represented the basketball ecosystem, taking two Felis and one Achievement awards in three different categories at the MediaCat Felis Awards. It has won the "Social Responsibility Project of the Year" prize with the Bring a Book Project at the awards organized by Aydın University.

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Community



**5** GENDER  
EQUALITY



**8** DECENT WORK AND  
ECONOMIC GROWTH



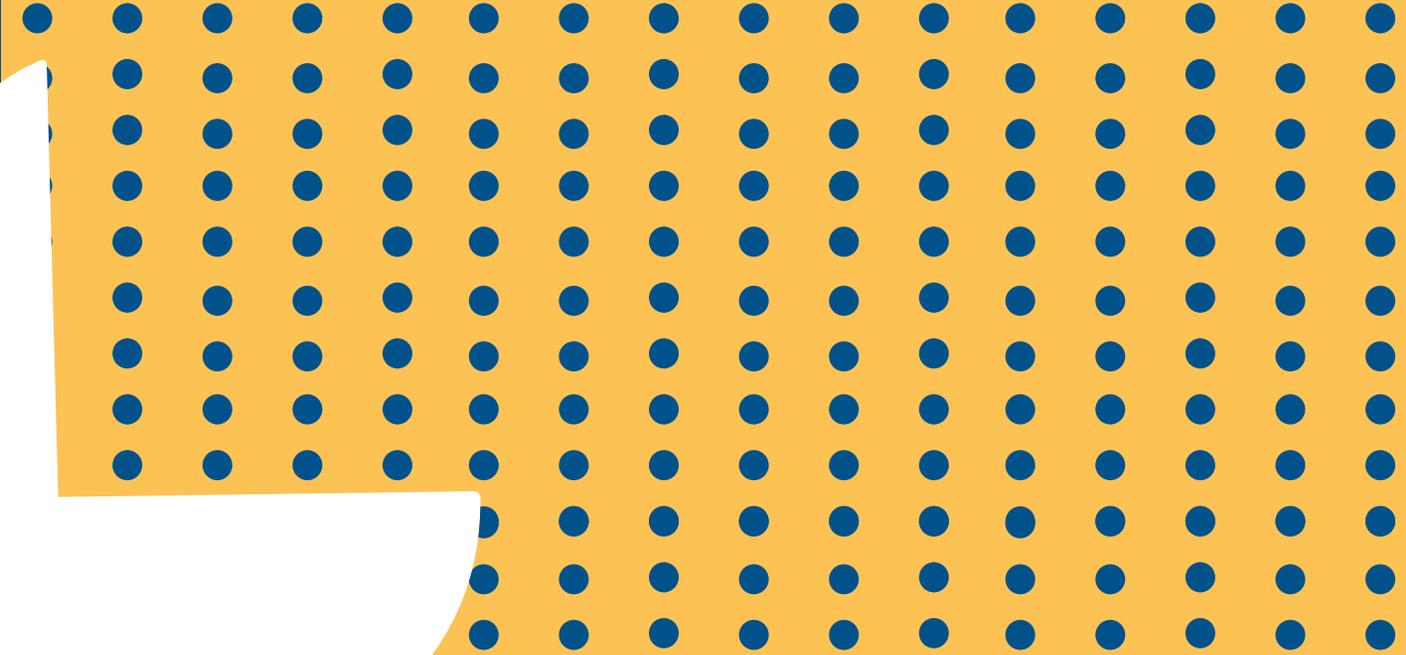
**10** REDUCED  
INEQUALITIES



**17** PARTNERSHIPS  
FOR THE GOALS



# People



## People

The focus of our business is people. This approach provides guidance to talent management, which makes the utmost contribution to our company's performance and success. Directed with the principles of transparency and integrity, our **Human Resources Policy** serves as the foundation of our relations with the employees and the values we embrace lead the way for constant improvement of the practices we offer to our employees.

In the multi-national and -cultural work environment of Anadolu Efes, we place emphasis on providing the employees with the tools to help improve their talents and on supporting their productivity and creativity. We draw strength from our differences and cultural diversity at the workplace. As a company with operations in different countries, we perform our work with responsibility by complying with the **Anadolu Efes Code of Business Conduct and Ethics**.

In addition to the principles adopted at the company, we maintain our commitment to providing a fair, equal and safe work environment with respect to human rights as a signatory to the UN Global Compact and the Women's Empowerment Principles (WEPs). Our Human Resource processes never discriminate against employees based on religion, language, race or ethnic

origin, as we pursue equal opportunity and offer equal opportunity for equal work.

Anadolu Efes Human Resources Policy is available at <http://www.anadoluefes.com.tr/human-resources/hr-policy>

## Diversity

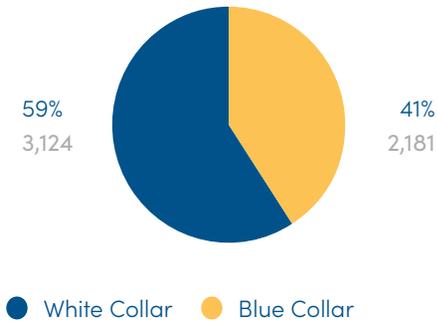
We recruit women at all levels. Women account for 25 percent of our 5,305 employees from different countries.

