



Interim Results for the six months
ended 30 September 2014

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Financial & Operational Highlights

- Six months ended 30 September 2014

Interim results reflect the continued successful delivery of the strategy:

Results for the period:

- Operating profit up 6.4% to £73.2 million in the seasonally less significant first half
- DCC Energy's operating profit modestly behind the prior year impacted by very mild weather during the period
- Operating profit growth (excluding DCC Energy) 16.9% driven by strong growth in DCC Technology and DCC Healthcare
- Seasonal increase in working capital to largely unwind in second half
- 10% increase in the interim dividend

Development activity:

- Increased levels of acquisition activity, with £148 million committed on acquisitions year to date
- Agreement reached to acquire Esso SAF Retail for £84 million – completion expected calendar H1 2015
- Completion of the acquisition of Qstar in May 2014
- Acquisition of Williams Medical for £45 million – May 2014
- DCC Technology acquired CapTech – September 2014
- Recent acquisitions performing well
- Agreement reached to dispose of the Irish subsidiaries of DCC Food & Beverage – aggregate consideration of approximately €75 million (£60 million)

Outlook:

- Following the particularly mild weather conditions in September and October, the Group now expects that the year to 31 March 2015 will show growth in operating profit and adjusted earnings per share in the range of 5% - 10% over the prior year (previously approximately 10% - 12%). This guidance continues to be set against the important assumption that there will be normal winter weather conditions in the balance of the Group's financial year.

Highlights

- Six months ended 30 September 2014

	2014	2013**	% change
	£'m	£'m	
Revenue	5,514.4	5,409.7	+1.9%
Operating profit*	73.2	68.8	+6.4%
Profit before net exceptional items, amortisation of intangibles and tax	60.3	58.4	+3.1%
Adjusted EPS*	62.53 pence	58.34 pence	+7.2%
Dividend per share	28.73 pence	26.12 pence	+10.0%
Net debt at 30 September	272.8	216.1	
* Excluding net exceptionals and amortisation of intangible assets ** All comparative numbers have been restated to reflect the impact of new accounting rules for joint ventures			

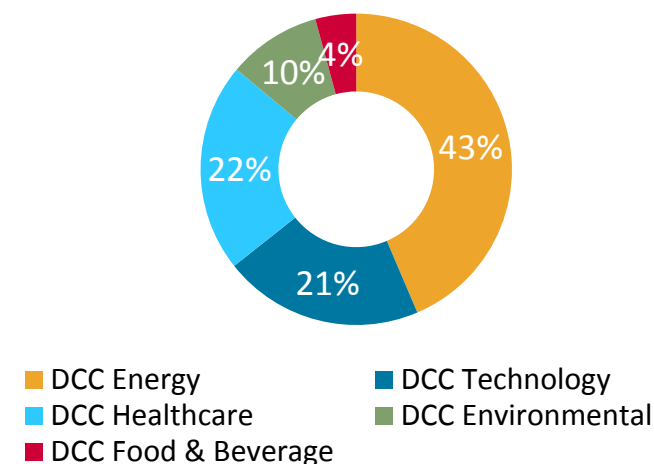
Business Overview: divisional results

- Six months ended 30 September 2014

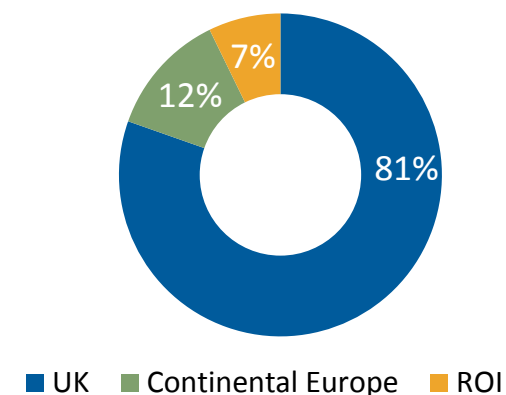
	2014	2013	% change
	£'m	£'m	
Operating profit*			
DCC Energy	31.9	33.5	-4.7%
DCC Technology	15.2	14.1	+7.7%
DCC Healthcare	15.9	12.6	+26.7%
DCC Environmental	7.1	6.3	+11.7%
DCC Food & Beverage	3.1	2.3	+33.3%
Group operating profit	73.2	68.8	+6.4%

* Excluding net exceptionals and amortisation of intangible assets

By Division



By Geography



Acquisition & Capital Expenditure - £184.2m

- Six months ended 30 September 2014

	Acquisitions	Capex	Total
	£'m	£'m	£'m
DCC Energy	85.4	23.5	108.9
DCC Technology	15.5	5.3	20.8
DCC Healthcare	44.6	2.8	47.4
DCC Environmental	-	4.4	4.4
DCC Food & Beverage	2.4	0.3	2.7
Total	<u>147.9</u>	<u>36.3</u>	<u>184.2</u>

DCC Energy

	2014	2013	% change
Volume (Litres)	5.215bn	4.950bn	+5.3%
Revenue	£4,077.0m	£4,093.4m	-0.4%
Operating profit	£31.9m	£33.5m	-4.7%

5.2 billion litres of product sold: volumes +5.3% driven by acquisitions – organically flat

Operating profit was 4.7% behind the prior year - impacted by the very mild weather in contrast to prior year

Organically, operating profit was approximately 15% behind the prior year

Oil

- Significant expansion of the retail business - acquisition of Qstar and anticipated acquisition of Esso SAF Retail
- Good organic growth in non heating segments of the markets in the UK
- The fuelcard business - strong organic volume growth, continued growth of market share in Britain

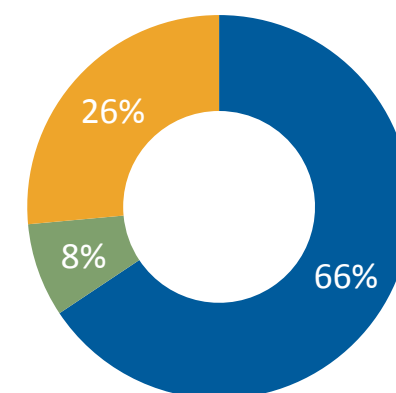
LPG

- Business performed robustly in H1 - good organic volume growth across its commercial segment, this partially mitigated impact of mild weather conditions
- Good cost control and synergies achieved following the integration of the former BP LPG business in Britain

On a pro-forma basis, DCC Energy will sell approximately 12.5 billion litres of product per annum across 10 countries

Business is well positioned to drive further growth in these markets and to continue to expand into new geographies

Volumes by Geography



- Britain
- Ireland
- Continental Europe

DCC Technology

	2014	2013	% change
Revenue	£1,037.9m	£959.3m	+8.2%
Operating profit	£15.2m	£14.1m	+7.7%
Operating margin	1.5%	1.5%	

Operating profit growth of 7.7% in the first half - good growth across the business

UK and Ireland

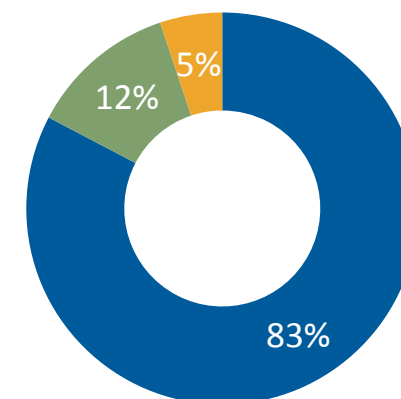
- Maintained position as the leading distributor of IT, mobile and home electronics products into the retail channel
- Areas of developmental focus include wearable technology, consumer electronics and small domestic appliances
- Growth in market for gaming consoles and improved demand for PC products offsetting weaker market for tablets, DVD and audio
- Strong growth from reseller customer base - winning new customers and expanding market share with existing customers
- Commenced programme to upgrade the IT and logistics infrastructure to support the future growth of the business

Continental Europe

- Improved performance in what remains a difficult market
- Acquisition of CapTech completed in September 2014

