



# NO & LOW ALCOHOL Innovation Book

A selection of Pernod Ricard AND competitors innovations

Welcome, Difference Maker!



A quick heads up....

This No & Low Alcohol Innovation Book has two parts for you to explore and form your own opinion on No & Low stakes:

- ✓ A selection of our in-house innovations tapping into that opportunity – *directly downloaded from the Innovation Pipeline!*
- ✓ A selection of competitors put together for you by the global innovation team.

For more about the 160+ innovations we have in market right now, do check out the Innovation Pipeline:

<https://innovation.pernod-ricard.com>

Oh, and while you're there, don't forget to update your own projects!

PS: you can now enter your services & experiences as well...

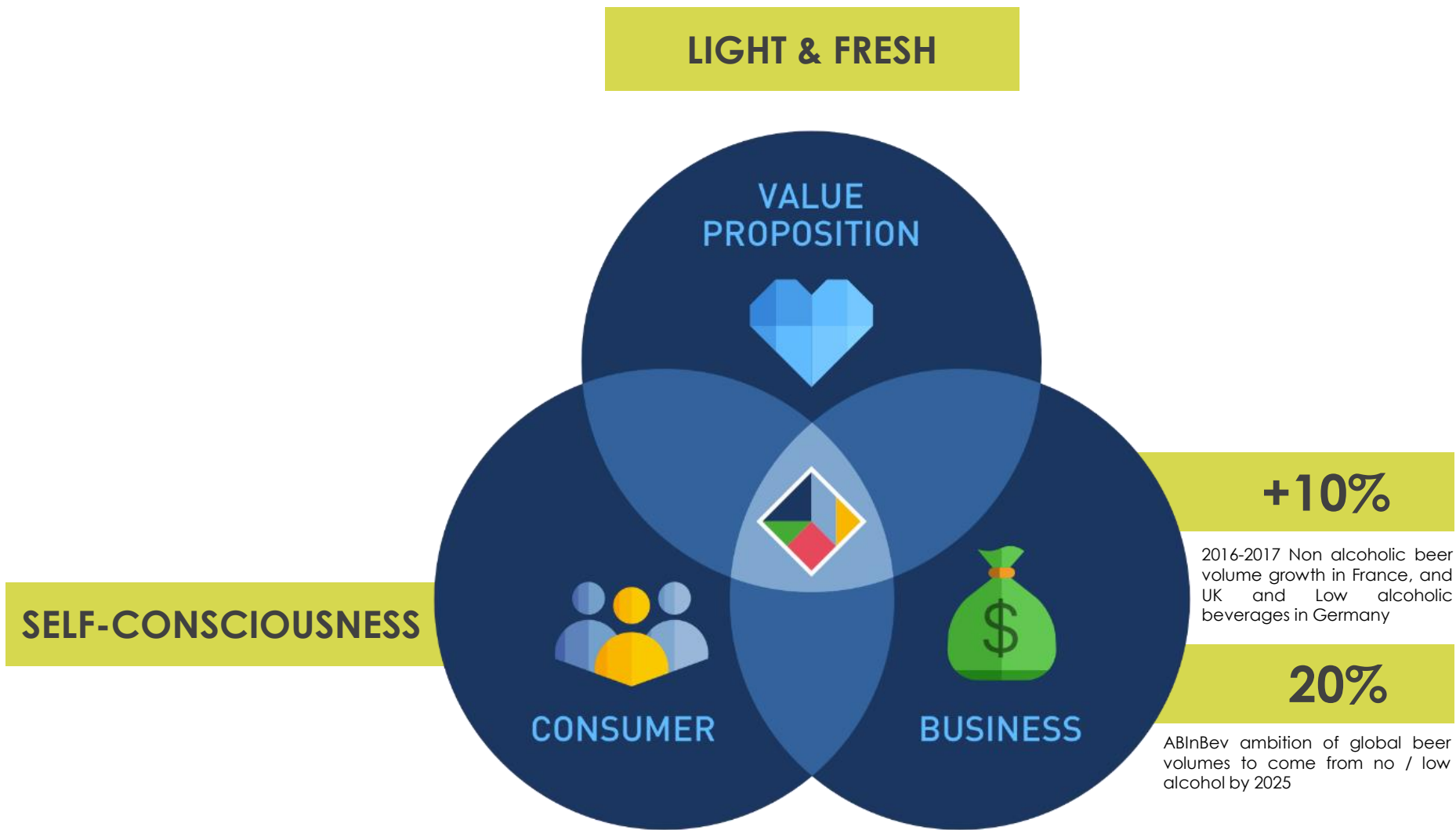


# NO & LOW?



## HAVE YOU NOTICED...?

Consumers are increasingly demanding lighter and alcohol-free drinks that provide a great adult and convivial experience. Soft beverages are having a look at more grown up drinks (ie. Schweppes Virgin Mojito) and beer manufacturers are going for non-alcoholic versions of their core products (ie. Heineken 0.0). From the Diageo's communication push around Seedlip to the numerous Mocktails (alcohol-free versions of well-known cocktails) popping up in every bar... Various types of actors are already starting to seriously address this behavioral change among consumers ...  
What should be Pernod Ricard's answer to this new behavior?



## KEY LEVERS OF SUCCESS

- DRINKING RITUALS
- ADULT TASTE
- EXPERIENCE

## OPEN QUESTIONS FOR PERNOD RICARD

- ✓ WHERE WOULD WE CREATE THE MOST VALUE BETWEEN NO AND LOW ALCOHOL?
- ✓ SHOULD WE GO WITH OUR CORE BRANDS (AND WHICH ONES) OR NEW TO WORLD BRANDS?
- ✓ HOW TO DELIVER GREAT MOUTHFEEL, TASTE AND MASTER DEALCOHOLIZING TECHNIQUES?



# OH, AND...

HAVE YOU SPOTTED A CRAFT INNOVATION IN YOUR MARKET?

DO YOU HAVE AN OPINION TO SHARE?

WANT TO GET INVOLVED IN TRANSVERSAL WORKS ABOUT CRAFT?

...

*SEND US AN EMAIL*







Pernod Ricard  
Global Business Development

# Pernod Ricard NO & LOW innovations







Market introduction: 05/2013



Feminine Identity

Consumer insight

"Sharing elegance brings lightness to the essential": I look for premium, low abv, refreshing drinks for socializing or relaxing moments with my couple or friends.

