



Label

Inspired by craft
Flavour creations for refreshing craft lemonades

Content

// Macro Trends & Micro Trends within the beverage segment

// What is craft?

// Market insights

// Bell's flavour creations for craft lemonades

// Contact

// HEALTH & WELLNESS MACRO TREND

BALANCE YOUR SCALES



The **mega trend Health & Wellness** still gains momentum and will **play a decisive** role within the food and beverage industry in future.

- Customers have realised that there is a possible **relation** between **nutrition** and **personal well-being** and **health**
- The “**Age of thoughtful consumption**” has reached mainstream
- **The growing importance of selected ingredients, origin and production methods reflects this trend in the beverage category**

// MICRO TRENDS WITHIN THE BEVERAGE SEGMENT

NEW ALLROUNDERS AND LESS IS MORE



In keeping with the health & wellness trend, **functional beverages** are becoming increasingly important. To be in-line with functionality needs, vitamins, minerals and other dietary supplements were added.

- A balanced **sweetness** is indispensable for an **intense taste experience**
- Consumer's demand for **sugar- and calorie reduction** is growing
- **Sugar substitutes** (Stevia, Sweeteners and many more) gain importance

No/Less sugar + 600%
(increase in New Product
Developments in 2017)

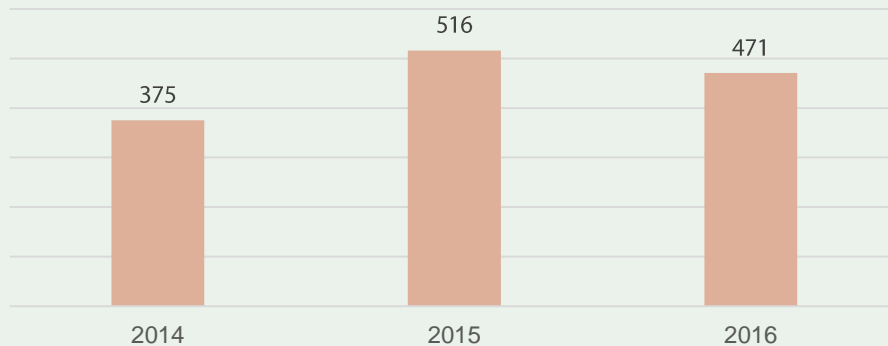


// MICRO TRENDS WITHIN THE BEVERAGE SEGMENT

NATURAL, ORGANIC GLORY

- Continuously growing market for **organic products** → Consumer's aspire for natural products and Clean Labeling
- Rising number of organic, natural products within the softdrink segment

Number of NPD in CSDs | Europe | Claim organic/natural



// AUTHENTICITY & NOSTALGIA MACRO TREND

TRUST IS TRUMP

- **Authenticity** gains more and more importance in our **fast moving society**
- Stands for **quality**
- Creates the feeling of **familiarity** and **security**
- **Vintage/Retro** trend
- **Return to the past**
- **long-term, emotional attachment** of consumers to a particular **brand** or product.



// AUTHENTICITY & NOSTALGIA MACRO TREND

DO IT YOURSELF AND BE LOCAL



- Return to **traditional**, but **extraordinary ingredients** (e.g. herbs, spices, vegetables in softdrinks)
- **Origin** of the ingredients is important – **local** products are a big bet
- Traditional recipes and use of **traditional production methods**
- **DIY** mentality shows consumers demand for authenticity
- Origin, Past and Honesty as a new **seal of quality**
- **BIGGEST SUCCESS IS SHOWN IN THE CRAFT MOVEMENT**

// WHAT IS CRAFT?

TRADITION Local
VINTAGE Origin
Honesty
Premium
Trust
CRAFT
ARTISAN
HANDMADE
Quality



// WHAT IS CRAFT?

ORIGIN OF THE CRAFT MOVEMENT

- The craft movement has **started** in the **U.S.**
- Meaning of the word craft = „**handmade**“
- A large number of small, independent craft beer breweries has significantly shaped & changed the beer market