We recognize the business benefits of embracing differences, diversity and equal opportunity at the multi-national and -cultural Anadolu Efes. We support goals of achieving gender equality and reducing all forms of inequality, to which the business community can make a substantial contribution globally.

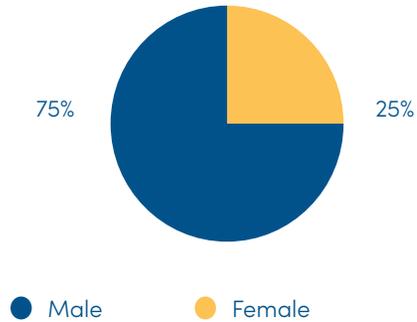
Studies<sup>1</sup> reveal that higher diversity and women's employment at companies can generate a growth of \$28 trillion in the global economy by 2025. To leverage this potential, Anadolu Efes supports recruitment of women at all levels in line with global objectives. Women account for 25 percent of our 5,305 employees from different countries. We have diverse talents in our organization. Of our total workforce, blue and white collar workers account for 59 percent and 41 percent, respectively.

<sup>1</sup> Women Matter Turkey, 2016, <http://www.mckinsey.com.tr/arastirma-ve-yayinlarimiz/WomenMatterTurkey2016Report.pdf>

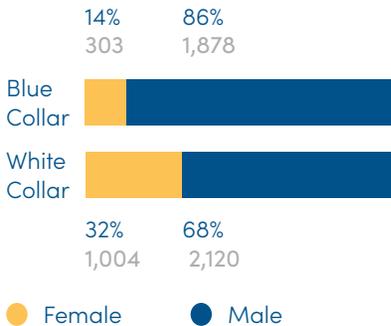
### Employees per Category and Gender



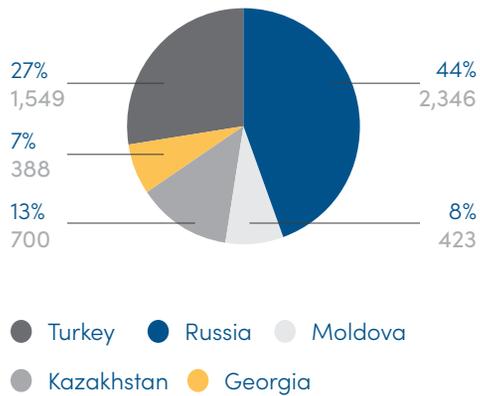
### Employees per Gender



### Employees per Category



### Employees per Operation Area



Ratio of our female executives rose to 38 percent in 2017, up from 29 percent in 2016. For the sake of diversity, we care for hiring executives from different cultures. Foreign nationals make up eight percent of our executives.

We create a work environment that allows our employees to freely exercise their association and union rights in all countries where unions can be formed. In 2017, the ratio of employees working under a collective bargaining agreement was 19 percent.

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People



## Talent Management

The only way for sustainable success in our industry is to acquire and retain talent at our company. We aspire to become an employer brand that is preferred the first and the most.

The company's first priority is to help improve employees' diverse talents and competencies with various training programs. We do so by focusing on our industry's requirements and different needs of the employees. The core of our talent management approach is to build a progress-driven, motivated and highly engaged workforce that functions as a team with a focus on the company's future and strategic objectives. We assess the potential of all employees through talent and succession programs, and build and update a talent succession map. We also devise leadership programs to internally fill the company vacancies and allow employees discover managerial competencies to fulfill their potential. Expanding the scope of employee growth opportunities is part of our objectives.

Personalized management approach is the foundation of all our programs. We provide training programs that allow different functions to keep up with the trends and improve their technical and leadership skills. We offer competency development training for all and manage it with a development catalog featuring both in-class and digital learning methods based on the company's strategic priorities.

We aim each employee to benefit from any of the development programs without discrimination or getting tied to any category. One of our important projects is the Special Assessment Center, aiming to strengthen the sales teams.

We have developed the Technical Talent and Development Project to bolster the growth of the technical function. This project aims to define our workforce's technical know-how and skills and behavioral competencies, devise development and career planning process, and built the infrastructure to create the technical teams' succession plans. In 2017, we have provided an average of 11.3 hours of training per person.

### Anadolu Efes Turkey Academy

Anadolu Efes Academy is our widely used electronic education platform, providing access to education through technological means. Anadolu Efes Academy stands by our employees in every phase of their lives by offering hobby-based training as well as professional training. Employees can access the Academy on any device, anywhere and anytime they wish by selecting the training modules from the catalog.

We place great emphasis on providing the employees with training that will help them demonstrate their potential and develop leadership skills. Our leadership programs are implemented in multiple countries and present a substantial avenue for talent management.

We also develop mentorship programs to benefit from the talents' experiences. All of our white collar workers are using Anadolu Efes Academy.

### **Anadolu Efes Turkey Leadership Pathway 2020**

Anadolu Efes Leadership Pathway 2020 (AELP2020) is a corporate leadership development program for middle and senior managers. As part of the program, managers develop competencies that will constantly advance their performance in a business world transformed by future trends. The AELP2020 Program provides the tools, technical and professional skills our managers need to attain a common leadership approach and language in the fulfillment of their duties and responsibilities. Employees trained within the scope of AELP2020 work on Action Learning Projects, enabling progress in business results and honing corporate and individual skills. The program offers e-learning opportunities for executives and directors, as well as one-on-one coaching and pier-coaching, and provides in-depth analysis through case studies. To date, 80 executives enrolled in the program.