DCC Technology continues to seek opportunities to expand its presence in other European markets

Revenue Split



- UK & Ireland
- Continental Europe
- Supply Chain Services

DCC Healthcare

	2014	2013*	% change*
Revenue	£236.9m	£189.1m	+25.3%
Operating profit	£15.9m	£11.7m	+35.8%
Operating margin	6.7%	6.2%	

* Adjusted to exclude Virtus Inc which was disposed of in March 2014

Operating profit growth of 35.8%, benefiting from acquisitions and strong organic profit growth in DCC Health & Beauty Solutions

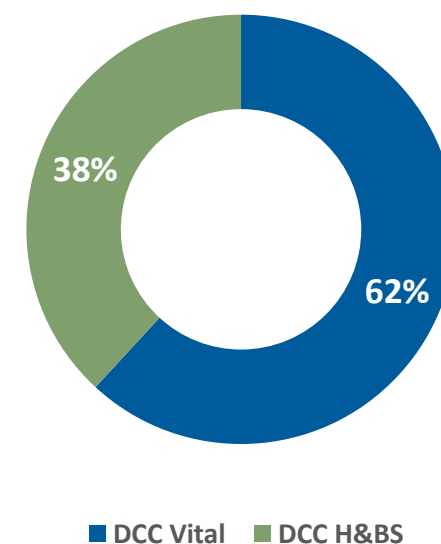
DCC Vital - Strong profit growth driven by acquisition activity

- Williams performed well since acquisition
- Good sales growth in own licence generic pharmaceuticals, particularly in the respiratory area
- Good sales growth in medical devices following the acquisition last year of Leonhard Lang UK
- In Ireland trading environment remained challenging, particularly pharma compounding

DCC Health & Beauty Solutions - Very strong operating profit growth

- Nutrition - benefited from integration of Swedish tablet manufacturing operations into DCC's larger tablet manufacturing facility in Britain
- Process of combining UPL with DCC Health & Beauty Solutions' existing creams and liquids activities on track to deliver the targeted commercial benefits and cost savings

Gross Profit Split (pro forma)



DCC Environmental / DCC Food & Beverage

DCC Environmental	2014	2013	% change
Revenue	£73.6m	£64.9m	+13.3%
Operating profit	£7.1m	£6.3m	+11.7%
Operating margin	9.6%	9.7%	

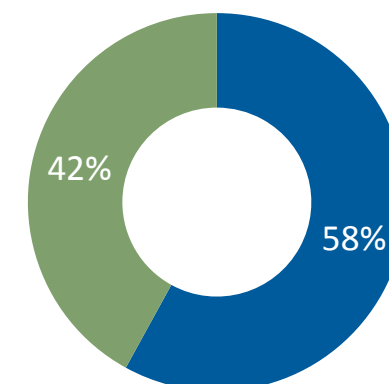
DCC Environmental: Operating profit increased by 11.7% on the prior year

- Well positioned to benefit from improved market conditions, helped by more favourable economic backdrop and some consolidation within the market
- The non-hazardous business benefited from lower disposal costs for non-recyclable waste while Scottish hazardous waste business has won some significant new contracts

DCC Food & Beverage	2014	2013	% change
Revenue	£89.0m	£97.1m	-8.3%
Operating profit	£3.1m	£2.3m	+33.3%
Operating margin	3.5%	2.4%	

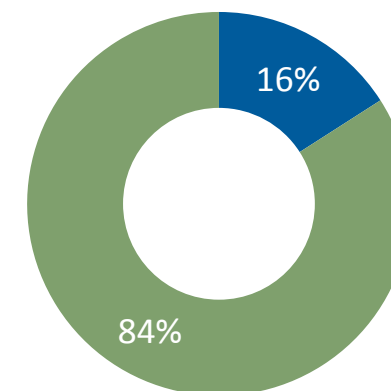
DCC Food & Beverage: Operating profit increased by 33.3% on the prior year primarily driven by a strong performance in the wine business in Britain and Ireland

Revenue Split



■ Non hazardous waste ■ Hazardous waste

Revenue Split



■ Britain ■ Ireland

Revenue/Gross Margin/Operating Costs

	2014 Revenue (£m)	Change	2014 Gross Margin	Change	2014 Operating costs (£m)
DCC Energy	4,077	-0.4%	4.20ppl	-0.20ppl	187
Group excl. DCC Energy	1,437	+9.2%	12.4%	+0.3%	137
Total	<u>5,514</u>	+1.9%			<u>324</u>

- Energy volumes up 5.3% (flat organically)
- Average selling price down 5.4%, primarily due to oil price and mix
- Revenue excluding DCC Energy up 9.2%, up 5% organically (driven by DCC Technology in Britain)
- DCC Energy gross margin 4.20ppl (2013: 4.40ppl)
- Group excluding DCC Energy gross margin of 12.4% (2013: 12.2%) – mainly mix
- Operating costs up £15m (acquisitions +£30m, organic -£7m, currency -£8m)
- DCC Energy operating costs of 3.59ppl down from 3.72ppl, driven by mix and efficiencies
- Excluding DCC Energy, operating costs as a % of revenue unchanged at 9.5%

Summary Group P&L/ Operating Cash Flow

	2014 (£m)	2013 (£m)	Change (£m)	Change (%)
Operating Profit	73	69	+4	+6.4%
Finance Costs	(13)	(11)	+3	
Profit before net exceptional items, amortisation of intangible assets and tax	60	58	+2	+3.1%
Effective Tax Rate	13%	16%		
Operating Cash Flow	18	110	(92)	

- Excluding DCC Energy, operating profit growth of 16.9% - approximately one third organic and two thirds acquisitions
- Finance costs increase primarily due to the hold cost on the 2014 PP drawdown
- Tax rate reduction from the FY2014 rate of 14% mainly due to mix of tax rates with the UK rate falling
- Seasonal increase in net working capital days to 2.3 days (1.8 days 2013) which should reduce in second half. Debtor days down to 29.3 from 33.1 at 30 September 2013
- Net working capital at 30 September was £74m

DCC's Strategy

Our Objective:

To continue to build a growing, sustainable and cash generative business which consistently provides returns on total capital employed significantly ahead of its cost of capital

Our strategic priorities:

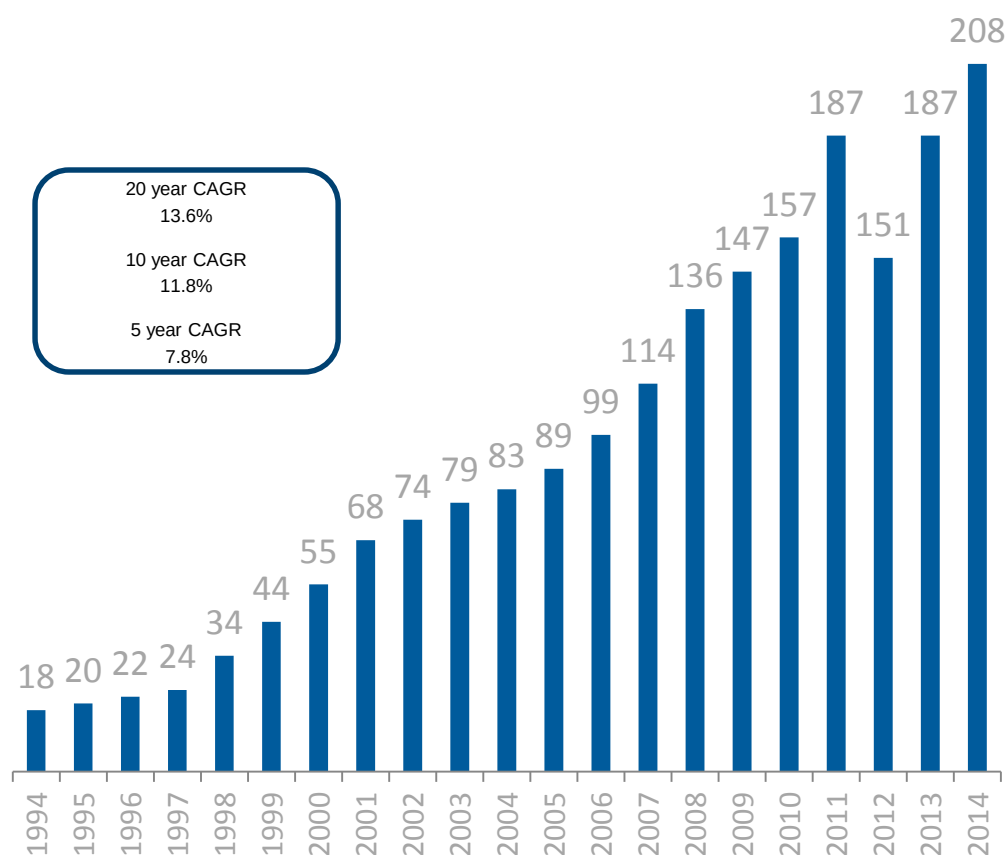
- Creating and sustaining leading positions in each of the markets in which we operate
- Continuously benchmarking and improving the efficiency of our operating model in each of our businesses
- Carefully extending our geographic footprint to provide new horizons for growth
- Attracting and empowering entrepreneurial leadership teams, capable of delivering outstanding performance, through the deployment of a devolved management structure
- Maintaining financial strength through a disciplined approach to balance sheet management

