Eighteen Beer & Spirits Innovation
Key Trends for 2014-2015

-Executive Summary-

March, 2014
About this document

This document shares our point of view in the different factors that are shaping the Beers & Spirits industry product innovation trends. Advisium Group has advised a number of very important players on this industry and this time our research has been backed up by our Alcohol Industry expert Filiberto Amati and interviews to key stakeholders in key markets. This a public version, which may be distributed and used as long as the intellectual ownership of this material is always referred and quoted to Advisium Group.
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Setting up the context of this document

Background

• The Beer and Spirits industry is continuously reshaping itself due to Society, Consumer and Industry dynamics related drivers
• This situation pushes players to launch an important number of innovations every year

Focus

• To support better our clients’ needs, we wanted to understand better the key trends that are driving growth in the Industry
• We have focused mainly on categories with large volume such as: Beer, Whiskey, Vodka, Rum, Gin, Tequila and aperitifs

Product launch trends

• We have analyzed information of product launches during the last 18 months

Consumption drivers

• We have crossed many of the found trends with major consumer need states

Opportunities for growth

• We have built a fast picture on how tracking and using these trends can be helpful for boosting the strategic growth of your business
I. Big Picture
Scope and reach of this document

WE HAVE BUILT A BIG PICTURE ON THE MOST MEANINGFUL TRENDS IN NPD FOR THE BEER & SPIRITS INDUSTRIES. We have pulled together a very huge amount of public available information, synthesized it, analyzed it and then we have enriched our conclusions with the view of experts who are actually part of many of the key market players.

Data gather → Analysis → Conclusions and Recommendations

Scope & Reach

Product categories:
- Beers, Spirits, Appetizers

Countries covered:
- Core: USA, UK, France, Spain, Canada, Netherlands
- Other countries: Argentina, Germany, France, Brazil, Italy, New Zealand, South Africa, Mexico, Croatia, Denmark, China, Lithuania, Russia, Japan

Time span covered:
- Major new product launches during the last 18 months for the product categories

Major companies covered:
- Beer: AB Inbev, SAB Miller, Heineken, Carlsberg, Molson Coors, Asahi, Anadolu EFES, Grupo Modelo, Sapporo, Kirin, Mahou San Miguel, Boston Beer Group, Grupo Damm, Brewdog, …
- Spirits: Diageo, Suntory, Bacardi, Beam, Pernod Ricard, Brown-Forman, Campari, Disaronno, …

Sources:
- Experts interviews
- Press notes and consumer reviews on recent launches
- Our own experience
I. Big Picture
Main drivers in the Beer & Spirits consumption

We have considered three macro categories impacting consumption: society related, consumer related, industry related.

Society related
• Blurring genders
• Sustainability Imperative
• New Twist on local vs. global
• Millennials

Consumer related
• Premiumization
• National Pride and Nostalgia
• Heritage
• Return of ‘the real man’
• New LDA Entry Points

Industry related
• Regulation
• Consolidation
• On-trade changes
• Off-trade changes

Key Drivers
• Genders are influencing each other’s choices
• Sustainability is becoming a decision factor
• The battle between local heroes and global brands is far from being over
• Millennials with their beliefs and consumption patterns are changing the industry

Outtakes
• Polarization of volumes in the extreme price segments
• Re-birth of national heroes alongside strengthening of global franchises
• Storytelling beyond ‘country of origin’ is embracing heritage
• Manliness as advertising insight
• Extreme flavors and Low Cal as categories entry point

• Debate over Minimum Pricing
• Drink and Driving regulations
• Increase in Taxation
• Advertising bans
• Economic Cycle
• Mergers and Acquisitions
In a global perspective there are also particular regional dynamics which drive consumption.