### **Support and Communication Development Project**

This project helps identify the strengths and areas of improvement of the managers and directors and support their improvement. It has been devised to improve the executives' leadership and managerial skills, as well as situational leadership competencies, and get an insight on how they are perceived by their teams.

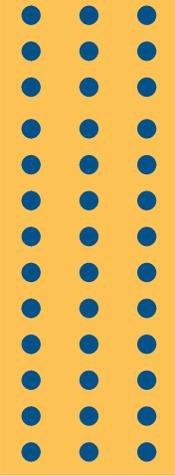
As part of the project, managers are assessed in terms of managerial skills by their direct reporting lines. The assessments are transparently shared during the project in which the executive teams improve on their managerial skills by receiving one-on-one coaching. Since the launch of the project, 70 executives joined this program.

### **Special Blend**

We implement the Özel Harman (Special Blend) mentorship program that allows executives to share years of know-how and experience with new generations. This program enables our executives to pass on their know-how and experience to the young talents in the company. The process greatly helps our employees with leadership skills development and personal growth. This year, 15 people took part in the program.

### **If I Were You Mentorship Program**

We have developed the Sen Olsam (If I Were You) mentorship program to build a communication bridge between the millennials and executives. Created to align different characteristics of generations for a common goal, the programs aims to keep up with the evolving trends; understand technology, social media, and the youth's expectations as well as their perspective on leadership and on the industry; an eventually share these insights directly with the executives.



## Performance Management

Performance management system is one of the most important tools to help employees improve their performance.

At the beginning of each year, we identify employees' professional and personal development goals and have them monitor these systematically through the Performance Management System, which encompasses all white collar workers.

64 percent of our employees go through the performance evaluation,<sup>2</sup> a decisive factor when setting salaries and benefits.

## Occupational Health and Safety

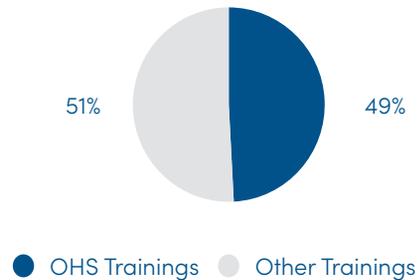
Offering our employees a safe workplace is the building stone of our business.

Efficiency and motivation rise significantly when employees feel safe. We take very seriously all of the processes in Occupational Health and Safety (OHS), an essential component of the international regulations we support.

Our target in occupational health and safety, which is now a strategic business target at the top management level, is to achieve zero work accidents and occupational disease.

We care about our employees' health and provide them with health checks and consultancy by specialist health teams.

We monitor the OHS performance benchmarks in all our facilities. We manage OHS processes in 16 facilities in accordance with the OHSAS 18001 management standard.



Training is crucial in explaining employees and creating awareness on the requirements of a healthy and safe workplace. In 2017, OHS training made up 49 percent of all training sessions.

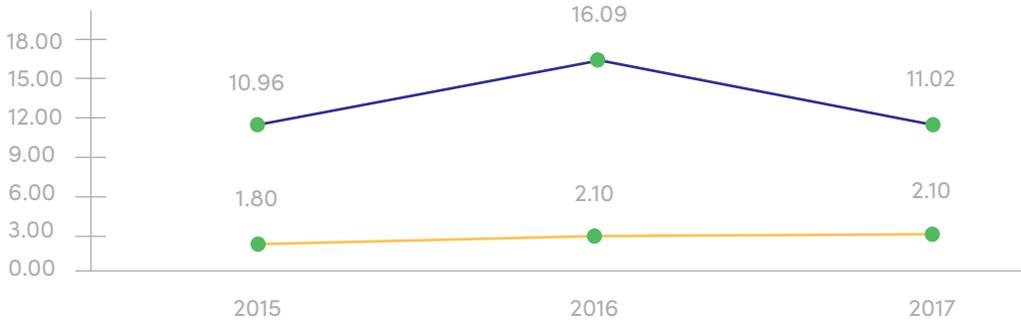
The safety handbooks created as part of the Anadolu Efes Golden Safety Rules describe in detail the working principles, risks and the necessary personal protective equipment.

We have reduced the number of accidents and achieved an 11.02 percent accident frequency with a 32 percent drop year-on-year by providing training, enforcing preventive practices and increasing employee awareness. And we did not encounter any occupational diseases or deadly accidents.

<sup>2</sup> The scope of performance management in Kazakhstan has also been extended to blue-collar employees

● Accident Frequency Rate  
 ● Lost Days rate

\*Accident Frequency Rate: Total number of injuries x 200,000 / Total working hours  
 Lost Days Rate: Total Days Lost x 200,000 / Total working hours



Occupational Health and Safety Committees gather each month with representatives from the employees and management to discuss all OHS related matters and required measures. The Committee includes senior management, on-site doctor and workplace safety experts. Union representatives, foremen and employee representatives also support Committee's work. Senior management is informed about the Committee's assessments and analyses.

We have prepared various posters, banners and visual to create awareness on OHS. In 2017, we used the "My Friend is Protected" slogan for the incentive reward mechanisms developed to raise employee awareness on risk reporting.

