

# Carlsberg WOW in innovation

# Our current sail 2022 strategy is guiding every innovation we brew



## URBANISATION

90% of beer consumed in cities by 2050



## GENERATIONAL SHIFTS

1/10 EU youngsters stopped drinking beer



## GENDER EVOLUTION

We can't ignore 51% of the population



## SMART AND CONNECTED

Digitalise or die!



## HEALTH AND WELLNESS

4/5 don't see beer as part of a healthy lifestyle



## SENSORY AND INDULGENCE

Two new craft breweries open every day



## SUSTAINABILITY AND ETHICS

Behave... or you are out!



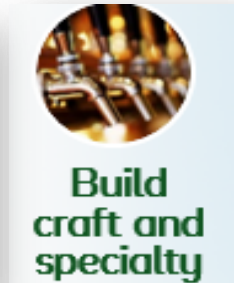
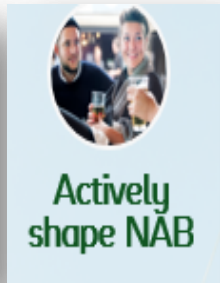
## GOVERNMENT POLICIES AND REGULATIONS

Drive consumption down but not tax income

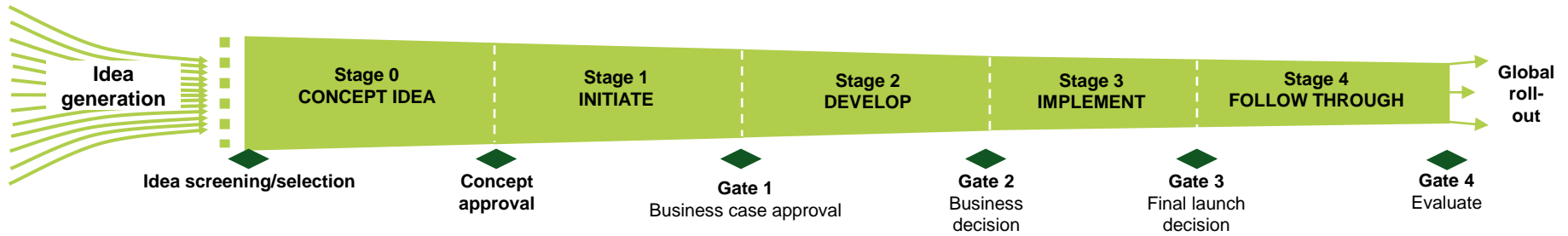
# Our flavour suppliers onboarded with us on Sail 2022

**We are on a journey to revitalize our business and we need support of our flavours suppliers to stay onboard during this restructuring period**

- Complexity reduction – creation and extension to couple of markets
- Continue support on innovations of our local markets
- Getting their market insights to get ready for the NPD's coming out of Sail 2022



# Our innovation process is encouraging real partnership



**Early involvement from stage 0 – invited internal kick off meeting**



**Full transparency in our process and WOW and success criteria**



**Yearly evaluation on pre-define criteria and feedback collected from all markets**



**Co-creative workshop – shared knowhow culture to leverage efficiency**



# Consumer trends

Consumer ask for products which are:

Traditional

Crafty

"Natural"

Tastier and more challenging

Special ingredients

Flavoured

Consumer friendly

Clean label



Future focal areas:

Less emphasis on flavourings

More focus on compound types and innovative ingredients

# We engage closely with suppliers to exchange on

- 🍷 Market insights during early phases of NPD
- 🍷 Insight in local legislation to secure compliance
- 🍷 Insights on consumer perceptions (natural/artificial)
- 🍷 Labelling recommendation (including information on preservatives, carriers etc)
- 🍷 Guidance on where/how in the process to add the material
- 🍷 Scale-up and implementation



THANK



YOU