Outlook for year to 31 March 2015

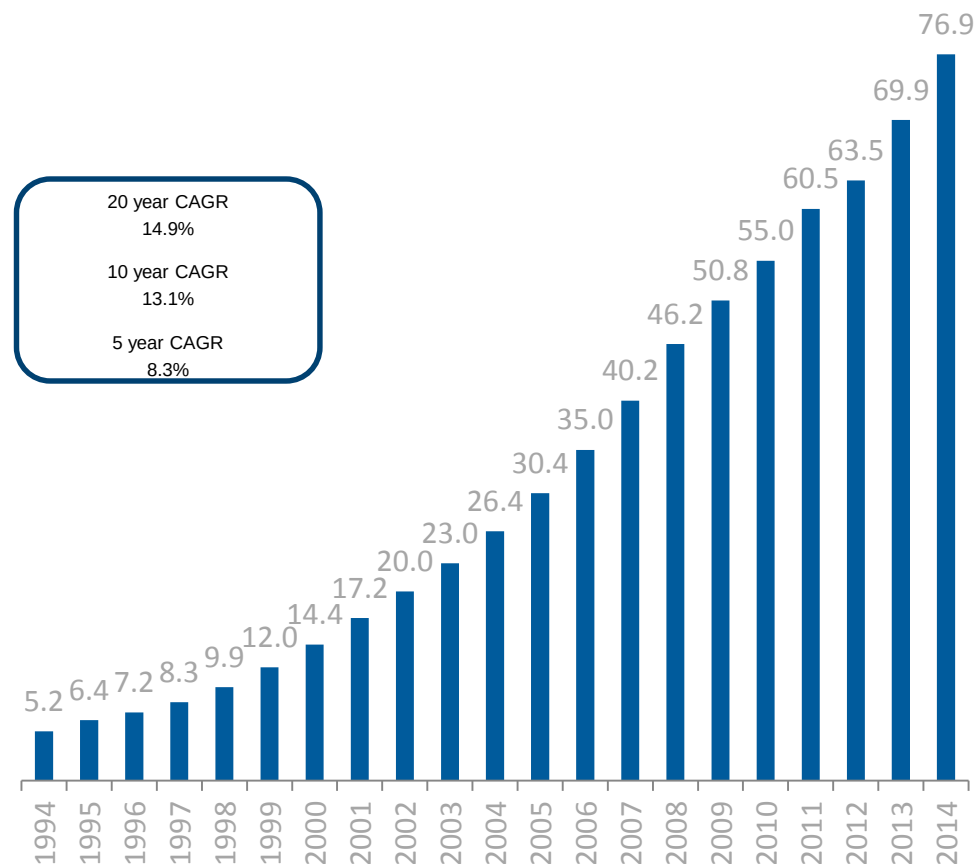
Following the particularly mild weather conditions in September and October, the Group now expects that the year to 31 March 2015 will show growth in operating profit and adjusted earnings per share in the range of 5% - 10% over the prior year (previously approximately 10% - 12%). This guidance continues to be set against the important assumption that there will be normal winter weather conditions in the balance of the Group's financial year.

The strategy continues to deliver results for the long term

Strong operating profit growth (£'m)



Consistent dividend growth (pence)



Years ended 31 March
(pence sterling – 1994 to 2013 translated at FY13 average FX rate)

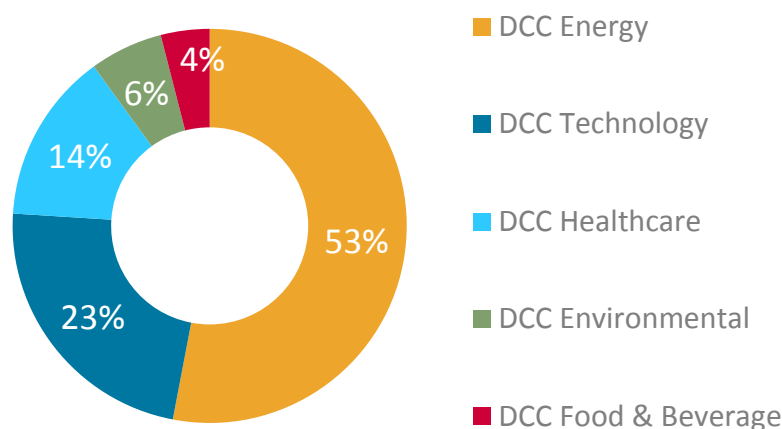


Appendix: Company Overview Presentation

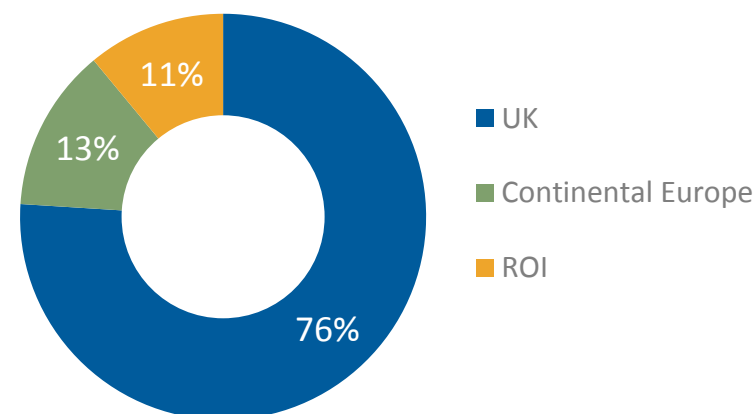
DCC

DCC is an international sales, marketing, distribution and business support services group operating across five divisions

Profit by division*



Profit by geography*



- Listed on the London Stock Exchange since 1994
- FTSE 250 (support services) since June 2013
- Market Capitalisation of c. £3 billion
- Employs approximately 10,000 people
- Operating in 13 countries

DCC – Financial Highlights*

Revenue	£11.2bn	ROCE	16.3%
Operating Profit	£208m	Net debt/EBITDA	0.3x
Operating Cash flow	£349m	Interest cover (times)	12.4x

* Year ended 31 March 2014

Long History of EPS Growth...

