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There's a Wolf in Wicklow – and It's Leading the Pack!

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Introduction

As I drove into the quaint seaside town of Bray on a brisk autumnal morning to meet Simon Lynch, co-founder of The Wicklow Wolf Brewery, I was aware that there was something changing in the behaviour of beer drinkers in Ireland. As a consumer behaviour academic, I have always been interested in phenomena that fundamentally change consumption behaviour, for example TV in the 60's and 70's, video in the 80's, the internet and of course German discounters in the 90's and noughties. But I just wasn't aware that the consumer behavioural change toward beer in Ireland was coming down the tracks like a freight train in the form of 'craft beer', and this was knocking a lot of the bigger mass producers out of the way. According to the 2016 report for the Independent Craft Brewers of Ireland and Bord Bia it is estimated that there are some 90 microbreweries operating in the Republic of Ireland, of which 62 are production microbreweries and at least 28 are contracting companies. There has been a 29% increase in the number of production microbreweries from 48 in 2015 to 62 in 2016. The number of microbreweries has more than quadrupled since 2012 and the total turnover of craft beer producers in 2015 is estimated at €40m and at the time of report projected at €59m for 2016. In the five years since 2011, turnover has increased eleven-fold in the industry.

Wicklow Wolf is a major brand force in the industry; it was founded in 2014 by Quincey Fennelly and Simon Lynch - two ordinary guys driven by a passion to create high quality craft beer and to build an Irish craft beer brand. Simon is a horticulturist by profession and grows hops on their own hop farm in Roundwood and Quincey is an avid homebrewer/brewer with a background in the drinks business. Sitting in the brewery's tap room, I begin the interview with Simon who is proudly wearing a Wicklow Wolf t-shirt.



AM: Many thanks for agreeing to see me, Simon.

SL: You are very welcome, Alan.

AM: I have about 20 questions to ask you that I feel are relevant to the brand, the market and your business today. To start the interview maybe you could give me an overview of the company, how did you enter the craft beer industry, when did you start etc.....

SL: Myself and my business partner Quincey met through our kids in school as both are in the same class. We both discovered after meeting that we had an appreciation of good food and wine and good craft beer. We both spent time separately in San Francisco and for me this is where I discovered and sampled my first craft beers, for example Sierra Nevada, Anchor Steen breweries, and from the mid 90's I really loved craft beer.

Moving on to recent times, about 4 to 5 years ago I began helping Quincey with his home brewing and over the kitchen table after drinking plenty of beer we started discussing the idea of commercially brewing our own brand of craft beer.

Before we went down any road of development we began to do research into the craft beer industry in the UK and the USA and then began looking at the home market in Ireland. When we examined the market in Ireland we felt that at that time the quality of craft beer available to the Irish consumer wasn't great albeit this has improved overall since then. There was also a huge opportunity as there was a revolution coming across the Atlantic and we felt that we could catch this wave as we were passionate about the whole concept of delivering a quality beer to the market.

After some basic research in the USA and in particular in Colorado, we got some funding and we started a 'Food Works' programme with Bord Bia, Enterprise Ireland and Teagasc which was an absolutely super programme. They made us look at everything in depth, made us look at it again, and then made us do our business plan a couple of times until both they and us felt it was the right one in terms of helping us to get started. Really, these organisations were excellent and we were awarded HPSO status.

AM: Why Teagasc, Simon?

SL: Because Teagasc is an agricultural body providing advice and research. They also do a lot of testing on food for nutrients, calories and other areas as food and beverage companies need food tasting done, and this is a great service which they provide.

So, after all this work we produced our first beer here at this brewery in Bray in September 2014 – it was American Amber – and it was from here we just went from strength to strength.

Through the 'Food Works' programme we were introduced to a guy called Nick Kelly from a band called 'The Fat Lady Sings' and Nick introduced us to Cathal O'Flaherty, who does all our art work and brand visuals.

AM: Oh, yea, I remember that band – he has an incredible voice.

SL: Yes, he has an incredible voice and he's a very intelligent guy – we were very impressed by him – Nick Kelly did the copy on the bottle for us – this is the story behind the brand – Nick is very active in the advertising industry and has done work for some other companies in the industry.

AM: Where did the brand name come from?