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People



### **Anadolu Efes Kazakhstan My Life, My Safety**

My Life, My Safety program is implemented to raise awareness in each employee, independent of position or category, on safe conduct and a healthy workplace. The three-tier structure – My Safety at Work, My Safety at the Office, and My Safety on the Road – provides safety information on all aspects of life and draws employees' attention to things to watch out for outside the work.

### **Employee Engagement**

Our people-centric approach reflects on employee communication as well. We attach great importance to internal communication and adopt bi-directional communication methods to improve interdepartmental collaboration and flow of information within the company. Internal communication magazine, quarterly bulletins and the intranet portal allow employees to keep up with all operational developments, while the events and volunteering activities we hold help enhance communication between the employees.

### **Anadolu Efes Quality Circles**

Anadolu Efes Quality Circles project offers employees a platform on which creative ideas are presented and all issues about the work and processes are discussed. It provides the employees with tangible benefits such as responsibility, self-actualization, better innovative and creative thinking, and job satisfaction.

### **Employee Events**

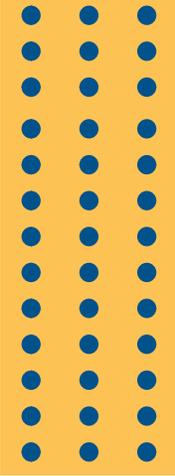
We hold widely-participated activities throughout the year for the employees in different departments and cities. The activities aim to reinforce communication, collaboration and team-work on a platform that brings everyone together. We have held innovative conferences and workshops such as, Personal Motivation Management, Success is a Choice, Give Feedback for Progress, helping the employees improve their competencies to collaborate.

## **Anadolu Efes Moldova Dialogue Meetings**

Employees and executives communicate at the Dialogue Meetings, held in a casual setting attended by plant managers. Employees share their Anadolu Efes experiences both with executives and team members as well as ask questions and make suggestions about the company practices.

## **Anadolu Efes Kazakhstan Communication Sessions**

Meetings are held with the employees to assess various human resources practices and projects such as the employee engagement survey results and the BiFikir (AnIdea) innovation program. Business Visits and communication events continue in four regions, responding to issues experienced especially by blue collar workers. Corporate media tools are used proactively at Efes Kazakhstan with the employees regularly updated about new recruits, birthdays, awards and company-wide changes.