EPS (£ pence)

20 year CAGR *

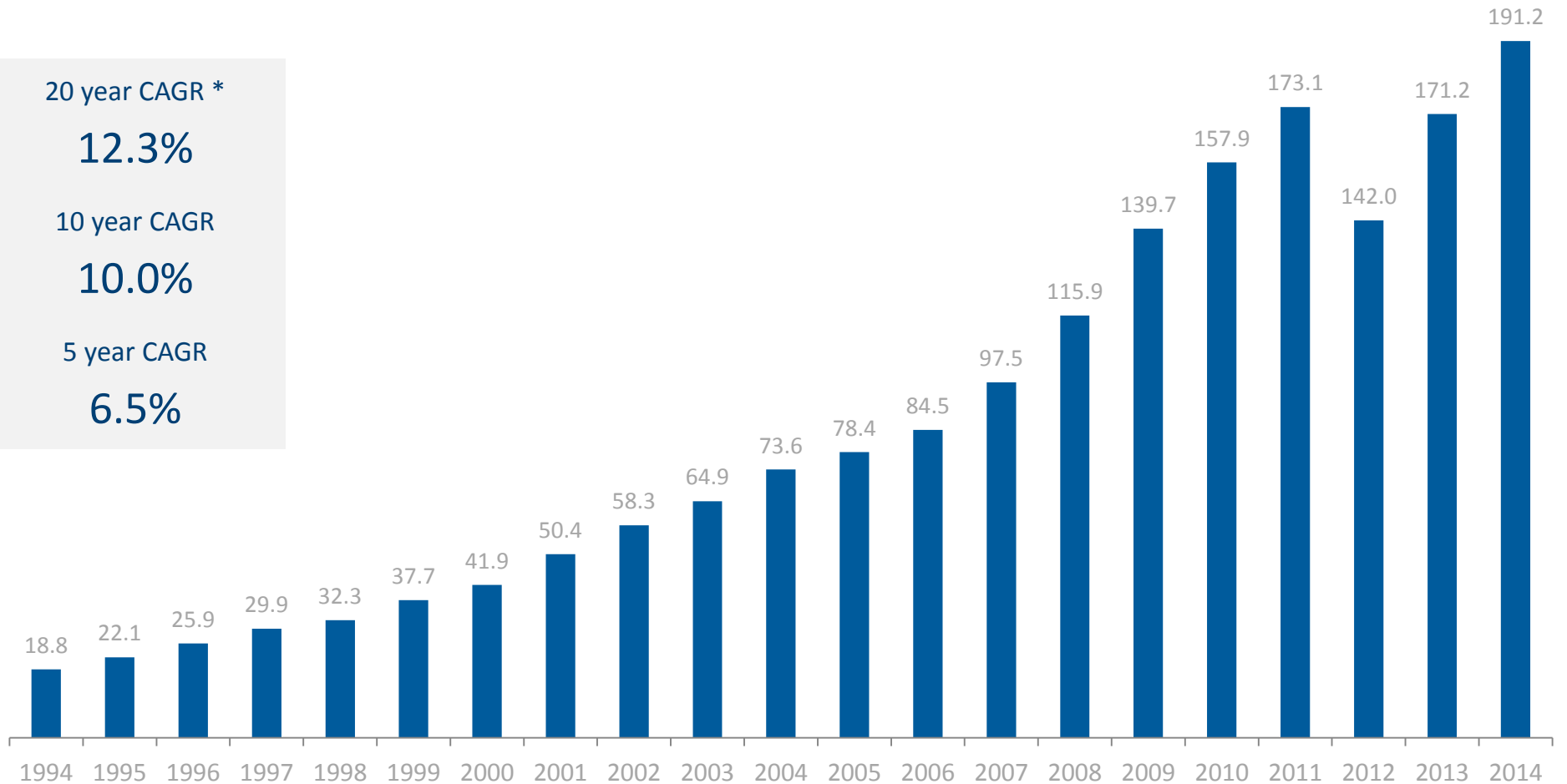
12.3%

10 year CAGR

10.0%

5 year CAGR

6.5%



Years ended 31 March
(£m – 1994 - 2013 translated at FY13 average FX rate)

* since flotation in 1994

...with Strong Cash Flow Generation which Supports Development Activities

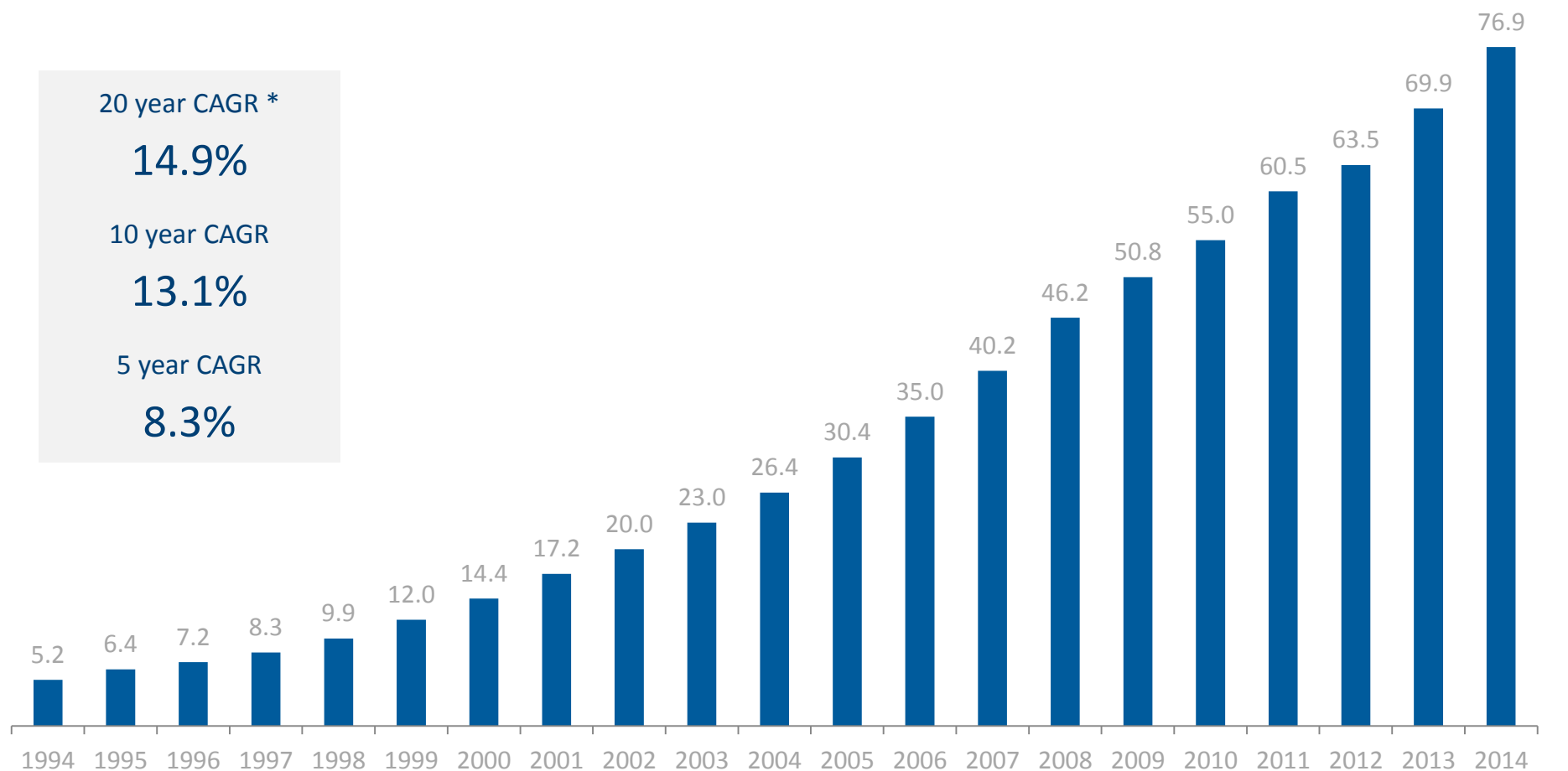
1 April 1994 – 31 March 14	£m	20 Year CAGR
Operating profit	1,968	13.2%
Decrease in working capital	112	
Depreciation	554	
Other	(39)	
Operating cash flow	2,595	13.8%
Capex	(636)	
Free cash flow	1,959	14.0%
Interest and tax	(414)	
Free cash flow after interest and tax	1,545	
Acquisitions	(1,258)	
Disposals / exceptionals	200	
Dividends / share buybacks	(614)	
Share issues	64	
Translation and other	(21)	
Net cash outflow	(84)	
Opening net debt	(2)	
Closing net debt	(86)	