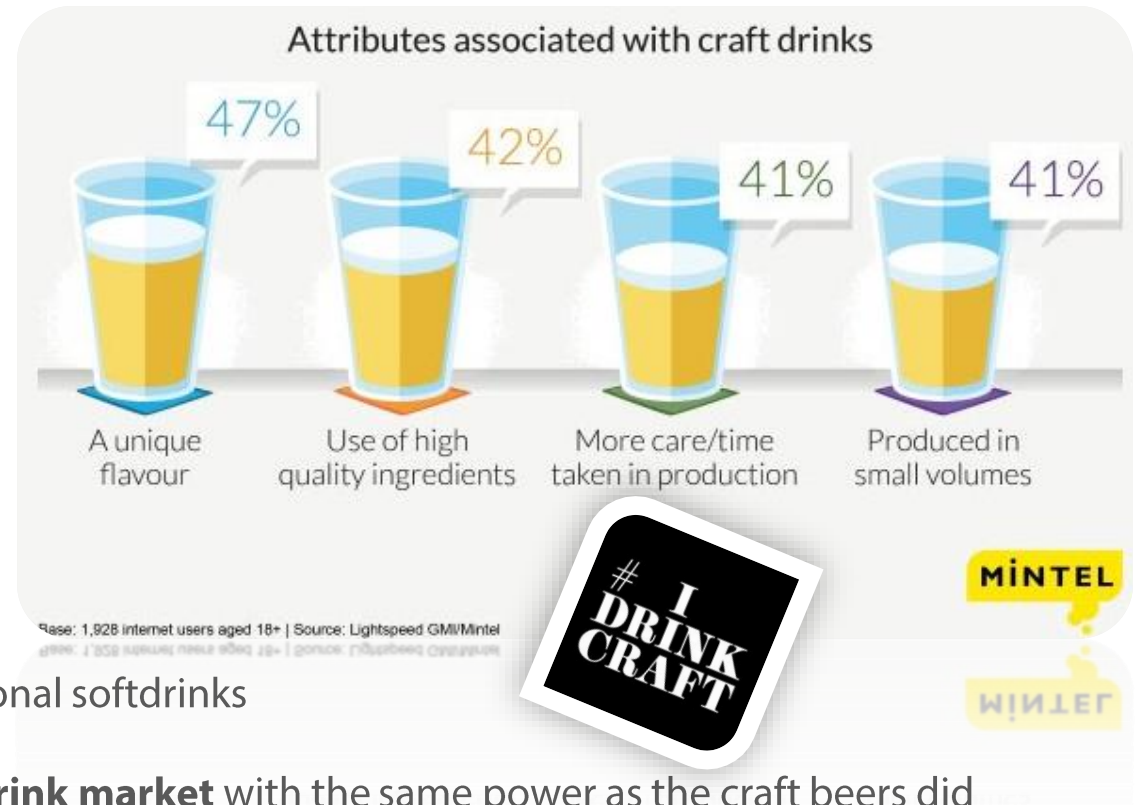
Beer [any food & beverage] brewed [produced] by small, independent brewers [manufacturers] using traditional ingredients.

American Brewers Association

// WHAT IS CRAFT?

CRAFT = BEER?

- The craft movement has already **reached** the **softdrink** category
- **Craft lemonades** serve the consumers demand for **traditional, organic and healthy ingredients** and **handmade** products
- Seen as **healthy alternative** to conventional softdrinks
- Craft lemonades will **shake up the softdrink market** with the same power as the craft beers did
- Big Players (e.g. Pepsi) also include craft lemonades in their portfolio – „**If you can't beat them, join them**“



// WHAT IS CRAFT?

CRAFT LEMONADE IS AN EXPERIENCE – NOT A HABIT



- Creates new, varied **flavour experiences**
- **Traditional**, but also **exceptional ingredients** like fruitblends, herbs and spices
- **Natural premium ingredients** & less/no sugar
- Extraordinary, trendy packaging design
- The segment of craft lemonades remains **on the growth path** and stands up to the ongoing downward trend within the softdrink market

// MARKET INSIGHTS

CRAFT LEMONADE – A NEWCOMER WITH STAR POTENTIAL



Sales volume in the U.S.
market

428 m. USD in 2011
541 m. USD in 2016

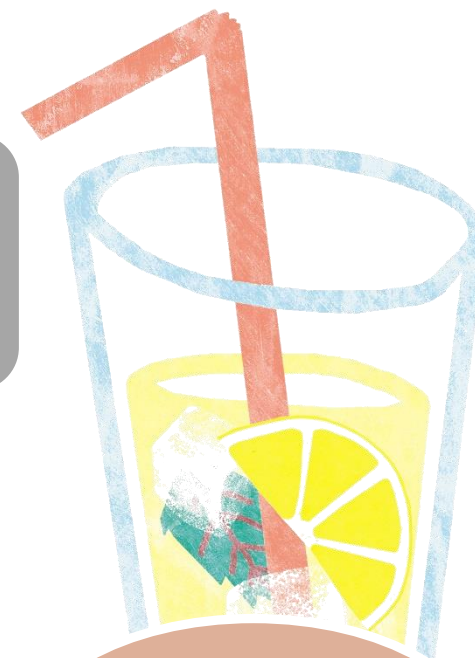
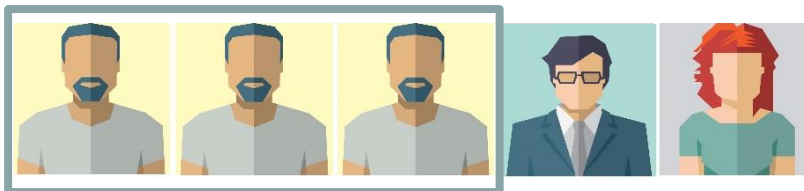
Growth in the U.S.
market