SL: It's very simple, myself and Quincey are luddites when it comes to technology, and I said to Quincey one of those nights around the table when we drank lots of beer (*laugh!*), "What name would we use if we were to go with this project, I wonder could we have a Wicklow-type website with www.ww.ie as this would be a handy one to remember as the Wicklow registration plates are WW?" (*Simon laughs out loud*).

I started looking at different ideas and I discovered that Cromwell, when he came over to Ireland in 1600's, wanted to rid Ireland of the Gael, the priest and the wolf. The wolf had been exterminated in the UK 200 years before when Cromwell arrived and the last wolf in Ireland was killed, with a bounty on its head, on the Wicklow/Wexford border in 1768. I suppose the wolf is a metaphor for us for the reintroduction of a craft that had been exterminated/suppressed by the big breweries like Guinness. Guinness started buying up all these small breweries until there was none left and only them producing beer in Ireland.

There was at one point in time 168 breweries in Ireland. This was at a time when it was often safer to drink beer than it was to consume water as a lot of the water sources were contaminated and, because no pathogens can survive in alcohol, beer was a safer bet!

Also, the wolf is a pack animal and we were trying to create our own pack. One of the most important points about the brand name origin is around the fact that I am a horticulturist who refers to plants by their Latin name – The hop plant's Latin name is Humulus Lupulus and hops are an integral part of the brewing. The Latin for wolf is lupus! Therefore - lots of different reason why the wolf name works for us.

AM: Taking the brand name now: How important is the Wicklow Wolf brand name and how important is it having a brand name in the craft beer industry?

SL: I think it is very important – when we went through the food works programme our mentor was concerned about the name; although Wicklow is our base and it is where we hale from, there was a concern if the brand name Wicklow Wolf would travel. Now, our opinion was that it would travel. If you look at "Galway Hooker" one of the well-established breweries, they were selling their beer outside Galway, in Dublin for example. We felt that Wicklow as a name would travel. People see Wicklow as the Garden County, a very picturesque place. Also, we said that there would be no GAA rivalry from other counties as Wicklow has no real challenge with football or hurling.... (Simon laughs). The brand name is very important for us because there is a lot of noise from the industry.

AM: Yes, it's a very busy industry.

SL: Yes, very busy! That's why having a brand name and more importantly a brand image that stands out from the pack. What we have done with the brand is to make our products very recognisable. We deliberately change the colours on our bottle labels for each product we market so that when they are on a shelf they stand out and create more of a presence. The brand name is also important because it informs the customer that we have a base in Wicklow and that we use as much local materials and ingredients as possible - thus the brand name roots us to Wicklow.

We also examined the spelling of the name Wicklow and it is spelled and pronounced phonetically, so for example in the American market, the consumer over there will be able to say the name Wicklow and understand it as it is spelled, then really this means that the brand can travel outside of Ireland.





AM: Are you looking at internationalising the brand?

SL: Yes, we are in the process of developing export markets. We are going through an export drive with Bord Bia now. We are examining European markets such as France, Italy, Spain, Switzerland and Scandinavia. We are also targeting specific areas within the US, the first being Boston. This is quite a specific drive focused on Boston in the US, as we feel that this is a wonderful place for an Irish brand to start because of the diaspora, and we would hope that the brand would spread from there.

AM: Is Wicklow Wolf available on draught?

SL: Yes, it is - we are currently stocked in approximately 160 pubs, mainly in the Leinster region, but also around the country as well.

AM: What about the off-licence trade?

SL: The brand is stocked in 550 off-licences nationwide, including independent off-licences. We are centrally stocked in SuperValu and of course the O'Brien's off-licence chain. We are the number one selling craft beer in O'Brien's for the last year and a half (*Simon says this with pride!*).

AM: How did the business grow from a standing start?

SL: We got huge help from my wife who has a financial background. She helped us formulate our financial business plan and see what was achievable. I am a qualified horticulturist and my business partner Quincey is a qualified baker and brewer and has a background in marketing in the drinks industry – he worked in C&C and he started in Ballygowan as a start-up with six people. He also worked with United Beverages. So really Quincey had a very good relationship with the on and off trade. Through his experience, he set sales targets based on his experience as to what was achievable.

With this experience we could put together a realistic business plan and we have developed very good relationships which have brought good investors to the table – investors who brought real added value – not just their money.