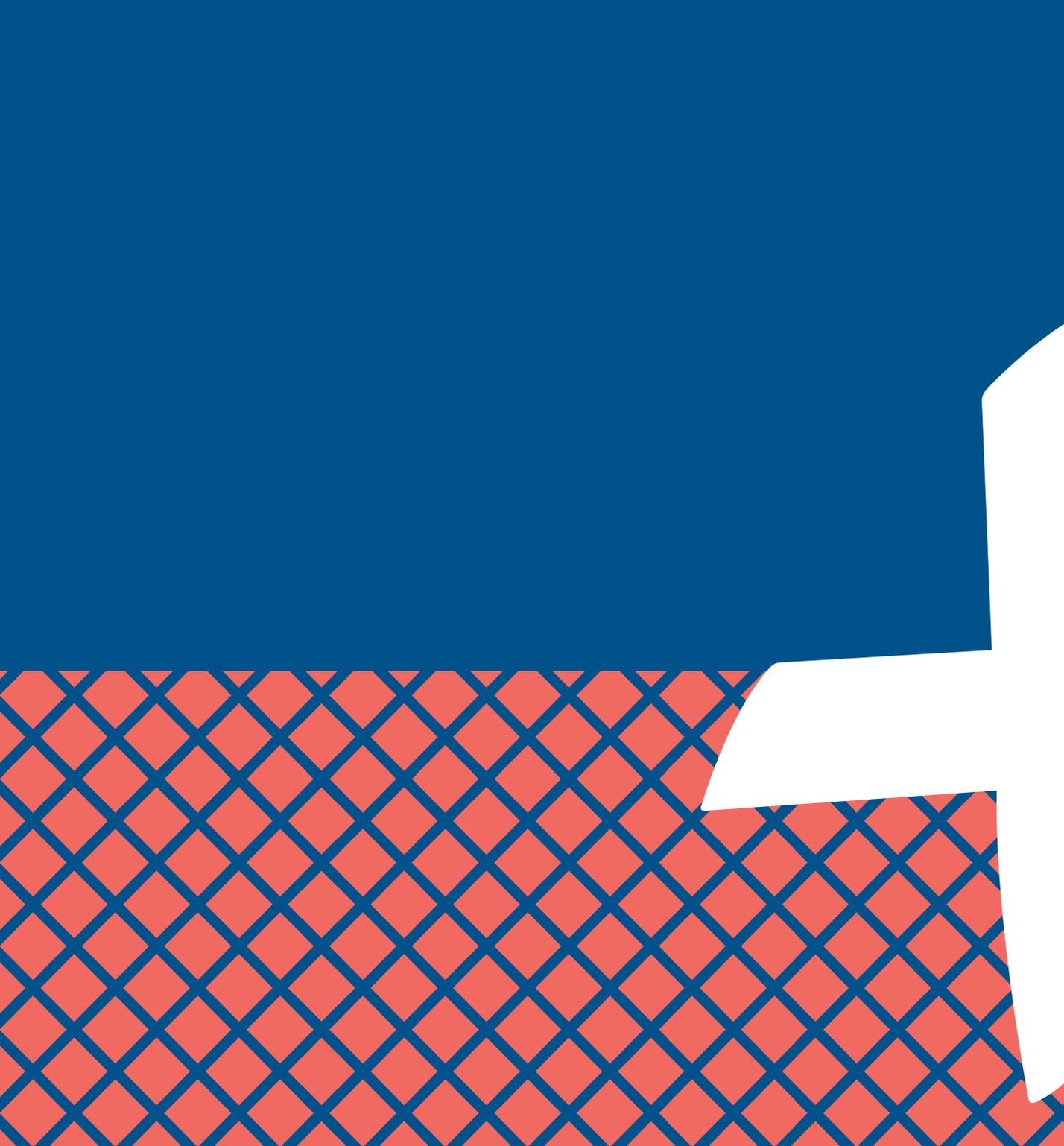


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People





# Value Chain

**9** INDUSTRY, INNOVATION  
AND INFRASTRUCTURE



**11** SUSTAINABLE CITIES  
AND COMMUNITIES



**12** RESPONSIBLE  
CONSUMPTION  
AND PRODUCTION



**15** LIFE  
ON LAND



**17** PARTNERSHIPS  
FOR THE GOALS



## Value Chain

We strive to make a positive impact for all stakeholders while managing our constantly growing eco-system as the fifth-largest brewer in Europe and the fifteenth-largest in the world. We bring social and economic added value to business partners through practices on the value chain that includes producers, customers, suppliers, dealers and distributors. We develop partnerships and collaborations to solidify the value chain. Our priorities include responsible sourcing, supporting farmers and sustainable agriculture and offering customers high-quality and safe products.

Activities geared towards developing the value chain also contribute to the United Nations 2030 Sustainable Development Goals.

## Suppliers, Dealers and Distributors

We advocate growth of the suppliers, dealers and distributors we work with by guiding them in adopting to the Anadolu Efes working standards. Long-term partnerships with stakeholders enable us to progress together. In 2017, the value chain comprised of more than 6,200 suppliers and nearly 350 dealers and distributors.

We lead and train our business partners to accomplish our economic, social and environmental objectives together.

The 2015 Code of Conduct for Suppliers set the standards on human rights, working conditions, and environmental and business ethics. We guide Anadolu Efes suppliers regarding the standards they are required to comply with. We regularly inspect the suppliers for compliance to the code of conduct.

Anadolu Efes Code of Conduct for Suppliers is available at <http://www.anadoluefes.com/dosya/kurumsal-politikalar/anadolu-efes-code-of-conduct-for-suppliers.pdf>



### Anadolu Efes Russia Supplier Partnership Program

We aspire to foster our main suppliers for raw material and packaging through the Supplier Partnership Program in Anadolu Efes Russia. This program includes approving and inspecting suppliers, service and quality management, and supplier assessment, in addition to holding regular meetings with the strategic raw material suppliers.

We offer our products to more than 300 million people through an extensive dealer and distributor network. We hold training sessions to boost occupational development of the business partners at sales points. In 2017, we provided 97 percent of the dealers and distributors nearly two hours of training per person and 548 person/hours in total.

Based on the business partners' needs in each country, we tailor professional development programs. Our 2017 curriculum covered diverse subjects such as Bushidones, professional management skills, business and profitability, communication, finance, mental infrastructure.

We collaborate with the Boğaziçi University Lifelong Education Center (BÜYEM) in training our dealers and distributors. We create the two-year programs with BÜYEM and give completion certificates to successful participants. As part of the programs, we have provided training to 123 dealers on business and profitability, law, communication and finance.

## Stakeholders' Views

### **Burak Atalay**

#### **Sales and Marketing Vice President, Şişecam Glass Packaging Group Turkey**

*"Responsible production and consumption is one of 17 Global Goals that make up the 2030 Agenda for Sustainable Development. An integrated approach is crucial for progress across the multiple goals. Siseecam Glass Packaging Group is committed to contribute to this goal and 2030 Agenda. We greatly appreciate that one of our largest partner, Anadolu Efes also equally acknowledge and integrates such sustainability principles and approaches in their operations. Anadolu Efes being one of the leader in its own field, plays an important role to be an international enabler to promote quality, food security and customers' satisfaction while also advocating the internationally recognized sustainability principles and associated values. Here, I would like to thank Anadolu Efes for their commitments and joining efforts to achieve 2030 Agenda for Sustainable Development."*

### **Gülten Coşkun**

#### **Okan Coşkun Meşrubat Gıda İnşaat Nakli Trz. / Distributor**

*"We have been working for 21 years with Anadolu Efes as a product distributor. Human resources, good recruitment practices, environmental protection, corporate governance, business ethics, and social and economic development initiatives by Anadolu Efes add value to the industry, our country and the world. Anadolu Efes steps up its potential to create added value for the stakeholders while delivering progress required to enjoy a better future together with its stakeholders. Talimhane EFES training program is vital for us, stakeholders, since its inception in 2012 for distributors and dealers. The Future is in Tourism, The Future is in Agriculture; Culture and Arts; and naturally, sports are finest examples for the sustainable approach of Anadolu Efes. We are proud stakeholders of Anadolu Efes."*

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Value Chain



## Support for Sustainable Agriculture

Climate change, one of today's gravest global environmental issues, have a direct impact on agricultural operations. Barley and hops are key raw materials used in beer production sourced from farmers. We ensure sustainable agriculture and business continuity through the practices we implement as part of the fight against climate change. We support sustainable agricultural growth and farmers' welfare with an eye to create positive value for our stakeholders. We strive to expand sustainable agriculture practices with the Agricultural R&D Program and the Contract Farming Model.