- Free cash flow of £2.0bn
- Free cash flow* conversion of 100% and CAGR of 14.0%
- Revenue increased from £0.2bn to £11.2bn
- Operating profit increased from £18m to £208m. CAGR of 13.2%
- £112m working capital inflow
- Capex exceeded depreciation by £82m
- Acquisition spend of £1.3bn
- Dividend / share buybacks of £0.6bn
- All financed from cashflow
- Average maturity on debt is 8 years, including recent fundraising

* Operating cash flow after capex

...along with Consistent Dividend Growth

Dividend Growth (pence sterling)



Years ended 31 March
(pence sterling: 1994 - 2013 translated at FY13 average FX rate)

* Since flotation in 1994

DCC's Strategy

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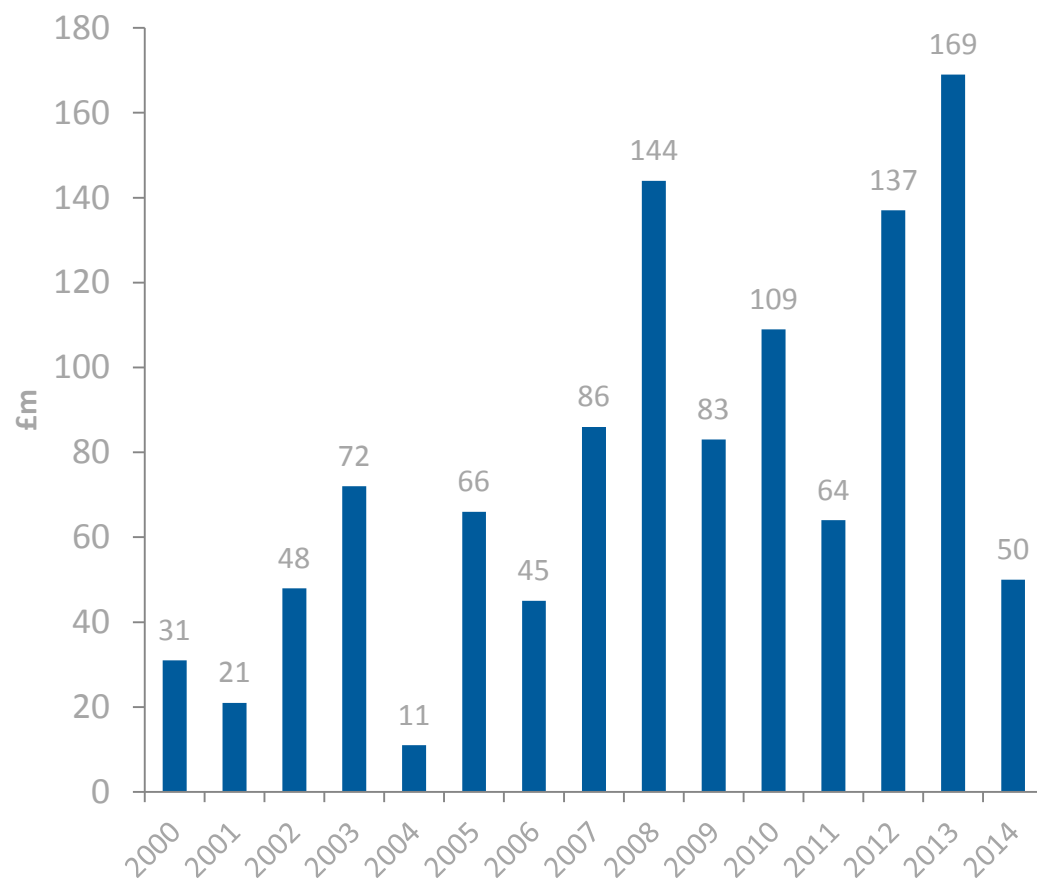
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Leading Market Positions

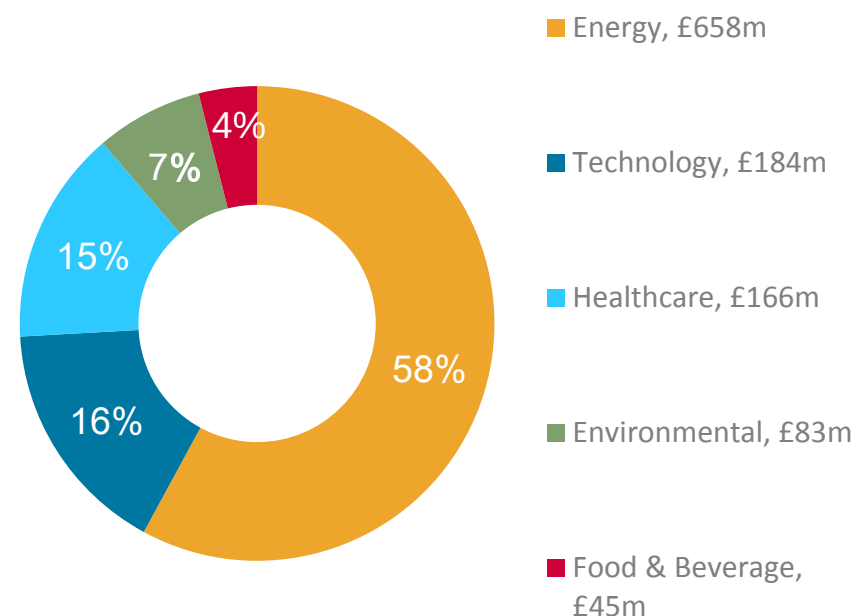
Division	Market Positions
DCC Energy	• # 1 oil distributor in Britain with 18% of the market (the next largest competitor has c. 3%) • # 1 independent oil distributor in Sweden (18% market share) • # 2 oil distributor in Denmark (12% market share) and Austria (12% market share) • # 1 (joint) LPG distributor in the Netherlands (27% market share) • # 1 LPG distributor in Sweden and Norway (49% and 47% market share respectively) • # 2 LPG distributor in Britain and Ireland with market shares of c. 28% and 40% respectively
DCC Technology	• # 2 technology distribution in Britain • # 1 technology distribution in Ireland • # 7 technology distribution in France • # 4 technology distribution in Europe
DCC Healthcare	• Leading player in sales, marketing and distribution of pharma products and medical devices in Britain and Ireland, with # 1 position in Ireland • Leading provider of outsourced solutions to the European health and beauty sector (soft gels and tablets), with # 1 position in Britain and market share of 30%
DCC Environmental	• # 1 recycling and waste management business in Scotland (and top 10 in Britain)
DCC Food & Beverage	• # 1 in ambient health foods in the Republic of Ireland

Acquisitions

Cash spent on acquisitions



By Division



15 Year Total: £1.1 bn

- Spent £1.3bn on acquisitions since flotation in 1994
- Disposals net of exceptionals yielded £0.2bn

All prior year numbers translated at FY13 average FX rate



The Business: By Division

DCC Energy

(53% of FY 2014 Group Profit)

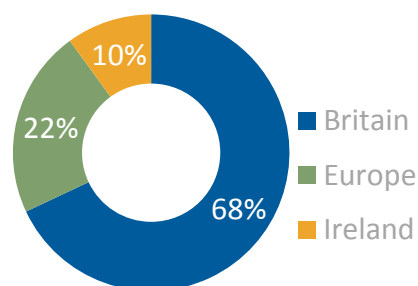
DCC Energy is the leading oil and liquefied petroleum gas (“LPG”) sales, marketing and distribution business in Europe