We have just closed a second round of funding and we have been offered a serious amount of cash to expand the business in a different direction. These investors wanted to drive volume whereas we wanted to drive quality, because for us it is more important to drive the quality first, develop the brand in the marketplace and then drive the volume in a way that won't compromise the quality or the brand.

AM: That's interesting, Simon – I think in the craft beer industry quality is a huge brand attribute. Regarding the brand now – would you say that it is still going through market development and brand adoption stage?

SL: Absolutely! We have just engaged a marketing company and they are helping us to develop the strategy. They are helping us refine our tone of voice, you know,

like the messaging – so it is all succinct and consistent. Up to now we have had no marketing budget, we never had! So, all our marketing is ad hoc and reactionary.

AM: I suppose it is like any brand that develops in the market - you must formulate a consistent brand communication message.

SL: That's it! That's exactly it. This company is also helping us to understand who exactly our consumer and target market is.

AM: Who is your consumer?

SL: The millennials, college graduates, educated consumers with a disposable income: 21–35 year olds predominantly. We have an older cohort of consumers as well.

AM: Looking at your assorted products – you started out with American Amber – how have you developed the other beers?

SL: We started out with a strategy that we only produce beers that we like to drink ourselves! We have a brewer from Colorado – Pete. He is a great brewer. We get together as a team and discuss the styles. When we produced Amber, there was a couple of Ambers on the market and we felt that we could better these – I think we have. We followed with the IPA - this was because the craft revolution was coming from America, a lot of the beers we produced to begin with would have been 'well-hopped' – a high hop profile which would be reflective of the American scene. Also, there is a company called 'BrewDog' that we would have looked at in relation to how they grew their brand.

AM: Is BrewDog an American company?

SL: No, Scottish. They are a \$1billion brand now, maybe more, I'm not sure. They started in 2007 in a garage, they had their first plant in 2009 and they are currently fundraising in the USA – well worth checking these guys out. They have grown phenomenally well. They have a beer called 'Punk IPA'; this was one of their first beers. They are sort of anarchists, rebellious but very savvy anarchists as they run a very good and clever business.

We have on-going recipe development and this comes from Pete our brewer, but we will discuss what styles we want to go with before he goes down that road. We have produced 17 assorted styles to date. We have 6 core styles, and the rest of the range is what we call specialities or seasonal beers. The reason we do these specials is that we feel it is another marketing tool.

AM: I have seen this strategy of producing seasonal beers with the Kinnegar brand.

SL: Yes, that's correct. The craft drinker is a curious animal – they like to experiment – a bit like the wine drinker – they will probably go for their solid bottle of wine and know what they are going to like – but they will also try something new – craft beer is the exact same.

AM: Taking myself as a consumer, when I go to a pub I like to experiment and even though I'm not a big beer drinker, I will always ask what brands of craft beer they have – so the point I am making is that your customer, or your potential customer, is almost a 'prostitute' to different beers. It seems that it is hard for them to stick to one brand?

SL: You are correct, Alan, they do prostitute to different breweries and assorted styles, but they also stay loyal to one brand as well. I am the same way myself – when I go into an off-licence or supermarket to buy a couple of beers, there are beers that are 'go-to' beers for me as I know on a Friday or Saturday evening I won't be disappointed by these – but I will also pick up a couple of others to try – some I may pour down the sink and hate – but I know I will always have the 'go-to' beers in the fridge!

AM: Would you say that Wicklow Wolf is a marketing company or a brewing company?

Simon pauses and thinks about this question......

SL: I think it must be both! If you don't market your brewery than you don't go anywhere. But the brewery is the engine of the organisation – the brewery is key to it all because you must produce top quality beer all the time and if you can't communicate and market this to your consumer then you won't be brewing for very long!

AM: What have you done in the last 3 to 6 months to develop the brand?

SL: Mmmmm.......that is a good question, Alan (*long pause from Simon*). I think one of the things we did is we came up with some new styles, for example Children of the Revolution to mark the centenary of the 1916 rising, and I think this generated a lot of interest in the brand – Quincey argued with Joe Duffy and a couple of his cohorts for an hour on the radio and this really helped to drive brand awareness of Wicklow Wolf.