**West Europe**
- On-trade resilient in France and Italy, where though extreme polarization started to show
- Growing share of discounters in the region
- Germany’s on-premise is picking up
- Beer sales are flat

**Central & East Europe**
- Fall of CEDC in Poland
- Impressive growth of Aperol in Austria and Switzerland
- Growth of Flavored Beer and Ciders caught many by surprise

**Russia & CIS**
- Advertising ban
- Ban on Kiosk sale for beer
- Increase in Taxation
- Common bet on soon-to-come middle class

**USA**
- Skinny Girl phenomena
- ‘MadMan’-ization of cocktails
- Craft Beer growth is on everybody’s radar screen
- Premium category still growing but mainstream under price pressure

**China & Japan**
- Growth in volumes is compensating general concern of profitability of the Chinese market
- Long term decline of beer driven by young consumers preferring wines and cocktails

**Lat Am**
- More and more producers are vertically integrating in Mexico, Brasil and Argentina

**Australia & SEA**
- Increasing pressure from the anti-alcohol lobby in Australia, are fueling the media coverage of binge-drinking problem
- RTDs still take the lion’s share

**Africa**
- Nigeria and South Africa already are the new frontier for brewers and spirits producers
## I. Big Picture

### Beer & Spirit Innovation Trends in 2014

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<thead>
<tr>
<th>Core Group</th>
<th>Description</th>
<th>Trends</th>
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<tbody>
<tr>
<td>Design</td>
<td>Industry is embracing design, by proposing enhanced ‘look and feel’ and more emotional storytelling</td>
<td>1 Sophistication</td>
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<td>Industry is evolving from a category centric approach to a consumer centric one</td>
<td>6 Blurring Boundaries</td>
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<td>Intertwining Occasions</td>
<td>Industry is breaking the traditional boundaries of occasions, with categories push and rituals pull changing the rules of the game</td>
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<td>18 Stretching the limit of refreshment</td>
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I. Big Picture
Why this may be important for your business?

Our experience is that tracking trends can be helpful for you in three possible ways which in the end point out to capture growth for your business.

- Understand where is the market going
- Identify opportunity windows
- Capture growth for your Beer and Alcohol Business
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## II. Beer & Spirits Innovation Trends

### Tracking trends

Building a good understanding on the trends that shapes your market is a powerful tool to inspire and feed your strategic growth initiatives.

<table>
<thead>
<tr>
<th>What do we understand as a trend?</th>
<th>How do we feel it impacts your business?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• A trend in beverages marketing is a fact based set of directions where a given market is pointing towards</td>
<td>• Tracking and understanding trends can help your business to:</td>
</tr>
<tr>
<td>• Trends are normally tangible at a growing and also at a mature stage of a given tendency</td>
<td>» Understand better the key drivers of your market / category / industry</td>
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<tr>
<td>• We track these trends through different sources including tracking product launches, sharing opinions with industry experts, listening to what consumers are sharing with others</td>
<td>» Build a wider picture on how your current and potential consumers are appealed by offerings which they find unique and interesting</td>
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<td>» Inspire innovation and growth initiatives for your own brands and product platforms</td>
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<td></td>
<td>» Foresee the emergence of a given competitor or even a shift in the category business dynamics</td>
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</tbody>
</table>
Category, Occasions, Shopping decisions are intertwined between genders, belong to none

Economic and Environmental sustainability are becoming a consumption driver

While global franchises are stronger + stronger, local heroes are growing faster and faster

In the next 5-10 years they will represent nearly half of the ‘Beer and Spirits’ population
II. Beer & Spirits Innovation Trends

CONSUMER related drivers in Beer & Spirits consumption

Consumer trends include changes in storytelling and advertising insight platform as well as novelty in taste.

**PREMIUMIZATION**

The mainstream segment is the source of volume for both premium and low price brands

**HERITAGE**

Storytelling is becoming about heritage (old and new) beyond traditional ‘country of origin’

**NATIONAL PRIDE + NOSTALGIA**

Nostalgia and National pride appeal to reinforcement need

**NEW LDA ENTRY POINTS**

Extreme flavors and Low Cal as categories entry point

**RETURN OF ‘THE REAL MAN’**

‘Real Man’ trends as a strong communication insight platform across many categories and brands
II. Beer & Spirits Innovation Trends

INDUSTRY related drivers in Beer & Spirits consumption

Industry trends include market consolidation, changes in regulation and economic cycle.