### Agricultural R&D Program

We invest in R&D to ensure continuous supply of high-quality raw materials and develop drought-proof products against climate change. As part of the Agricultural R&D Program, we have developed and registered 15 barley and seven hops types.

Developing raw materials through R&D and innovation yields positive returns in many ways. First of all, we achieve consistency in the product quality and flavor.

## Stakeholders' Views

### **İbrahim Akkaş, Farmer**

*"I've been working with Anadolu Efes for five years, producing hops on my farm in Pazaryeri. We, farmers, have benefited immensely from support by Anadolu Efes with the Contract Farming Model, purchase and price guarantee, advance payment, and equipment and direct support. We have focused on higher product quality without the hassle of figuring out where and how to sell our products. Producers gained a competitive market advantage, thanks to the support for agriculture and farmers by Anadolu Efes."*

### **Şefik Sayaner, Farmer**

*"My venture with Anadolu Efes began in 1983 when the foundation was laid for the plant. Çumra was completely swamp land, there wasn't even a single tree to seek shelter for a meal. I worked so hard during the construction of the plant. Anadolu Efes created a heaven on a barren and derelict land. Following R&D, the first test production of barley types was on my farm. So, I was the first person to observe the transformation of barley in my region. Anadolu Efes's barley on my farm would mesmerize other farmers. Everyone wanted to have it. Planting period is when the farmers need the money most. Fertilizer, seed and diesel oil require cash. During that time, Anadolu Efes gave us seeds under a contract without asking for money. Then, its technical team provided us help with barley cultivation. When the time came to harvest the barley, it paid for my barley in full to my account after deducting the dues for the seeds. What more could we ask for? I constantly recommend this system to my farmer friends to make it more popular."*

We perform effective water management as registered malting barley and hops types allow reducing water and energy consumption, while helping the fight against climate change. We place emphasis on developing drought-proof varieties that need less water and energy with minimum environmental impact.

### **Contract Purchase Model**

We practice the Contract Purchase Model to support agricultural producers' social, economic and environmental development. The model assures planned farming of the malting barley and hops types, which we have developed as part of the Agricultural R&D Program on the lands of about 3,500 farmers we work on a contract basis. We expect the farmers under contract to comply with production requirements for farming quality and safety with lesser environmental impact. We pioneer sustainable transformation in agriculture by providing all financial, operational and information support that the farmers need during the production process. After establishing the production goals, we provide the farmers with certified seeds for our registered products free of charge in return for production. We offer financing to help them meet production costs. We extend support in all technical issues, ranging from fertilization and irrigation to disinfection and harvesting, particularly in hops production. Specialists in our company provide consulting to farmers on sustainable agriculture and planned production practices.

In 2017, we provided 1,600 total hours of training to 200 farmers. We regularly inspect malting barley and hops producers as well as all other farmers contracted to produce seeds. The Ministry of Agriculture inspects seed producers.

We increase competitive edge of farmers and support development of regional agricultural activities by pursuing domestic production and purchasing of malting barley and hops. We aim to use domestic producers for all raw material purchases and export hops, a value added agricultural product. We sourced 72 percent of all our raw material needs from contracted farmers in 2017.

## **Product Safety and Responsible Marketing**

As a company with a reach of millions of consumers in over 70 countries, we operate with a focus on product safety and responsible marketing. We ensure superior quality and safety in production while creating a positive impact for our stakeholders by ensuring responsible consumption in marketing processes. And we continuously strive to maximize customer satisfaction.

### **Safe and Quality Products**

We are committed to offering world class products to consumers while achieving sustainability and consistency in product quality and flavor. In all operations in Turkey and abroad, we comply with the



ISO 9001 Quality Management, the ISO 22000 Food Safety Management System, and the HACCP Food Safety Management System standards. We process the malting barley and hops we have developed ourselves by using state-of-the-art production technologies with a quality-excellence approach. We offer consumers superior quality and safe products by producing only at facilities with food safety certificate.

Anadolu Efes Quality Policy is available at: <http://www.anadoluefes.com/dosya/kurumsal-politikalar/anadolu-efes-quality-policy.pdf>

### Responsible Marketing

Our product marketing is performed with a social responsibility approach. We have set forth responsible marketing principles by taking initiative in the industry, moving beyond legal and regulatory requirements. Anadolu Efes employees, dealers, distributors, and communication agencies are required to comply with our Marketing Communication Policy.

Anadolu Efes Marketing Communication Policy is available at <http://www.anadoluefes.com/dosya/kurumsal-politikalar/anadol-efes-marketing-communication-policy.pdf>

The alcoholic beverage industry is strictly governed by the laws and vary from country to county in terms of marketing communication. We conduct marketing to inform consumers about the risks of irresponsible drinking and to encourage them for responsible use. We ensure that our products are sold only at legally allowed points of sale and that they are not sold to persons below the legal age of consumption.