We have also done a few different events – and this has come down to not really knowing who we should be communicating with – we did an equestrian event for example! (Simon points to a surf board hanging on the wall) – we did a film festival called 'The Shore Shots' film festival – this was a surfing festival – we have done a theatre festival......so like I said earlier, it's all a bit reactionary, ad hoc, we don't know who we should be saying yes to, we don't know who we should be saying no to and this really comes down to how they want to sell the brand and what we can get from this to develop the brand.

AM: This slides nicely into my next question, Simon – how do you know and how do you choose who your customer base is, as without consumer analytics this is hard to do?

SL: Yes, it is very hard to do this without more consumer and market information. We are working on our strategy, based on reports like the Bord Bia Craft Beer Market report, and we are defining who our target market is and the right way to speak to those consumers.

AM: What things about your business or the environment you compete in are different or changed in the last 12 months?

SL: Mmmmm.... (*long pause from Simon*). There are more players in the market, it's a little bit more crowded and it's getting more crowded every day. But it's funny – we are taking market share from the bigger guys actually. There is enough room to grow the business. When you look at it from a 'per head of population' perspective there is lots of opportunity to develop and build breweries and brands within the sector.

AM: From a non-expert viewpoint looking in on the industry and looking at it from an academic research perspective, there seems to be a good few 'fly-by-night' players coming into the market in the past couple of years?

SL: Yes, this is a good observation, Alan, there are players that are not as focused on premium product or branding and they are never going to make it because they haven't got the quality, the experience or the finance behind them. That said, some of the brands in the market only just want to be the local brewery looking to develop a lifestyle business – but there are some big players in the market and they have ambition – we are one of those players – we have lots of ambition to a point - we don't want to compromise our brand or our quality, so we are ambitious to grow organically. Funding is important for growth and growing a brand. Without the funding we had we would not be here today. We have just closed a second round of funding and we are just about to embark on building a new brewery which will be (when it's finished) 20 times the size of this one.

AM: What do you think will be different about your business in 12 months?

SL: This time next year we will be close to opening our new brewery, so we will be much more efficient. This is quite an inefficient brewery, it is very labour-intensive. We have ten people working for us now (Pete, our brewer was our first hire) and I think this time next year we will have considerably more people working for us. We will have a bigger sales team, a bigger marketing team - sorry let me correct that – we WILL have a marketing team (*we both laugh*) and a bigger brewing team.

Of course, one of the substantial changes that will occur over the next 12 months is that we will be exporting – we currently supply Northern Ireland and from an Enterprise Ireland perspective, this is an export market. We were going to target certain cities in the UK but with Brexit this plan may change. We are currently looking at different potential markets in Asia, we are working with Bord Bia in terms of the Boston project and Quincey has been talking with a number of key distributors in Europe, and in one case the biggest craft beer distributor in that country. Obviously, we have a capacity issue now so we are not able to produce much more beer from this plant.

AM: So, you have a lot going on, Simon: you have this brewery going on, the development of the new brewery, the brand development, the export development - it's busy. You are a classic start-up scenario?

SL: There is one important part of this conversation that I have not brought up yet! (Simon has an excited look on his face) We are the only brewery in Ireland that has its own commercial hop farm. We have ten acres of land in Roundwood, two of which are planted with hops at the moment. It is a terrific addition to the brand as it encompasses the 'Wolf' concept - Humulus Lupulus (hops) and Lupus (wolf). But hop farming is highly labour-intensive so I will be taking a business trip to the States very soon to look at harvesting, drying and baling machinery.



With the hops from our farm we produce this beer called 'Locavore'. The first style of this beer was a blonde in 2015, and in 2016 we produced the Irish Pale Ale and this year we are producing another modern style. This is an important part of the marketing story of Wicklow Wolf – yes, it's a marketing tool, but it is more than that – people want to know the provenance of their beers and this beer is made entirely (said very proudly) of Irish ingredients, including the bottle itself and the label. The only thing that is not Irish is the cap – because it can't be sourced in Ireland! From a 'farm to glass' perspective we are passionate about the natural world around us.

The last commercial hop farm in Ireland ceased to be in 1989. They had 40 acres and produced exclusively for Guinness.

AM: Is the hop farm concept coming from your horticulturist background?

SL: Yes, yes, it is - the skillsets in the business really work. We don't think anyone else in the industry in Ireland has these unique set of skills: baker, brewer, and horticulturist!