- Oil for transport, heating and industrial / agricultural processes
- LPG for heating, cooking, transport and industrial / agricultural processes
- Established market leadership positions in 7 countries with a platform to grow the business across Europe and beyond
- Over 30 years industry experience
- Consolidator of fragmented markets
- Partner of choice for oil majors in asset divestment
- Recurring revenue, cash generative and high ROCE business
- Product Split:
 - Road transport – 48%
 - Commercial fuel – 19%
 - Heating oil – 20%
 - LPG – 13%

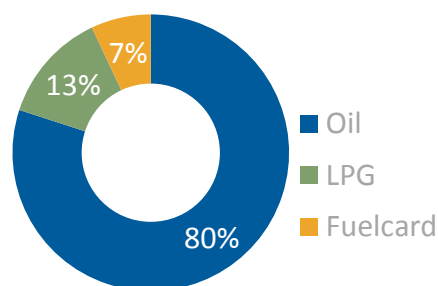
	FY 2014
Revenue	£8,243.7m
Operating profit	£110.5m
ROCE	17.5%

10-Year Operating profit	£754m
CAGR	13.4%
10-Year Operating cash flow	£1,106m
CAGR	11.4%
10-Year Free cash flow	£840m
CAGR	10.9%

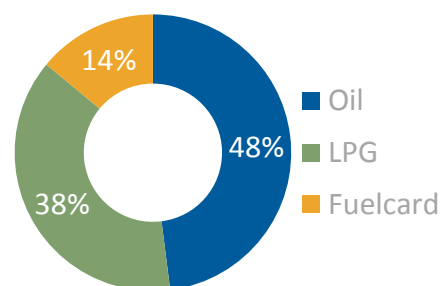
Volumes by geography



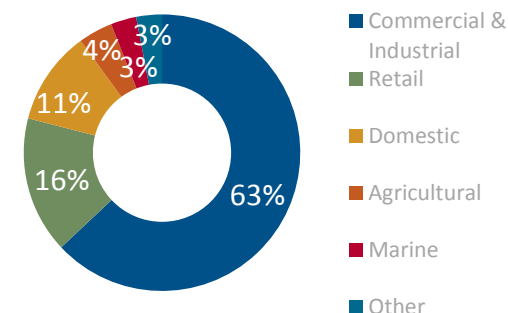
Volumes by sector



Profit by sector



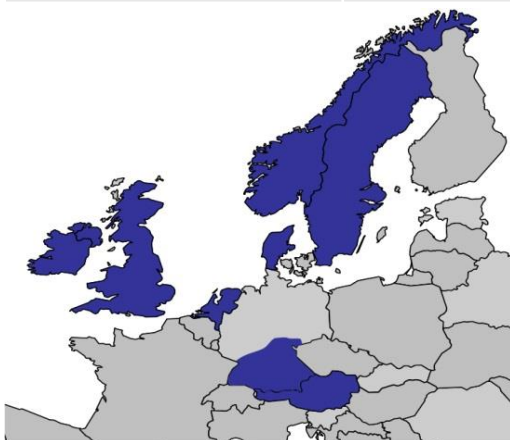
Customer Split



DCC Energy – Business of Scale

Geography	Volume	Market Share	Market Position
Britain – oil	c. 6,350mL	c. 18% – oil	# 1
Britain – LPG	c. 260kT	c. 28% – LPG	# 2
Ireland – oil	c. 900mL	c. 11% – oil	# 5
Ireland – LPG	c. 70kT	c. 40% – LPG	# 2
Austria & Germany – oil	c. 750mL	c. 12%	# 2
Sweden – oil bulk	c. 375mL	c. 18%	# 1
Sweden – oil retail	c. 300mL	c. 4%	# 5
Sweden – LPG	c. 170kT	c. 49%	# 1
Norway – LPG	c. 90kT	c. 47%	# 1
Denmark – oil	c. 250mL	c. 12%	# 2
Netherlands – LPG	c. 70kT	c. 27%	# 1 (jt)

Business Statistics (FY 2014)		
Volumes	c. 12.5 billion Litres (pro forma annualised including acquisitions announced)	
Customers	c. 1 million	
Trucks	c. 2,100	
Employees	c. 4,700	
Facilities	360	
Retail petrol sites operated/supplied	Britain: 1,600 Sweden: 400 Ireland: 100	France: 400 Austria: 250



DCC Energy – vision & strategy

DCC Energy's vision is to be a global leader in the sales, marketing and distribution of fuels and related products and the provision of services to energy consumers:



Oil

- Continue to consolidate existing markets to drive greater customer density
- Expand sales of differentiated products
- Cross sell add-on products and services e.g. Fuel Cards, Lubricants
- Optimise and build greater flexibility into logistics operations
- Expand into new geographies



LPG

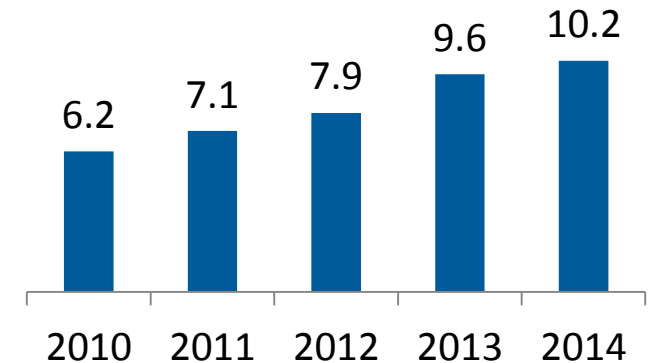
- Leverage synergies from recent acquisitions
- Target oil to LPG conversions
- Targeted market share gains, particularly commercial bulk
- Expand into new geographies



Retail

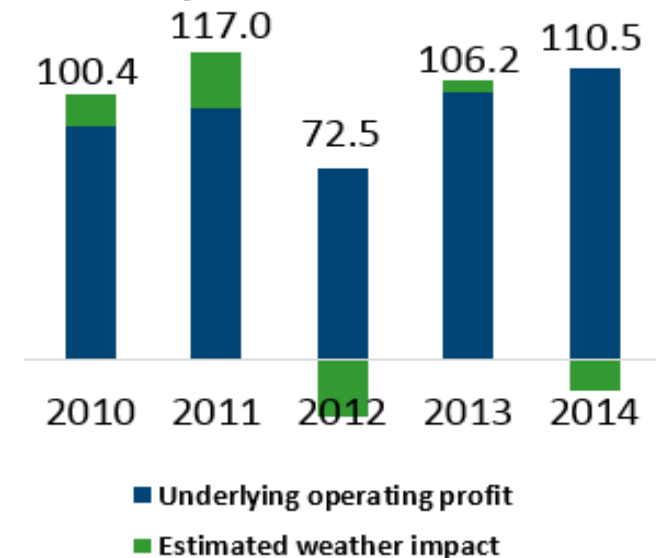
- Expand business in the retail petrol station market
- Continue to grow market share in the Independent Dealer (DoDo) market
- Invest in and operate unmanned/bunker sites

Volumes (Billion litres)



Operating Profit (£m)