Story

Lillet is a subtle blend of french wines and fruit infusions made in Podensac, Bordeaux region. Created in 1872 by brothers Paul and Raymond, Maison Lillet has kept its uniqueness, relying on strong French heritage and know-how. In the 30s Lillet was served on exclusive occasions and at official receptions, soon becoming the aperitif in vogue all over the world, conquering later the most trendy NY venues. Today, consumers have rediscovered it on elegant Spritzer recipes while connoisseurs and mixologists have made it an essential of cocktails.



Why invest in this innovation?

Female empowerment and Low Proof trends become increasingly topical worldwide, both business opportunities for the brand. Lillet sales performing positively by the end of FY'17 (+30.4%) on key markets: Germany(+46.3%), France(+15.4%) and USA(+3%). Brand depletions reach +18,5% (IWSR'16). Aperol, continue growing double digit in key markets as France, Switzerland, Benelux, USA and UK despite a limited product range and one single drink strategy.

[Page My Brands](#), [Video URL](#)



## 35 BY IMPERIAL

Market introduction: 12/2016



Better for Me

### Consumer insight

They prefer simplicity vs. complexity, comfort vs. luxury, and fun vs. serious in casual bonding occasions.\* Consumer ethnography research video : <https://vimeo.com/255487143> (Password :3535)

### Story

We identified a new target consumer group for the brand (down-to-earth buddies) looking for more casual drinking occasions. We called that untapped opportunity the TRUE position (authentic, smooth, inclusive, casual and fun). To support the execution of the new positioning, a product story (The pursuit of smoothness) and brand experience (buddies playground) was also defined. \* Consumer ethnography research video : <https://vimeo.com/255487143> (Password :3535)



### Why invest in this innovation?

The rapid growth of the low-abv trend in the local whisky category is the new opportunity for Imperial to build market awareness. Compare to competitors' products, 35 by imperial has unique brand proposition for consumers: Down-to-earth buddies in their 30's to mid. 40's who value friendship and trust, and seek genuine experiences. They prefer simplicity vs. complexity, comfort vs. luxury, and fun vs. serious in casual bonding occasions.