**REGULATION**

Advertising bans, Drink and Driving regulations, discussion on minimum pricing, tax increases

**CONSOLIDATION**

More and more volumes in the hands of fewer and bigger players
### II. Beer & Spirits Innovation Trends

#### Beer & Spirit Innovation Trends in 2014

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II. Beer & Spirits Innovation Trends

Trend #1: Sophistication

‘Look and feel’ of new and current brands and/or line extensions is becoming more and more refined and even edgy in some occasions.

**Beers**

- **Beck’s Sapphire**
  - Launched as ‘Black is the new Black’ to delight consumers with a ‘smooth and distinctive’ experience

**Spirits**

- **JW Double Black Label**
  - Taking the Black Label to new shores by adding peated malt

**EXAMPLES**
**II. Beer & Spirits Innovation Trends**

**Trend #2: Iconization**

Brands are developing new and improved packaging while aiming at creating unique and relevant ‘icons’, which help building the brand equity among consumers.

<table>
<thead>
<tr>
<th>Beers</th>
<th>Spirits</th>
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<tbody>
<tr>
<td>Sol Beer</td>
<td>Jack Daniels White Rabbit</td>
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<tr>
<td>Sol Beer</td>
<td>Example</td>
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<td>international</td>
<td>Example</td>
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<td>• Sol Beer has</td>
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<td>launched a new</td>
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<td>Example</td>
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<td>shelves</td>
<td>Example</td>
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</tbody>
</table>

**EXAMPLES**

**Sol Beer international identity**
- Sol Beer has launched a new packaging that builds up upon its icons and ensures special visibility on shelves.

**Jack Daniels White Rabbit**
- This limited edition of Jack Daniels launched in 2012 is one of the best examples of leveraging brand icons to improve packaging design appeal.
II. Beer & Spirits Innovation Trends

Trend #3: Interactivity

Digital World is enhancing and complementing the brand experience beyond product consumption moments.

### Beers

**Budweiser: Track your Bud**
- By using the bottle date and the specific App consumers can learn from which facility their Bud was shipped and how and when it was brewed

### Spirits

**Spotify on Tour with Bacardi**
- Partnership between the bat brand and the digital music service
**II. Beer & Spirits Innovation Trends**

**Trend #4: Commemorative and Limited Edition**

Commemorative and Limited Edition products are a great proxy to enhance the brand and to commercially activate niche channels.

<table>
<thead>
<tr>
<th>Beers</th>
<th>Spirits</th>
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</table>
| ![Budweiser](image1.png) **Budweiser: Limited Edition**  
- Limited Edition supporting Vancouver Whitecaps FC, on sale exclusively at game venue | ![Gran Patrón Piedra](image2.png) **Gran Patrón Piedra**  
- Limited Edition Extra Anejo, which sells exclusively through DFS |

**EXAMPLES**
II. Beer & Spirits Innovation Trends

Trend #5: Premiumization

Premiumization is happening at the expenses of the mainstream segment, nevertheless ‘look and feel’ is becoming more premium across the border.

<table>
<thead>
<tr>
<th>Beers</th>
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</thead>
<tbody>
<tr>
<td>New Belgium: La Follie</td>
<td>Baileys Chocolate Lux</td>
</tr>
<tr>
<td>• A new sour brown ale, launched in craft beer segment featuring the year in which the beer has been bottled (single bottling per year)</td>
<td>• Inspired by Belgian Chocolatier, Baileys has launched a premium looking Whisky Cream</td>
</tr>
</tbody>
</table>
II. Beer & Spirits Innovation Trends

Trend #6: Blurring Boundaries

With the traditional breadwinner model is not representing neither developed nor developing economies, traditional spirits gender barriers are coming down.

**EXAMPLES**

<table>
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<th>Beers</th>
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<tbody>
<tr>
<td>Copenhagen beer</td>
<td>Jim Beam Red Stag</td>
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<tr>
<td>• Carlsberg launched this beer, which breaks category codes and is rooted in fashion and design</td>
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</tr>
<tr>
<td>• Intended for both modern women and men</td>
<td>• Hardcore Cider launched in 2013 to join the Red Stag family of Jim Bean’s franchise</td>
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</table>
II. Beer & Spirits Innovation Trends

Trend #7: National Pride / Nostalgia

Increasing pride for local brands while global brand franchises are strengthening faster and faster.