5 year CAGR: 5.8%



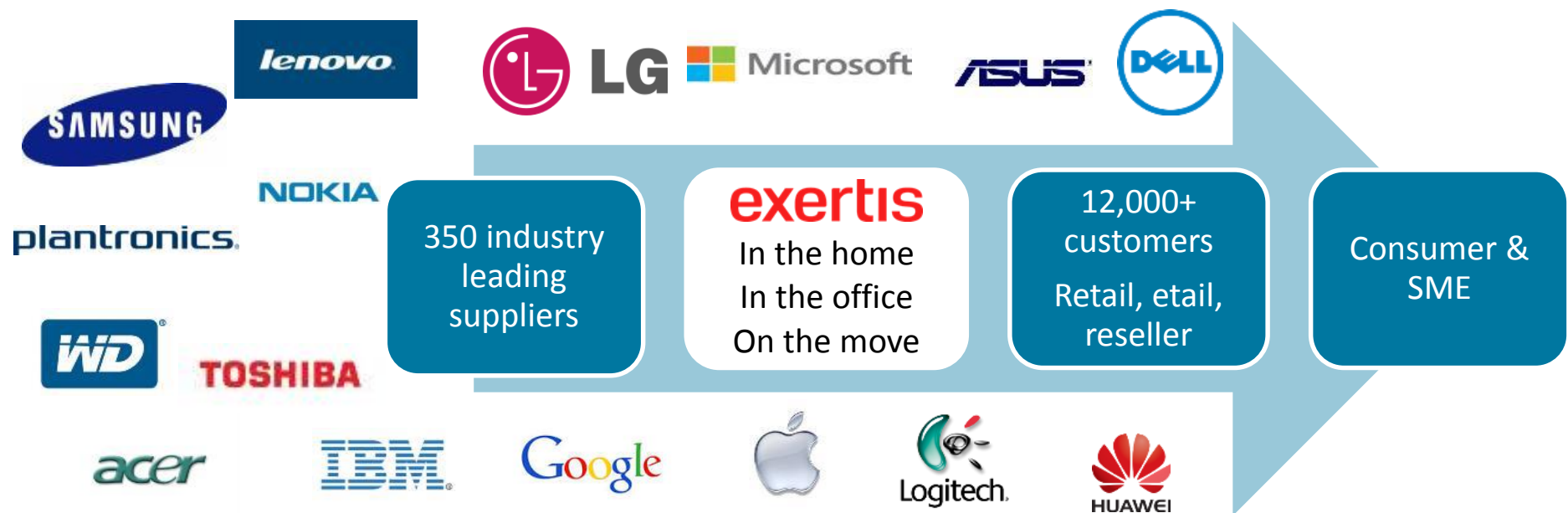
DCC Technology

(23% of FY 2014 Group Profit)

Leading route-to-market partner for global consumer and SME technology brands

	FY 2014
Revenue	£2,264m
Operating profit	£48.1m
ROCE	21.1%

DCC Technology operates under the **exertis** brand



DCC Technology provides a full range of services to our supplier and customer partners, delivering an exceptional route-to-market for a broad range of innovative products

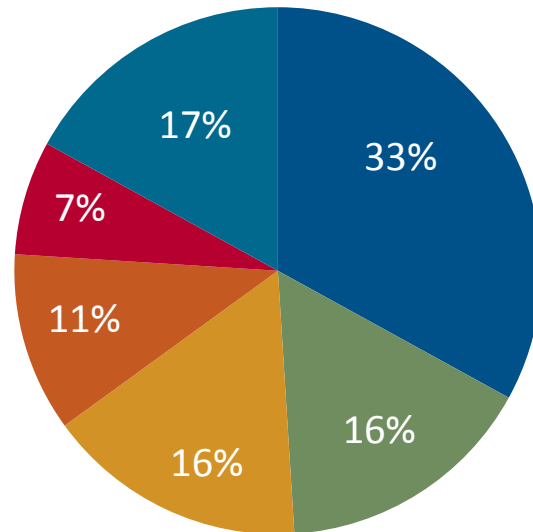
Technology Distribution – Integral part of the supply chain

- Technology distribution represents c. 22% of the global ICT market
- Allows suppliers to concentrate on core activities including product development and end user marketing
- How **exertis** delivers value for partners:
 - for **Suppliers**
 - Ability to manage complex demands of diverse range of customers, from large retailers and etailers to very broad range of small local resellers, managing everything from in-bound logistics to end-user marketing
 - Pro-active and dedicated sales and marketing teams to drive new retailer / reseller recruitment
 - Supply chain services, including kitting for specific customers, customisation and localisation services, hubbing of stock, bundling of products and management of returns
 - for **Customers**
 - Product and category expertise, including in-store product positioning and marketing
 - End-user fulfilment and white-label services, including own-brand product sourcing, web site management and digital distribution
 - Product life cycle management, acting as a 'centre of excellence' to identify and introduce emerging technologies and services

DCC Technology – leading route to market partner

Products

- Computing (including PC's, servers, tablets)
- Communications
- Printers, consumables and IT peripherals
- Gaming consoles, peripherals and software
- Consumer electronics



Market

DCC Technology	Geography	Market Position
exertis - In the home - In the office - On the move	Britain	No. 2
	Ireland	No. 1
	France	No. 7
	Sweden	No. 3
	Holland	Niche
	Total Europe	No. 4

Suppliers

- Excellent supplier portfolio with very broad product line up
- Strong market shares with strategic suppliers
- Breadth of suppliers allows access to all new and emerging technology

Customers

- Superb reach across retail and reseller channels



DCC Technology – vision & strategy

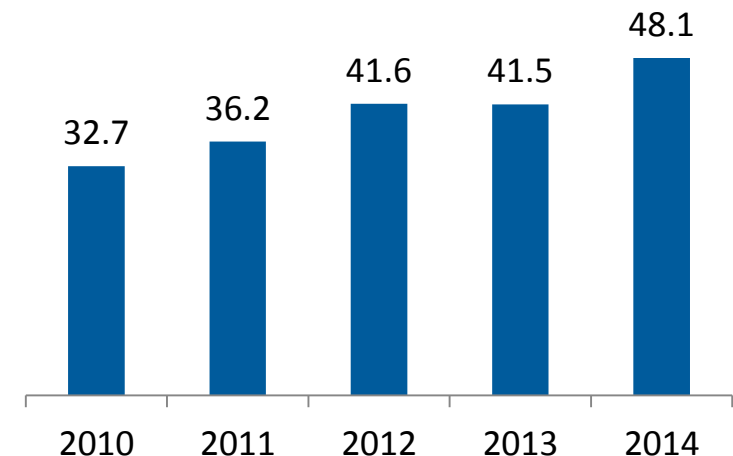
DCC Technology's vision is to be the leading European route to market and supply chain partner for global consumer and SME technology brands

- Delivering an industry-leading service offering
- Generating high levels of ROCE
- The obvious partner for a new supplier to access European retail and SME markets

Strategy

- To broaden the range of sale channels and products addressed by the business in its existing markets, including emerging technology segments
- To develop and deliver a range of Industry leading services supported by best in class infrastructure
- To extend the geographic of the business in Continental Europe through complementary acquisitions

Operating Profit (£m)
5 Yr. CAGR 10.6%



Excluding DCC Technology's Enterprise distribution business which was disposed of in June 2012.



DCC Healthcare overview

(14% of FY 2014 Group Profit)

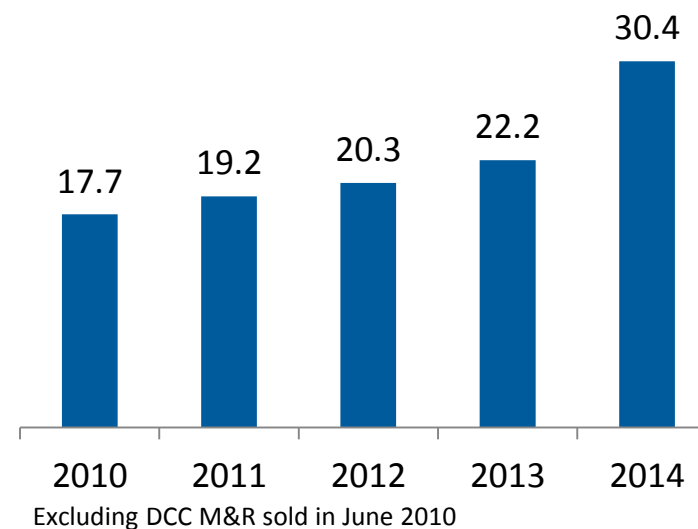
Sales, marketing and distribution of pharmaceuticals and medical devices and provision of services to health & beauty brand owners