# CINZANO SPRITZ

Market introduction: 04/2015



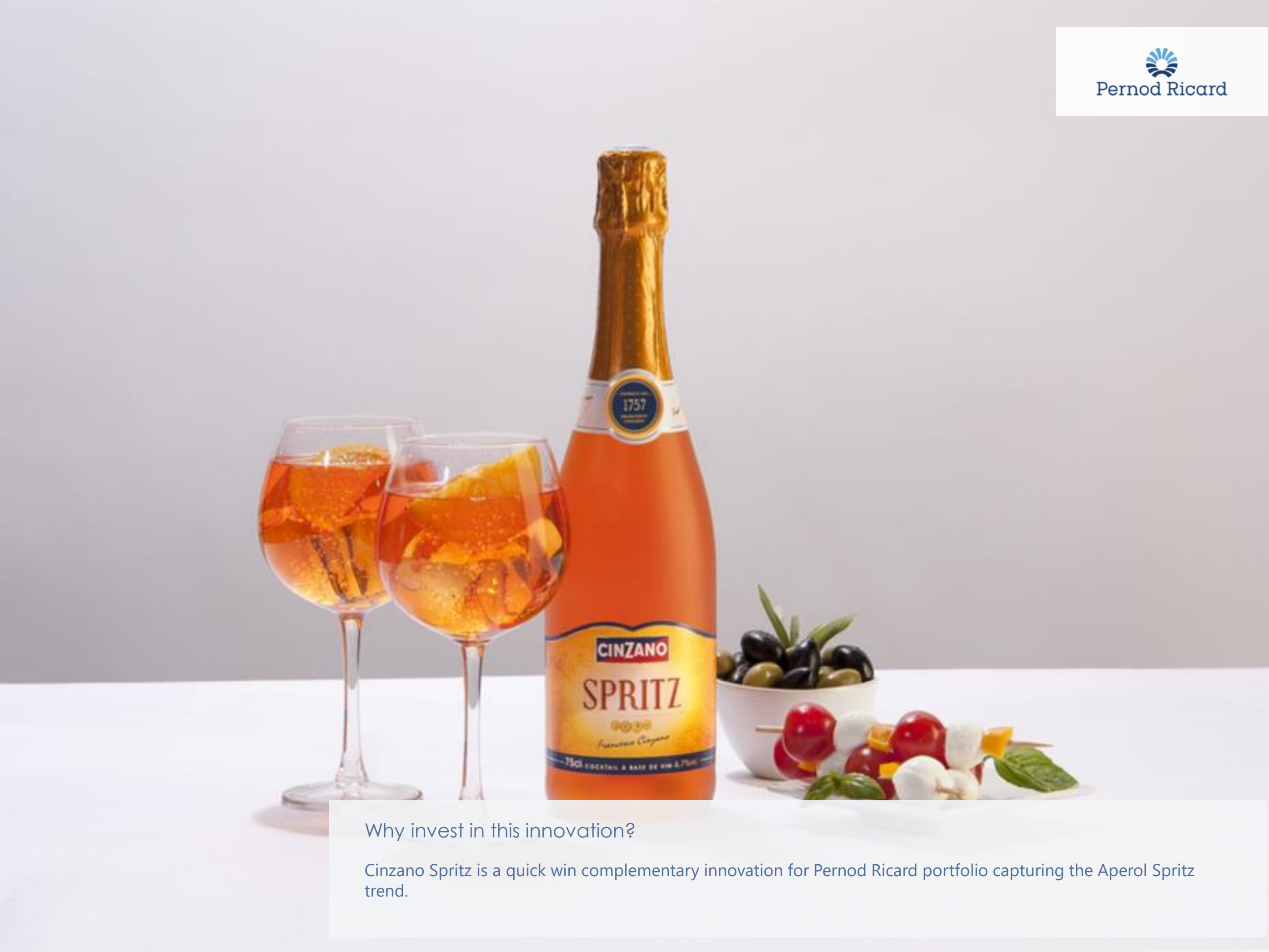
Easy at Home & Everywhere

## Consumer insight

I want to drink a good Spritz cocktail easily and quickly. No recipe to follow: the cocktail is always tasty without any bad surprise.

## Story

Cinzano Spritz is a quick win innovation. It has been launched tactically in France with very low investments and is now a growth relay for Pernod with 700K€ CAAP.



## Why invest in this innovation?

Cinzano Spritz is a quick win complementary innovation for Pernod Ricard portfolio capturing the Aperol Spritz trend.



PR Winemakers • Jacob's Creek

# JACOB'S CREEK UNVINED

Market introduction: 07/2014



 Easy at Home & Everywhere

### Consumer insight

"I like the sophistication of wine but I find it too high in alcohol when I want a few drinks catching up with my friends".

### Story

Jacob's Creek launches its first alcohol-free wine, maximizing growing trend to reverse a declining brand in alcohol-monopolized Sweden.



### Why invest in this innovation?

Upholding the Jacob's Creek philosophy of quality winemaking, UnVined is a de-alcoholised wine showcasing true varietal profile, while extending to more occasions with less than 0.5% alcohol volume.



# RAMAZZOTTI APERITIVO ROSATO

Market introduction: 07/2014



 Feminine Identity

## Consumer insight

"I want a fresh and light aperitif when I'm hanging out with my friends in cocktail bar or restaurant.

## Story

Made in Italy, Ramazzotti Aperitivo Rosato is the essence of Italian gaiety and number one digestive in Germany.It perfectly embodies light and sparkling aperitifs to eat with friends with its hibiscus and orange blossom aroma that gives it a fresh, fruity and sweet taste. The light pink color completes its uniqueness, making it a perfect choice in the glass, mixed with prosecco, ice and basil, (Rosato Mio), with tonic water, ice and fresh lime (Rosato Tonic) or served in more elaborate cocktails.