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<tbody>
<tr>
<td>Blackstone Adam Bomb</td>
<td>Johnny Walker</td>
</tr>
<tr>
<td>• An award winning India Pale Ale brewed in Tennessee, getting on the radar screen of lifestyle bloggers</td>
<td>• According to many recent rankings the most valuable global spirit brand</td>
</tr>
</tbody>
</table>
II. Beer & Spirits Innovation Trends
Trend #8: Product Storytelling

More and more brands are rejecting the ‘country of origin’ Reason to believe, to move towards a broader spectrum of storytelling opportunities.

<table>
<thead>
<tr>
<th>Beers</th>
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</thead>
</table>
| **Russian Stout**  
Famous for their “Arrogant” Series, which includes award winning Arrogant Bastard Ale, Double Bastard, Lucky Bastard | **Jim Beam Devil’s Cut**  
Devil’s cut tells the story of the the ageing induced evaporation and its usage in a special edition |

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II. Beer & Spirits Innovation Trends

Trend #9: Return of the real man

While the ‘Real Man’ is re-emerging and the Boundaries are more and more blurred, some interesting twists are occurring in the marketplace.

<table>
<thead>
<tr>
<th>Beers</th>
<th>Spirits</th>
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</table>
| Voll Damm Double Malt  
- ‘Doble o Nada’ campaign, because real man deserve a double malt | Luksusowa  
- The brand introduced the Man’s Guide to Manliness to help man living in a non-metrosexual life |
II. Beer & Spirits Innovation Trends

Trend #10: Sweet & Flavored

Sweet & flavored beverages help bringing new LDA consumers. Flavors vary from geography to geography from citric, to tropical or from berries to honey or even coffee. New tastes provide producers with new reasons to talk and appeal consumers to try and engage with their favorite drink.

<table>
<thead>
<tr>
<th>Beers</th>
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<tbody>
<tr>
<td><img src="image" alt="Staropramen Cool" /></td>
<td><img src="image" alt="Jack Daniel’s Tennessee Honey" /></td>
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</tbody>
</table>

**Staropramen Cool**
- This Czech brand successfully tapped a new category with low cannibalization, by expanding into flavored beer: a blend of fruited soft drink and beer with a lower ABV, targeting young men and women.

**Jack Daniel’s Tennessee Honey**
- Although this blend of Whiskey and honey liqueur has been around since 2000s, it has recently gained industry’s attention given its successful international growth with very low cannibalization of mother brand.
II. Beer & Spirits Innovation Trends

Trend #11: Craft authenticity

While many mainstream beverages taste are becoming more standard due to very different factors, consumers are looking for more authentic tastes. Craft beer is becoming a worldwide phenomenon gaining popularity step by step, with many major producers launching initiatives to build upon this trend too.

**Beers**

**Spirits**

**EXAMPLES**

**Brewdog a worldwide referent**
- This Scotland based brewer has gained popularity steadily in the last years becoming a referent player in the global craft beer category

**Beer making kits are also becoming popular**

**Herradura Extra Añejo Selección Suprema**
- Casa Herradura brand refined the primary and secondary packaging for its Extra Añejo Selección Suprema tequila to reflect the casa craftsmanship, quality and authenticity of the product
II. Beer & Spirits Innovation Trends

Trend #12: Gourmet / Connoisseur

As a growing number of consumers is looking for more sophisticated tasting experience, many players in the industry are introducing Gourmet and Connoisseur variants to appeal this target group.

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<tr>
<td><strong>Yebisu Joel Rebouchon Beer</strong></td>
<td><strong>Ron Bacardi, de Maestros de Ron, Vintage, MMXII</strong></td>
</tr>
<tr>
<td>• Renowned and Michelin star awarded chef Rebouchon has teamed with Sapporo brewery to bring up this beer</td>
<td>• A blend of finest Bacardi rums that have been resting in oak barrels over the past 20 years and finished in 60-year-old Cognac barrels</td>
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</tbody>
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II. Beer & Spirits Innovation Trends

Trend #13: Light

In many regions keeping the fit / slim shape is very important for consumers, therefore many Industry’s major players are supporting offerings that capture this need and appeal calorie sensitive consumers.