AM: We hear the term 'Globalisation' a lot these days Simon, but in marketing and in branding, particularly in a market as small as Ireland, it's all about 'Glocalisation', and this means that price and brand-positioning go hand in hand. Where do you think your brand is positioned in the market, and how do you plan to improve this positioning?

SL: Wicklow Wolf is a premium product and we are positioned high in the market.

AM: Is Wicklow Wolf premium price?

SL: Yes, we are the most expensive Irish beer in O'Brien's off-licence, and we are also the number one seller in this store.

AM: So, you are the most expensive and the bestseller?

SL: Yes, here is our thinking - if you walk into O'Brien's and they have 100's if not 1000's of different beers and bottles of wine, the consumer has a choice. They have wines for €8 in the bins but they also have wines on the shelf for €200. The wines that are on the shelf for €200 are selling, that's the only reason that they are there. They may not sell the same volume but they sell. We are the most expensive Irish craft beer on their shelves and the bestseller – it is working for our brand here!

AM: Do you think that your pricing and positioning reflect the Wicklow Wolf brand image?

SL: Absolutely (*said by Simon with gusto*) – we are about quality, about pushing the boundaries in terms of styles and doing things that nobody else is doing, and making sure that our beers are absolute premium all the time. All of this is part of the brand.

AM: So, you are the number one seller in O'Brien's, and you are certainly not the cheapest Irish craft beer on the market – what are the key factors that the brand must focus on in getting your customers to accept the premium price that the brand commands?

SL: That's a very difficult question to answer!

AM: Don't worry, Simon, that is probably the ultimate marketing question! (We both laugh).

SL: I think our brand image from a bottling and labelling perspective stands out to the consumer and gives a different message compared to the competition. Our products sit alongside many other craft beer brands but our labels are very distinctive and when you see the palette of colours on the shelf it really stands out from the crowd. A lot of the other craft beers tend to have a confusing message - their labels are confusing, and even some breweries look the same!

Visually it must be good to make the purchase and once it is tasted, the consumer knows that they are getting quality, and more importantly they know that, for the extra couple of cents they pay, they will consistently get a quality beer. I also believe, along with how the product looks and feels on the shelf, communication with our consumer audience through social media is very important, inviting them to be part of the brand. You could spend marginally less on another craft beer and find that it is undrinkable and it must be thrown down the sink.

So that's the image – we try to be creative with names and people who drink craft beer are curious folk, they will pick up a lot of different bottles of the shelf but if they see a big block of Wicklow Wolf on the shelf, for a start its easier to identify it as a brand story and when they read the label we generally find that they put it in their basket.

AM: The wine industry is similar where most people buying wine make their choice on the label, not necessarily on the wine itself!

SL: Of course...... social media has helped our brand as well. Before a customer gets into an off-licence or a bar they can be so pre-informed about a craft beer that their mind is already made as to what they will purchase.

AM: You have just perfectly linked my next question, Simon. How important is your website, social media and word-of-mouth-marketing in driving traffic to your brand?

SL: Huge! The reason is that craft beer drinkers are a community – they talk a lot – tweeting and bloggers being an example. They are opinionated and they want to tell their story about the beer they like. Social media is playing, and will play, a huge part because the demographic that we are targeting are high social media users. Instagram, the visual side of social media, is also important and our website is our company window. We are updating this with the new marketing company now. We have a profile of the staff on the website and this makes the brand almost personal and gives a 'real' feel to the brand from the consumer's perspective.

AM: Thanks Simon, I have only two more questions! Do you believe that you have one major competitor in the market or do you acknowledge competitors?

SL: While there is a lot of noise and players, we are taking the margin for the mass-produced beers, for example the Diageo and the Heineken brands, so we don't see the other craft beer companies as direct competition; in fact we see it as co-opetition. There is great interplay between the breweries, for example we may run out of a hop and we make a phone call and they will send us this – on the flip side, they may run out of grain and we will send them some – so there is great cooperation in the industry right now. Obviously, there are examples of non-cooperation - but if you look at what we are doing today when I finish this interview with you – we have just got our costings on the new plant and they are astronomical, so we are visiting a brewery in Wexford to try to get some help and advice from them on costs and they are happy to share information with us.

AM: Do you want to say where the new plant will be built?

SL: It will be in Wicklow of course! (Simon gives a wry smile) We did look at the Maltings in Bray.