- Well positioned to benefit from market dynamics
- Strong market positions in Britain and Ireland across all sectors
- Growing European Health & Beauty business
- Platform for international growth in pharma

	FY 2014
Revenue	£406.5m
Operating profit	£30.4m
ROCE	14.2%

Operating Profit (£m)

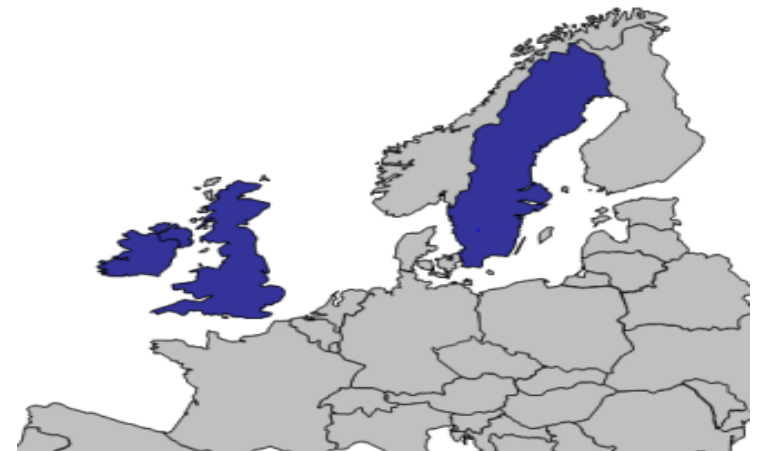
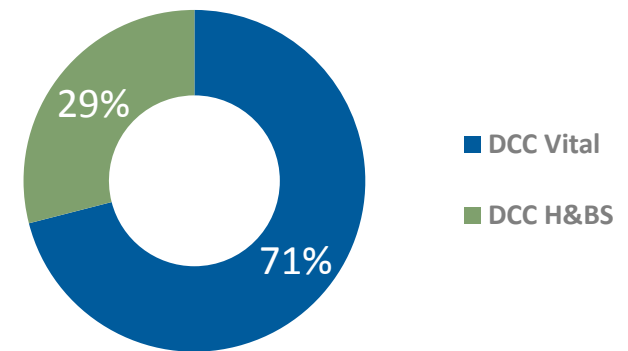
5 Yr. CAGR 19.1%



DCC Healthcare overview – Our Business

- Most comprehensive sales & distribution network for pharmaceuticals and medical devices in Britain and Ireland, including
 - #1 in hospital supplies in Ireland
 - #1 in GP supplies in Britain
- One of Europe's leading outsourced service providers to the Health & Beauty sector, including
 - #1 contract manufacturing service provider in Britain

Revenue Split
FY 2014



DCC Healthcare – vision & strategy

DCC Healthcare's vision is to build a substantial European healthcare business principally focused on sales, marketing and distribution of pharmaceuticals and medical devices and provision of services to health & beauty sector brand owners

- With strong local market shares
- Generating high levels of ROCE
- Expanding into new geographies

Strategy

DCC Vital

- Focus on organic growth in Britain and Ireland leveraging the benefits of recent acquisition activity:
 - Bolt on acquisitions in Britain – businesses and products
- Build presence in selected European markets over time

DCC Health & Beauty Solutions

- Continued focus on organic growth with existing customers across Europe
- Expand customer base, geographic penetration and service offering, organically and by acquisition

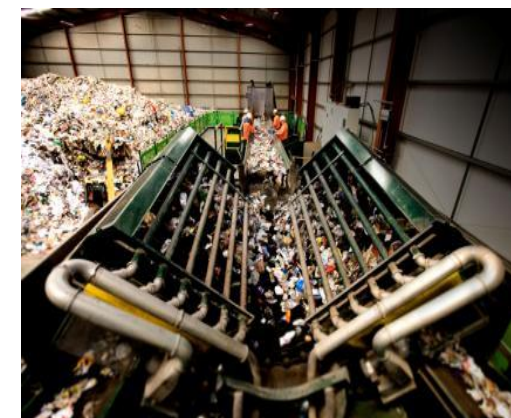
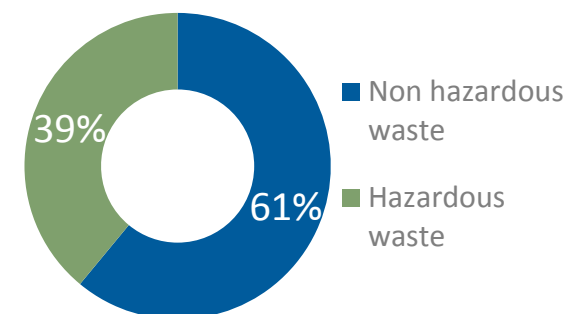
DCC Environmental – our business

(6% of FY 2014 Group Profit)

Geography	Market Position
Ireland	# 1 hazardous waste management business
Britain	A leading recycling, waste management and resource recovery business – market leading positions in non hazardous waste in Scotland and the East Midlands region and national hazardous waste collection and processing infrastructure

	FY 2014
Revenue	£130.6m
Operating profit	£11.7m
ROCE	8.6%

Revenue Split

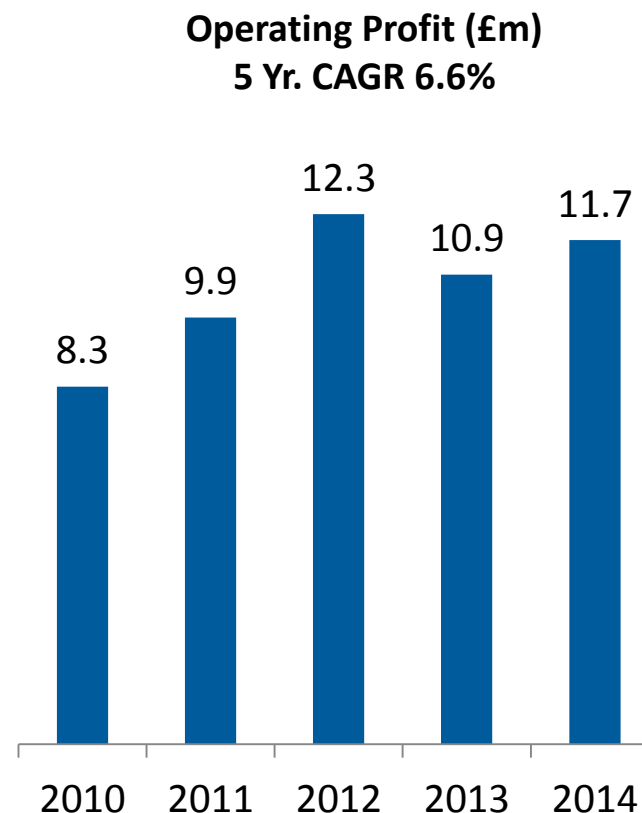


DCC Environmental – vision & strategy

DCC Environmental's vision is to continue to build on its market position as one of the leading providers of recycling, waste management and resource recovery services in Britain and Ireland

Strategy

- Position the business to take advantage of the trend towards more sustainable waste management, with a particular emphasis on resource recovery and recycling
- Deliver superior value adding services to all its customers by way of a deep understanding of its customers' requirements and the development of innovative solutions to their problems
- Aligning its business to support the transition to both a low carbon and circular economy through a focus on resource rather than waste, developing internal climate change expertise and continually improving its recycling capability



DCC Food & Beverage* – our business

(4% of FY 2014 Group Profit)

Category	Market Position		FY 2014
Healthy Foods	# 1 in ambient healthy foods in ROI	Revenue	£186.9m
Wine	# 1 independent wine distributor in Ireland Strong position in off trade in UK	Operating profit	£7.7m
Logistics	Leading frozen and chilled logistics in ROI	ROCE	11.8%

DCC Food & Beverage is principally focused on the sales, marketing and distribution of food and beverage products in Ireland and on catering and hospitality services through a joint venture company.