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<td>Skinnygirl cocktails and wines</td>
</tr>
<tr>
<td>• Launched in 2011, this is the mainstream beer with the lowest calories in the market</td>
<td>• This brand (part of Beam) is recognized for offering low calorie cocktail options for ladies and has been growing fast during the last years</td>
</tr>
</tbody>
</table>
II. Beer & Spirits Innovation Trends
Trend #14: Personalization

As in other consumer goods categories, personalization is driving product innovation in the Beer and Spirits industry. Many brands are capturing this trend wave through participative product design.

**Examples**

<table>
<thead>
<tr>
<th>Beers</th>
<th>Spirits</th>
</tr>
</thead>
</table>
| **Heineken design your bottle contest**  
• The brand has launched for two years this exciting action, which has resulted in high awareness and nice designs made by consumers | **Samuel Adams Crowd Craft Project**  
• Consumers were empowered to propose their own preferences through a Facebook App  
• With users data, the brand developed a collaborative fan made ale |
| **Beefeater crowdsourcing project**  
• The brand has launched a campaign to crowdsource the Design for the 2014 Beefeater 24 Limited Edition Pack in the UK | |
Industry pushes beyond its comfort zone boundaries to appeal consumers looking for options that break the codes of the category.

**Trend #15: Transgression**

**Beers**
- **Tuborg Skøll**
  - This beer is flavored with vodka, grapefruit and lime
  - This product is targeted for young LDAs who want to go beyond the traditional beer category

**Spirits**
- **J&B Crazy Colors**
  - The brand launched for France and Spain a set of limited edition bottles inspired in psychedelic imagery
  - Launch was supported with adhoc sponsored parties
II. Beer & Spirits Innovation Trends

Trend #16: Value & Price convenience

As with many other categories, consumers and the channel demand higher value for less price. This need has led producers to pursue format innovations driven by sizing and value formats. In addition, it has also encouraged very aggressive discounts among incumbents to gain / defend market share.

<table>
<thead>
<tr>
<th>Beers</th>
<th>Spirits</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="20cl Super Bock" /></td>
<td><img src="image" alt="Spirits Example" /></td>
</tr>
</tbody>
</table>

**EXAMPLES**

20cl beer bottles in Portugal and Spain have become very popular during summer seasons, because they are the right size for keeping beer cool.

Unfortunately for many players, aggressive discounts are becoming the rule of the game!
II. Beer & Spirits Innovation Trends

Trend #17: Shot-sters

As cocktail shots gain popularity in bars worldwide, some companies are building upon the trend and launching packaged cocktail shots.

EXAMPLES

LIQS Cocktail Shots
- founded in 2013, these are ready-made mixtures of premium spirits and natural flavors, currently sold in four flavors and available at liquor stores and fine hotels.

Twisted Shotz
- Twisted Shotz are bartender-quality mixed drinks with real spirits, real convenience and real taste.
II. Beer & Spirits Innovation Trends

Trend #18: Stretching the limit of refreshment

As refreshment is one of the main drivers for beer and some cocktails consumption, this trend is a recurring one on the agenda of main industry players.

<table>
<thead>
<tr>
<th>Beers</th>
<th>Spirits</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ichiban Shibori Frozen Draft</strong></td>
<td><strong>Malibu RTS Cocktails</strong></td>
</tr>
<tr>
<td>• This brand from Kirin launched a frozen foam which acts as an insulating lid and can keeps the beer frozen to -5°C</td>
<td>• Consumers find pouch packaging very convenient for putting inside the freezer just before the party starts!</td>
</tr>
</tbody>
</table>
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III  Opportunities for Organic Growth

IV  About us
III. Opportunities for Organic Growth
Driving growth by understanding trends

Beverages producers can aim to two strategies for driving growth by innovating through consumer trends.