### Responsible Alcohol Use Campaign in Russia

In 2017, Anadolu Efes Russia continued the "Don't Drink and Drive" campaign, aimed to create awareness about the consequences for driving under the influence. The project ran in collaboration with the International Alliance for Responsible Drinking and Russian public institutions, reaching out to nearly **5,000 students** and **200 employees**. On the Russia Global Responsible Beer Production day, we aimed to raise awareness on responsible consumption by visiting the points of sales with volunteers.

## Customer Experience

We provide product information through product labels, web sites and consumer support hotlines in accordance with the laws and local legislation of the countries we operate in.

Since the foundation of Anadolu Efes, we have always strived to offer consumers a better experience. We develop superior-quality, safe and delicious products with more than 50 brands by focusing on changing consumer demands and expectations.

We conduct brand and product market researches and customer satisfaction studies to improve customer satisfaction. Such survey results are used in product development.

Giving product information helps enhance customer satisfaction. We provide product information through product labels, internet sites and consumer support hotlines in accordance with the laws and local legislation of the countries we operate in. We give consumers comprehensive information by offering more content on product label than required by the local legislation.

All stakeholders, particularly consumers, can send us feedback through the hotlines provided on product labels. We reply to all feedback received by the relevant Anadolu Efes departments through the hotlines. In 2017, 93 percent of the 3,219 feedback were resolved.

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Value Chain



## Performance Tables

### Environmental Performance Indicators

<b>Beer Production</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>
Beer production (hliter)	20,474,076	19,530,293	20,920,000
Malt production (ton)	178,470	173,009	164,670
Energy consumption in beer production (kWh)	846,804,765	799,104,619	752,022,286
Energy consumption in malt production (kWh)	175,152,105	159,438,688	165,515,864
Greenhouse gas emissions in beer production (Scope 1&2 – ton CO <sub>2</sub> e)	264,907	252,695	249,288
Greenhouse gas emissions in malt production (Scope 1&2 – ton CO <sub>2</sub> e)	43,472	41,215	40,358
Total energy consumption (kWh)	1,021,956,870	958,543,307	917,538,150
Total greenhouse gas emissions (Scope 1&2 – ton CO <sub>2</sub> e)	308,379	293,910	289,646
Greenhouse Gas Emissions in Turkey Operations (Scope 1&2 – ton CO <sub>2</sub> e)	100,653.7	87,995.6	86,063.70*
Total water consumption (million m <sup>3</sup> )	9.6	9.3	9.0
Total waste water discharge (million m <sup>3</sup> )	3	3.1	3.3
Hazardous waste amount (ton)	207,104	300,540	193,248
Nonhazardous waste amount (ton)	120,956	113,775	87,913
Total waste amount (ton)	328,060	414,315	281,161
Total environmental investments and expenses (million USD)	4.1	6.0	2.3

\*Independent audit company EY has audited the greenhouse gas emissions data for the 2017 Turkey operations. The Statement of Assurance on the scope of the audit is provided on page 62 of this Report.

## Social Performance Indicators

Employees per Gender	2015		2016		2017	
	Female	Male	Female	Male	Female	Male
Number of Employees	1,464	4,450	1,357	4,114	1,307	3,998
Total	5,914		5,471		5,305	

Employees per Category	2015		2016		2017	
	Female	Male	Female	Male	Female	Male
Blue Collar	205	2,144	330	2,002	303	1,878
White Collar	1,259	2,306	1,027	2,112	1,004	2,120
Total	5,194		5,471		5,305	

New Recruits based on Gender and Age	2015		2016		2017	
	Female	Male	Female	Male	Female	Male
Age 50 and over	28	36	2	6	5	6
Age 30 to 50	51	119	48	104	57	139
Age 30 and under	137	274	103	200	77	253
Total	645		463		540	

Terminated Employees based on Gender and Age	2015		2016		2017	
	Female	Male	Female	Male	Female	Male
Age 50 and over	49	123	48	82	43	96
Age 30 to 50	186	502	120	394	91	376
Age 30 and under	120	286	74	183	72	182
Total	1,266		901		860	

Trainings	2015		2016		2017	
	Female	Male	Female	Male	Female	Male
Average Training per Employee	29.3	24.4	27.5	26.4	9.8	11.7

Collective Bargaining Agreement (CBA)	2015		2016		2017	
	Female	Male	Female	Male	Female	Male
Employees under CBA	337	1,445	258	1,286	127	896

Executives based on Gender and Age	2015		2016		2017	
	Female	Male	Female	Male	Female	Male
Age 50 and over	3	16	3	15	6	10
Age 30 to 50	42	100	40	98	51	87
Age 30 and under	3	1	3	1	3	2
Total	165		160		159	

Senior Executives	2015		2016		2017	
	Local*	Foreign	Local	Foreign	Local	Foreign
Number of Executives	155	10	147	13	146	13

\*Local refers to nationals of the country of operation.