AM: So, this was a brewery?

SL: Yes, this was a brewery called Watkins & Darley; they ceased to brew in 1908. If we could get this site it would be great. Obviously wherever we move to it must be in Wicklow, this is the story!

AM: What is the future for Wicklow Wolf?

SL: Well.....we have just closed our second round of funding, we have plans to build a much more efficient facility and we are looking at many different export markets. (Simon takes a deep breath and looks proud before he says......) We want to be THE coolest, THE best producer of beer in Ireland. I think we are that already

but we want to try to bring this to the next level - nationwide in bars, we want to grow our products and our brand. When people talk about good beer we want Wicklow Wolf in the same sentence. We want to be the benchmark for quality so that Wicklow Wolf becomes the top beer that everyone looks to.

AM: Simon, here is the nightmare question in any interview: Where will the brand be in 5 years' time?

SL: Mmmmm......we did a piece on the TV program 'Ear to the Ground' and they asked me a similar question and I said something, which in hindsight I shouldn't have said, but it demonstrated my ambition. I said that I wanted Wicklow Wolf to be a household name, but I don't really want it to be a household name because 'household' may be a bit boring, but what I was trying to say was that I want Wicklow Wolf to be recognisable by the right people and have strong brand awareness in export markets across Europe, Asia and America. So I want the consumer to think that if they want to know about the latest innovation in craft beer.....go and check out Wicklow Wolf.

We want to be the brewery that is doing things that nobody else is doing. We have a beer called Kentucky Common. This is a very old style beer which Pete brought over from Colorado. There is a brewery in the UK called Beavertown and they tweeted last week that they were the first people to bring Kentucky Common to Europe – we had to correct them by stating that we have been brewing Kentucky Common for the last two years. This is what we want from the brand, doing things that no one else is doing.

AM: Simon, what is your opinion regarding the new legislation to allow craft breweries to sell their craft beer product on tours? How will this change/enhance operations at WW?

SL: Wicklow Wolf are delighted that the bill was approved by the cabinet and unanimously supported by the Dail. It is a very welcome and positive development that will bring Irish craft breweries in line with other breweries all over the world. Imagine going to vineyards around the world and not being able to legally drink or buy wine? This is just common sense legislation.

If it goes through the Oireachtas (hopefully before Christmas 2017 and without much change to it) it will for WW create another revenue stream, employ at least one, maybe two, more people initially. Also, apart from the revenue generated and job creation, it will hugely help with brand building/awareness. It's a great opportunity to enhance the tourist experience and grow a new tourism sector. Up to now we have being doing tours but it's been more a marketing investment for WW, costing time and money or at best break-even; with this new bill there is a real opportunity to continue to build our brand while using the extra money made to grow our business.

AM: A final question, Simon. As I sit here I am looking at the shelf in front of me and I can see a plethora of different Wicklow Wolf beers......you must have a bestseller in those?

SL: It's funny; a lot of breweries have flagship beers like BrewDog's Punk IPA, and their other beers hang off these flagship products. For us, we have three beers (*Simon walks over to the shelf and takes the three different bottles down*) and they are all neck-and-neck in terms of sales. We thought that our consumer would bring us to an out-and-out flagship beer, but when we look at sales our three top beers are American Amber, IPA and Elevation.

AM: Elevation is an interesting name for a craft beer. Where did the Elevation name come from?

SL: Elevation is an interesting beer alright! (*Simon chuckles*) Our hops are grown at an 'elevation' of 1200ft, hence the name......others may tell a different story, but I'm sticking to mine! (*Simon has a wry smile together with a nod and a wink!*)

AM: Many thanks for your time today, Simon.

SL: You are most welcome, Alan.

As I walked out of the brewery that morning, I was energised by the passion and fearless approach that Simon and his colleagues had taken in approaching this very competitive market. I opened my car door and looked back into the brewery and noticed the large brewing vats and beside one of them was cases of beer with the very impressive Wicklow Wolf Logo embossed ready for shipment out into the jungle; at this point it was hard not to remember Rudyard Kipling's quote, "For the strength of the pack is the wolf, and the strength of the wolf is the pack". As I stepped into my car I knew that this wolf, The Wicklow Wolf, was forming a very strong pack, one that should be feared by its competitors yes, but more so respected for its stature and prowess in the jungle that is the drinks industry.