1. Catch and build growth upon key consumer trends

2. Lead and own new trends built upon consumer need states
### III. Opportunities for Organic Growth

#### 1. Catch and build growth upon key consumer trends

_We help you to ride on the key trends that your consumers are pursuing._

<table>
<thead>
<tr>
<th>Tools</th>
<th>Description</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trends driven Workshop</strong></td>
<td>• 2 day session with stimuli from what is happening not only in your category and country but in a more global picture to bring ideas which will inspire your team to ideate new ones aligned with your brand and consumers</td>
<td>• After exploring major trends with us, a major brewer identified a quick win to build upon the Natural trend and launch an unfiltered variant</td>
</tr>
<tr>
<td><strong>Adhoc list of ideas to develop &amp; screen</strong></td>
<td>• Our team scans interesting trends for your brands / consumer groups and builds up a list of NPD ideas suitable for fueling your innovation pipeline</td>
<td>• After building a list of more than 150 ideas based on key trends, a major brewer decided to build and screen 8 innovation platforms</td>
</tr>
</tbody>
</table>
| **Cocreation with lead users** | • Half-day and full-day sessions with leading edge consumers, designers, bar-tenders and marketers, to create together new product and brand activation ideas  
  • Cocreation can begin right from scratch or building upon existing prototypes  | • After running a few cocreation sessions one of our clients discovered new ways to fuel a previously hard to build idea so that it connected with consumers                                                  |
| **Inspiring Ethno Trips**   | • Adhoc trips outside your comfort zone (eg. Geography), so that your team experiences the dynamics and feeds with ideas from markets that are experiencing category growth due to innovation both in product and route-to-market | • After a trip to one of the key markets identified by our team, a major producer was inspired with new ideas to build and test                                                                               |
III. Opportunities for Organic Growth

Lead and own new trends built upon consumer need states

Understanding the key trends can also be the opportunity to dig into consumer need states and build meaningful value propositions.

<table>
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</thead>
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<tr>
<td>Brand driven inno-initiatives</td>
<td>• Matching the key trends with your core consumers’ need states and explore product innovation opportunities which aligned with your brand essence, so that it is easier to leverage your brand assets</td>
<td>• Based on the brand positioning and core values, we helped a brand to find the best matching tastes to extend their offering</td>
</tr>
<tr>
<td></td>
<td>• Finding strategic opportunities to activate your brand based on the consumer need states that seem more relevant at the moment in a way to establish new communication codes and means to gain consumer relevance</td>
<td>• Leveraging brand values on the right relevant trend, helped activation activity to connect better with consumers and gain awareness</td>
</tr>
<tr>
<td>Uncovering business assets through consumer rituals</td>
<td>• Helping companies to connect with consumers, building emotional links through rituals attached to a specific brand / product</td>
<td>• Corona and lime ritual is just an example of what your brand can build in terms of consumer relevance and brand ownability</td>
</tr>
<tr>
<td></td>
<td>• Exploring product innovation opportunities driven by consumption rituals already existing in the market</td>
<td>• 5L keg is result of a deep understanding on consumption rituals and motivations</td>
</tr>
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</table>
Contents

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IV  About us
Consulting boutique, founded in 2009 by a group of former FMCG Marketing Directors with additional previous experience at leading Strategy Consulting Firms and Communication Agencies.

Based in BARCELONA, but with clients all over EUROPE.

Specialized in MARKETING, INNOVATION & STRATEGIC GROWTH for FMCG, Pharma and Consumer Services.

We help our clients to convince their shoppers at the POS & delight their consumers with relevant, unique and attractive BRANDED value propositions.
At Advisium we support our clients to grow both through organic and inorganic means.