## Why invest in this innovation?

The light spirit aperitif segment is showing a strong global growth by +4,8 (CAGR 11-16 in Volume) so it's necessary to continue to invest into this segment. Ramazzotti is an italian brand that is even more credible in this type of market because in Italy was born the habit to drink a light aperitif together with some light food pairing.

[Page My Brands](#)



# RICARD PLANTES FRAÎCHES

Early stage



Human Authenticity

## Consumer insight

I like pastis, but I must admit that it does not always fit the atmosphere of aperitif moments, when discovery, indulgence & pleasure of receiving are at the heart. (Target: Bons Vivants connoisseurs)

## Story

In 1932, Paul Ricard created his well-known « Pastis de Marseille », inspired by aromatic ingredients of Provence. Once again inspired by his origin, Ricard offers today a new recipe : Ricard Plantes Fraîches. This fresh and subtle pastis is elaborated with anise exclusively coming from fresh plants, thoroughly cultivated by local producers, harvested and distilled the same day in Haute-Provence. Shaped by more than 80 years of know-how, they offer unique aromatic qualities : a very fresh aniseed profile, spiced with subtle plant flavour



## Why invest in this innovation?

There are 3 main reasons to back Ricard Plantes Fraîches : 1/ The proposition is an answer to key consumer trends : Valorization , Naturalness and Genuiness, for consumers that are more than ever looking for true and qualitative products. 2/ The innovation is consistent with Ricard brand compass based on the authenticity of the French popular culture. 3/ The Aperitif moment is a key occasion in France and offers high business potential.