Maternity Leave	2015		2016		2017	
	Female	Male	Female	Male	Female	Male
Employees on Maternity Leave	137	3	129	14	35	12
Employees Back from Maternity Leave	56	3	73	13	32	12

<b>Occupational Health and Safety</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>
Accident Frequency Rate*	1.8	2.1	2.1
Occupational Disease Rate**	0	0	0
Lost Day Rate***	10.96	16.09	11.02
Number of Fatal Accidents	0	0	0

\*Accident Frequency Rate: Total number of injuries x 200,000 / Total working hours

\*\*Occupational Disease Rate = Total number of occupational disease incidents x 200,000 / Total working hours

\*\*\*Lost Days Rate = Total days lost x 200,000 / Total working hours

## Independent Assurance Statement

To the Board of Directors and Management of Anadolu  
Efes Biraçılık ve Malt San. A.Ş., İstanbul, Turkey

This Assurance Statement (hereinafter 'Statement') is intended solely for the management of Anadolu Efes Biraçılık ve Malt San. A.Ş. (hereinafter 'Anadolu Efes' or 'the Company') for the purpose of reporting on the Scope 1 and 2 greenhouse gas (GHG) emissions in its 2018 CDP Climate Change Response (hereinafter 'the Response') that has been prepared by the Company for the year ended 31 December 2017.

### Subject Matter Information and Applicable Criteria

We were engaged by the Company to provide limited assurance on the items listed below, together the 'Selected Information' as defined in the CDP Climate Change Response Questions 6.1 and 6.3.

### The scope of our assurance

The scope of our assurance is limited to total Scope 1 and total Scope 2 greenhouse gas emissions of Anadolu Efes operations from its breweries and malteries in Turkey for the Response (together 'the Selected Information') which has been prepared based on The Greenhouse Gas Protocol Corporate Accounting and Reporting Standard (Revised) (hereinafter 'GHG Protocol'). Our assurance statement should be read in conjunction with the GHG Protocol.

Scope 1 sources are fossil fuels, refrigerants, CO<sub>2</sub> purchases.

- Scope 1 sources are fossil fuels, refrigerants, CO<sub>2</sub> purchases.
- Scope 2 source is purchased electricity.

### The Company's Responsibilities

The Company's management is responsible for the preparation, collection and presentation of the Selected Information in accordance with the GHG Protocol. In addition, the Company's management is responsible for ensuring that the documentation provided to the practitioner is complete and accurate. The Company's management is also responsible for maintaining the internal control system that reasonably ensures that the documentation and information described above is free from material misstatements, whether due to fraud or error.

### Our Responsibilities

We conducted our assurance engagement in accordance with International Assurance Standards, particularly International Standard for Assurance Engagements Other than Audits or Reviews of Historical Financial Information ISAE 3000 (revised). These regulations require that we comply with ethical standards and plan and perform our assurance engagement to obtain limited assurance about the Selected Information.

We comply with the independence and other ethical requirements of the IESBA Code of Ethics for Professional Accountants, which establishes the fundamental principles of integrity, objectivity, professional competence and due care, confidentiality and professional behavior.

We apply International Standard on Quality Control 1 (ISQC 1), and accordingly, we maintain a robust system of quality control, including policies and procedures documenting compliance with relevant ethical and professional standards and requirements in law or regulation.

The assurance engagement performed represents a limited assurance engagement. The nature, timing and extent of

procedures performed in a limited assurance engagement is limited compared with what is necessary in a reasonable assurance engagement. Consequently, the level of assurance obtained in a limited assurance engagement is lower.

The procedures selected depend on the practitioner's judgment. The procedures include, in particular, inquiry of the personnel responsible for collecting and reporting on the Selected Information and additional **procedures aimed at obtaining evidence about the Selected Information.**

In respect of the Selected Information mentioned above the procedures performed include the following procedures:

1. Interviewed select key senior personnel of the Company to understand the current processes in place for capturing the Selected Information pertaining to the reporting period;
2. Reviewed Selected Information on site covering the Izmir facility of Anadolu Efes as well as off-site review of the Selected Information pertaining to the Company's other locations in Turkey, against evidence, on a sample basis;
3. Undertook substantive testing, on a sample basis, of the Selected Information;
4. Used the Company's internal documentation to evaluate and measure the Selected Information;
5. Evaluated the design and implementation of key processes and controls over the Selected Information;
6. Re-performed, on a sample basis, calculations used to prepare the Selected Information for the reporting period.
7. Evaluated the disclosure and presentation of Selected Information in the Report.

### Our conclusion

As a result of our procedures, nothing has come to our attention that indicates the Selected Information reviewed for the year ended 31 December 2017 was not prepared in all material respects in accordance with the GHG Protocol.

### Our assurance team

Our assurance team, comprising of multidisciplinary professionals, has been drawn from our climate change and sustainability network and undertakes similar engagements with a number of significant companies in Turkey and internationally.

We permit this report to be disclosed in Anadolu Efes Biraçılık ve Malt San. A.Ş.'s CDP Climate Change Response for the year ended 31 December 2017, to enable the Directors of Anadolu Efes Biraçılık ve Malt San. A.Ş. to show they have addressed their governance responsibilities by obtaining an independent assurance report in connection with the Selected Information. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Directors as a body and Anadolu Efes Biraçılık ve Malt San. A.Ş. for our work or this report except where terms are expressly agreed between us in writing.

### For Güney Bağımsız Denetim ve Serbest Muhasebeci Mali Müşavirlik A.Ş.

A member firm of Ernst & Young Global Limited



**Zeynep Okuyan Özdemir, SMMM**  
Partner  
İstanbul, August 15, 2018

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This report is prepared for corporate promotion purposes in accordance with Anadolu Efes Sustainability Strategy. It does not contain any advertising or promotion of alcoholic beverages directed at consumers.

# ANADOLU EFES

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