### Organic Growth
- New Products & Services
- Optimal Branding Propositions
- POS & Channel Innovation
- International Market Expansion
- Business Model Innovation

### Inorganic Growth
- Acquire & Develop Foreign Brands
- Acquire / Partner a Foreign Player to gain Distribution in its Local Markets
- Acquire / Partner Foreign Player to leverage its Access to International Distribution / broaden offering

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IV. About Us
We fuel Strategic Growth to our clients
IV. About Us

Company Leadership

- More than 15 years of expertise and experience on a very wide spectrum of the strategic and operational side of marketing and innovation management
- Solid experience launching new products & brands in many Foods, Beverages, FMCG and Pharma categories in several countries
- Experienced senior executive leading results both as external strategic consultant and as internal marketing executive
- Strategic Advisor and speaker at ESADE CREAPOLIS (ESADE Business School’s Innovation Hub) and academic collaborator at IESE Business School
- Languages: English, Spanish, French, Catalan
- Main companies that I have done projects for:
  - Foods & Beverage: EFES, Molson Coors, Mondelez, Carlsberg, Damm Beer Group, Grupo Leche Pascual, Nutrexpa, SAB Miller, Coca-Cola, Heineken, Panrico, Chupa Chups, Carlsberg, Torres, Bahlsen
  - Cosmetics & Pharma: Revlon, Reckitt Benckiser, Lilly, Boehringer Ingelheim, Diafarm
  - Services: Living Social, Grupo Barceló, Belgacom, Banco Santander, Citibank, Atrapalo.com, MTV, Grupo Planeta, BBDO

FRANCISCO PESTANA
- Founding Partner of Advisium Group
- MBA awarded by IESE Business School
- PhD Researcher in Management - Consumer driven Innovation by Cranfield University’s School of Management
- Dual citizenships: Spanish & Mexican
IV. About Us

Expert Talent Board

FILIBERTO AMATI
Alcohol & FMCG Industry Expert, Brand Strategist & Quality Partner


JORGE GONZÁLEZ
Go-to-Market Strategist & Quality Partner

Spanish. LBS PhD in Business Management. Assistant professor at IESE Business School. Global experience advising leading FMCG companies.

MENNO MARIEN
Creative & Ideation Strategist

Dutch. Expert in creating new concepts. Former director at a couple of Spain's leading innovation agencies. Associated Professor at Imagin (La Salle University – Spain).

EDUARD VIDAL
Branding Strategist

Spanish. Former Strategic Planner and Branding consultant at several communication agencies in Spain. Large experience launching creative concepts and campaigns in FMCG. Pharma OTC, Automotive and Financial Services industries.

ESTER GRAU
Consumer & Shopper Insights Strategist

Spanish. Former head of market research for the adhesives and cosmetic division at Henkel Spain. Expert in qualitative and quantitative research.

JONATHAN CONN
Digital Growth Strategist

Australian. Digital consultant and entrepreneur. Former head of digital retail at Home Retail Group PLC (UK) Former consultant at the global PwC strategy practice. Global experience including UK, Australia, Ukraine, Spain and Germany.
We help companies to lead their Innovation and Marketing initiatives around four key areas: (1) New Products, Brands and Services Ideation & Development, (2) Sales and Business Model Innovation, (3) Marketing Strategy & Intelligence, and (4) Optimal Brand Activation.

**Innovation**

- **New Products, Brands & Services**
  - I help companies to generate and launch new products & brands “from scratch” and / or to innovate by leveraging any of their offering’s essential values and attributes:
    - Unique Benefit /Claim / positioning / communication
    - Optimal proposition / Brand territories
    - Consumption / purchasing moments
    - Interaction with other products / services
    - Format / packaging
    - Usage / storage / disposal

- **New Sales and Business Models**
  - I help companies to innovate the way they do business by working their commercial and business models on the following areas:
    - New channel relationship / collaboration models
    - New market / channels strategy
    - New models to accelerate sales conversion
    - New corporate / service cultures
    - New business models

**Marketing**

- **Marketing Strategy + Intelligence**
  - I help companies to understand their current and potential shopper segments, key drivers and needstates so that they can approach them with appealing offerings by focusing on:
    - Consumer / end user & shopper insights and key decision triggers map
    - Consumer & Shopper marketing strategy driven by shopper opportunities + needs and possibilities at every Key Account and with every Key Product / Category
    - Optimize the offer funnel and the organization dynamics to make more agile and efficient the route-to-market