33,6 million litres in
2016 (+5,5% to 2015)

3 in 5 consumers agree that craft lemonades allow
them to enjoy a **unique indulgence**
3 in 5 americans **prefer** softdrinks with **natural**
ingredients

Millenials = Top target group

Prefer extraordinary flavour
experiences



44 % of non-craft
drinkers are
interested in trying
craft products

// MARKET INSIGHTS



BICKFORD, AUSTRALIA



STUBBORN BY PEPSI, U.S.



BUNDABERG, AUSTRALIA

// MARKET INSIGHTS



GUS SODA, U.S



JUST CRAFT SODA, PEAK DRIVE BEVERAGES, CANADA

// MARKET INSIGHTS



JOIA LIFE, U.S.



CRAFT SODA BY TUXEN BREWING, DENMARK



SIP SODA, CANADA

// MARKET INSIGHTS



FORT TREE SODA, U.S.



SODA FOLK, UK



SWELL SODA & CO, U.S.

// MARKET INSIGHTS GERMANY



BASILIKUM LEMONADE
BALIS GMBH, HAMBURG



PURE BY RIEDENBERGER BRAUHAUS,
RIEDENBERG



HELDENPAUSE GMBH,
HEIDELBERG

A close-up photograph of two glass bottles filled with a clear, refreshing beverage. The bottles are garnished with fresh ingredients: a slice of yellow lemon, a slice of green lime, and a sprig of green thyme. The bottles are set against a warm, blurred background. A semi-transparent text box is overlaid on the right side of the image.

Inspired by craft

Discover Bell's inspiring flavour creations for
refreshing craft lemonades

BLACKBERRY & ROSE

17PW161

0412747 Rose Flavour

3450109 Blackberry Flavour nat.

0487825 Rose Blossom Extract

- Carbonation g/l 6,0
- °Brix refr. 7,9
- as. Citric Acid g/l 1,7
- Juice % 8,0

Ingredients: carbonated water, sugar, fruit juices from fruit juice concentrates (orange, lemon, blackberry) , natural flavouring, rose blossom extract, coloring plant extract (carrot)



RUSSIAN MALT

17PW160

0412579 Plum Extract

0410225 Plum Flavour nat.

0550175 Baykal Flavour nat.

- Carbonation g/l 6,0
- °Brix refr. 8,8
- as. Citric Acid g/l 2,0
- Juice % 15,7

Ingredients: carbonated water, sugar, fruit juices from fruit juice concentrates (plum, lemon), malt extract, natural flavouring, plum extract, coloring food concentrate (carrot), roasted malt extract, stabiliser quillaya extract



RUSSIAN MALT

17PW176

0412579 Plum Extract | 0410225 Plum Flavour nat. | 0550175 Baykal Flavour nat. | 0528362 Bread Flavour nat.

- Carbonation g/l 6,0
- °Brix refr. 8,1
- as. Citric Acid g/l 2,0
- Juice % 6,7

Ingredients: carbonated water, sugar, fruit juices from fruit juice concentrates (plum, lemon), natural flavouring, roasted malt extract, plum extract, coloring food concentrate (carrot), stabiliser quillaya extract



MADAGASCAR BARREL

17PW129

**0416828 Oak Wood Extract | 3450115 Cider
Flavour Apple Type | 3450113 Walnut
Flavour | 0506535 Cocoa Flavour**

- Carbonation g/l 6,0
- °Brix refr. 8,0
- as. Citric Acid g/l 2,0
- Juice % 33,9

Ingredients: carbonated water, sugar, apple juices from apple juice concentrate, natural flavouring, extracts (oak wood, walnut), roasted malt extract, antioxidant ascorbin acid, stabiliser quillaya extract



POMEGRANATE & MINT

17PW158

0550067 Pomegranate Flavour nat. |
2120005 Nana Mint Extract | 3550068
Mint Flavour

• Carbonation g/l	7,0
• °Brix refr.	8,2
• as. Citric Acid g/l	1,9
• Juice %	16,0

Ingredients: carbonated water, sugar, fruit juices from fruit juice concentrates (pomegranate, lemon), natural flavouring, mint extracts, coloring food concentrate (carrot)



// Contact

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