# STONELEIGH LIGHTER

Market introduction:



 Better for Me

## Consumer insight

“I like the sophistication of wine but I find it too high in alcohol when I want a few drinks catching up with my friends”.

## Story

Capture potential of premium lower in alcohol wines in NZ with a naturally lighter expression



[Page My Brands](#), [IBP content](#)



# THE SMOOTH BY IMPERIAL

Market introduction: 11/2017

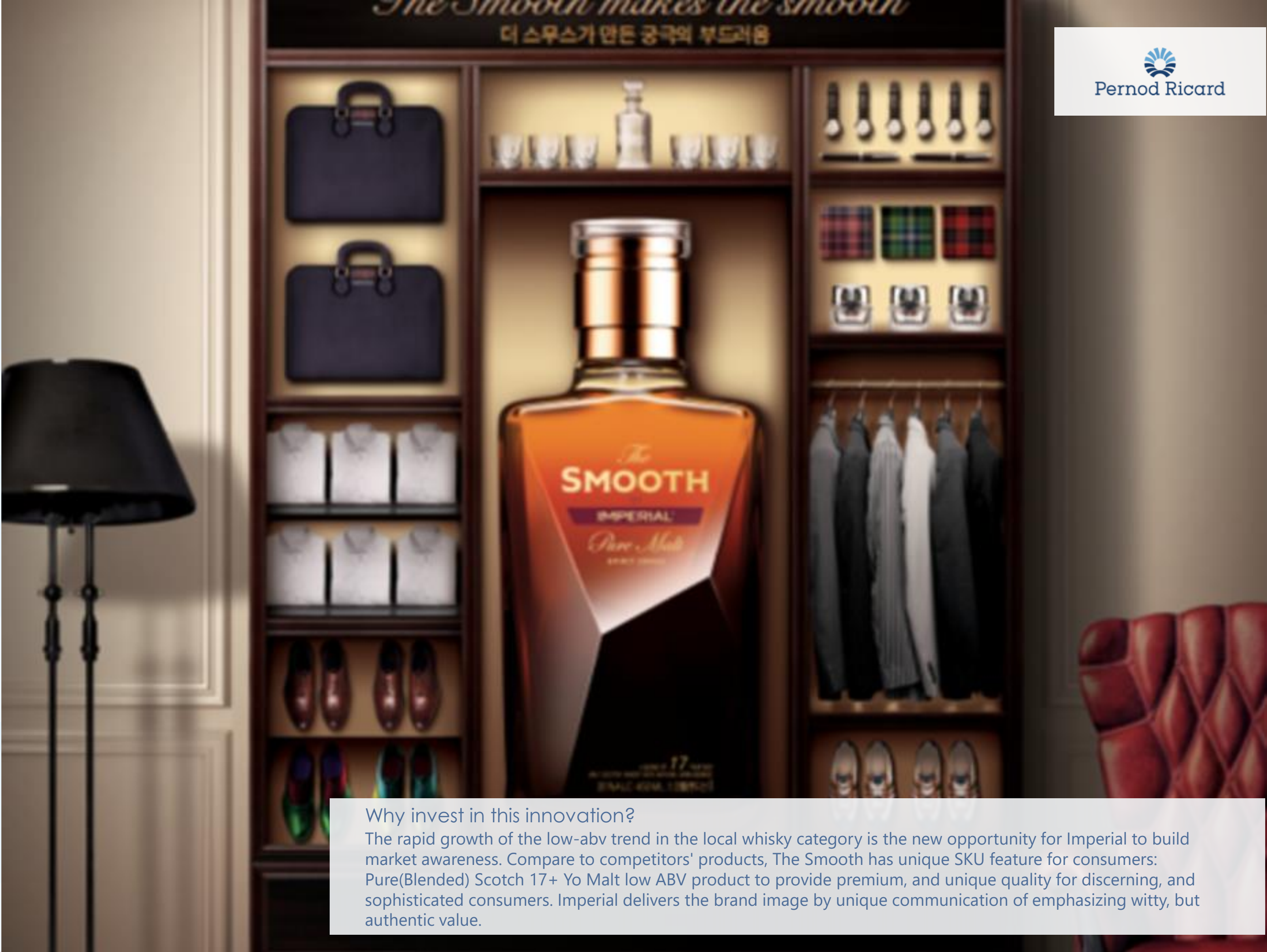
Business driven

## Consumer insight

Discerning and influencing men with authentic style and good taste among down-to-earth buddies looking for a differentiated and premium quality of low ABV spirit, which is also suitable for business.