- **Optimal Brand Activation**
  - We help companies to make true their efforts to appeal the Shopper at the POS (off & online) by leading:
    - Focused communication + merchandising solutions aligned with shoppers’ missions, consumers’ drivers and brand’s core territory
    - Shopper driven promotions and optimal assortments aimed to profit from traffic generated by the whole category
    - Detailed 360 campaigns & promotional activity plans, optimal assortments + planograms per Key Account
    - Action plans, KPIs, roles and responsibilities for key personnel
Advisium Group core team has advised a large number of companies helping them to generate and capture value on each initiative.
IV. About Us

Global experience
### Main Services

<table>
<thead>
<tr>
<th>Interim Management</th>
<th>Consulting / Advisory</th>
</tr>
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<tbody>
<tr>
<td>1. Marketing Innovation Management</td>
<td>1. Ideas Catalysis and Concepts Exploration</td>
</tr>
<tr>
<td>3. Optimal Innovation Portfolio</td>
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</tr>
<tr>
<td>4. Innovation Pipeline Acceleration</td>
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### Approach

- **Consulting / Advisory**
  - Lead innovation strategy and projects implementation from market insights to go-live and post-launch results
  - Bring focus to new potential brands and new product opportunities, ensuring right resourcing for innovation
  - Overcome obstacles to ensure projects are delivered on time and within budget
  - Track ongoing results and fine-tune the organization’s efforts to improve them

- **Interim Management**
  - Lead all consumer and shopper research projects in a cost and time efficient manner
  - Develop an area and provide ongoing consultation on shopper and consumer issues throughout the organization
  - Build short and long term insight plans to support product innovation and general brand management

### IV. About Us

**A shortlist of our MARKETING and INNOVATION capabilities**

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</tbody>
</table>

- **Consulting / Advisory**
  - Run dynamic Innovation workshops putting together creative and analytic profiles with company’s key stakeholders and/or cross-functional teams (Marketing, Sales, R&D, Manufacturing, Logistics, Customer Service, Financial, Legal, …)
  - Lead and provide support to market insight research efforts (non-intrusive ethnographic, other qual and quanti research), bring coherency throughout briefing development, agency services deployment and results interpretation
  - Perform trendspotting and coolhunting search to bring relevant Food-for-thought on trends and opportunity windows
  - Bring focus to ideation/creativity/lateral thinking and help concepts pass through a first consideration on feasible alternatives

- **Interim Management**
  - Analyze current innovation pipeline and plans for NPD
  - Identify new potential innovation leads and their gap with current innovation capabilities
  - Develop models to prioritize initiatives, optimize resource allocation and to help project management
  - Balance initiatives across the innovation pipeline to increase success probabilities in the short, mid and long term

- **Consulting / Advisory**
  - Analyze the organization and processes involved with innovation and NPD and advise opportunity gaps
  - Determine the ideal organization and processes to accelerate innovation and its fit with current organization
  - Create an Innovation Acceleration Strategy and help the organization to deliver roll-out recommendations

- **Interim Management**
  - Advice fine-tuning opportunities and alternatives (Brand, Packaging, Price-point, Range, Positioning, …)
  - Define feasible options, run market screening research and fine-tune the product
  - Prepare product launch (Marketing communication and PR planning / setting up, sales training, logistics follow-up, system entries, price policies, field-marketers scheduling, key account presentation / negotiation materials, …)

- **Consulting / Advisory**
  - Define shopper marketing strategy, specific goals per brand, segment, account, …
  - Lead shopper specific research to understand shoppers’ psychology at the POS / POC
  - Perform shopper clusters analysis and define ideal assortments, merchandising, price and promotion guides per cluster
  - Design efficient workflows and plans to develop shopper marketing competencies
LET US BE YOUR BEST PARTNER!

Contact: Francisco Pestana
eMail: fpestana@advisium.net
Phone: (+34) 630-864-623

Marketing
Convince shoppers and delight consumers

Innovation
Seed the ideas of tomorrow's success

Strategy
Move your business towards new dimensions

Learn more about us at: www.advisium.net