## Story

In the Korea's local whisky market, low ABV whisky portion is taking over 40% ABV whisky markets in Korea. Imperial brand developed 35 by Imperial to compete in super premium (12YO+) market. The Smooth by Imperial is our key product in deluxe premium (17YO+ ) market.



### Why invest in this innovation?

The rapid growth of the low-abv trend in the local whisky category is the new opportunity for Imperial to build market awareness. Compare to competitors' products, The Smooth has unique SKU feature for consumers: Pure(Blended) Scotch 17+ Yo Malt low ABV product to provide premium, and unique quality for discerning, and sophisticated consumers. Imperial delivers the brand image by unique communication of emphasizing witty, but authentic value.



Pernod Ricard  
Global Business Development

# Competitors' NO & LOW innovations





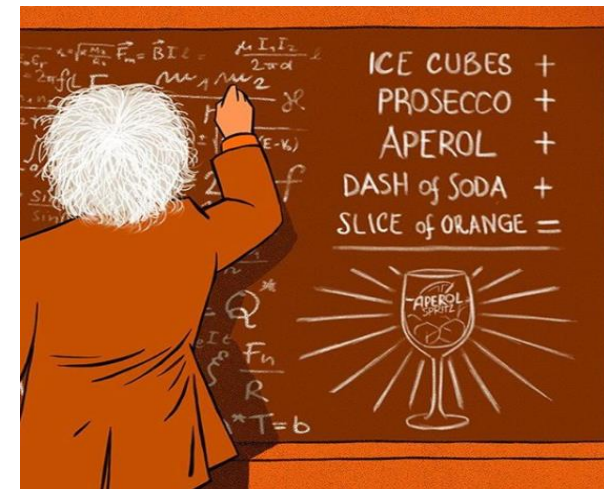


## Perfect Serve



Aperol Spritz



## Activations and Best Practices



Constant push of the perfect serve, so that Aperol is synonymous with 'spritz'.

# Campari Aperol

Launched in market 2003 (relaunch)

-  Better for Me
-  Aperitif

## Uniqueness

Aperol's signature serve is easy to make, and the price of the drink is reasonable. Aperol has a low alcohol content and is associated with 'natural' and 'fresh' summertime drinking.

## Story

Aperol was originally produced by the Barbieri company, based in Padua, but is now produced by the Campari company. While Aperol was originally created in 1919, it did not become successful until after World War II.





## Perfect Serve



No perfect serve

## Activations and Best Practices



Borrigo partners with well-known tonic companies, like Fever Tree, to raise the brand profile.

Borrigo

# Borrigo

Launched in market 2017



Better for Me



Non-Alcoholic

## Uniqueness

This is a botanic spirit without alcohol. It contains no sugar, no fat and no calorie, while being allergen and gluten free.

## Story

Borrigo is named after the Latin classification name for borage, a bright blue edible flower. It is natural delicious, colourful, beautiful and multi-faceted. Borrigo pairs deliciously with mixers to give a fragrant and delicious zero-proof, botanical non-alcoholic spirit. The beautiful bottle has presence and the whole ensemble creates a wonderful celebratory moment. A proper drink, with theatre, style, taste and fragrance.





Perfect Serve



Cointreau Blood Orange  
Spritz

Activations and Best  
Practices



Positioning seems to be  
direct competition to  
Aperol spritz and other  
aperitifs.

Remy Cointreau

# Cointreau Blood Orange

Launched in market 2017



Human Authenticity



Liqueur

Uniqueness

The perfect balance between  
sweet, bitter and blood orange peels,  
Cointreau Blood Orange is like tasting a  
ripe fruit, a new taste experience, both  
tangy and rich in aromas. 30% ABV.

Story

The Master Distiller of la Maison Cointreau,  
sought out the fruitiest and most flavoursome  
blood oranges in Corsica. The unique  
combination of the mild Mediterranean climate  
and the rugged Corsican soil gives the blood  
orange its vitality, intense aromas and exquisite  
taste. She continued the Cointreau quest in  
expressing artfully the notes of the fruit and  
brought a whole new dimension to them,  
through distinctive vibrant notes unique to  
blood oranges.





## Perfect Serve



Chilled in a champagne flute or with fruit syrup

## Activations and Best Practices



The bottle's packaging is very similar to regular, alcoholic champagne so as not to isolate potential consumers.

Stand-alone brand

# Festillant

Launched in market 2015



Better for Me



Non-Alcoholic

## Uniqueness

Even though Festillant has a similar taste profile as champagne or sparkling wine, this is completely non-alcoholic and made from de-alcoholised wine.

## Story

The spirits company – a jewel in the Loire Valley's Anjou-Saumur region – was founded by Alfred Gratien in 1864, then aged just 23, and in the same year he established the well-respected Champagne house that is his namesake. The 'Meyer' refers to Albert Jean Meyer, an enthusiastic wine expert from Alsace with whom Alfred Gratien joined forces ten years later in 1874, the same year of course in which The Society was founded. When Alfred died in 1885, the Meyer family was entrusted with the company and has continued to uphold its excellent traditions.





Perfect Serve



Chilled in a glass

Activations and Best Practices



Many of Heineken's advertisements indicate that the drink is 100% natural to appeal to health conscious drinkers.

# Heineken International

## Heineken 0.0

Launched in market 2017



Better for Me



Non-Alcoholic Beer

### Uniqueness

Heineken 0.0 is considered a 'perfectly balanced beer – but with no alcohol'. Made with their specific "A" yeast, 100% natural ingredients and a custom-made dealcoholization process, the new Heineken 0.0 is a real lager 0.0% alcohol.

### Story

Heineken's master brewers started from zero and spent years exploring, brewing, and tasting before they finally created a recipe defined by its refreshing fruity notes and soft malty body – perfectly balanced. One that deserves the Heineken mark. Of course with the uncompromising Heineken characteristics since 1873: natural flavors. Heineken taps into the growing cultural trend around the importance of responsible alcohol consumption and living a balanced, healthy lifestyle.



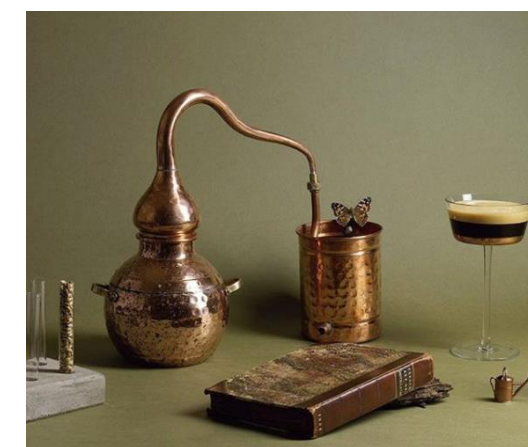


## Perfect Serve



No perfect serve

## Activations and Best Practices



Seedlip's social media emphasizes the drink's craft, copper and by-hand production process.

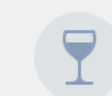
Diageo

# Seedlip

Launched in market 2015



Better for Me



Non-Alcoholic

## Uniqueness

Seedlip lets you participate in the drinking ritual without any of the alcohol. It's a botanic spirit with no alcohol, no sugar, no fat and no calories. It's allergen and gluten free.

## Story

In honour of this wild & natural world, the finest ingredients are harvested & individually cold macerated, distilled & then blended to capture nature's true spirit. Seedlip was founded by Ben in his kitchen in the woods, with a copper still & copy of The Art of Distillation to continue his family's 300 year farming ancestry & change the way the world drinks.