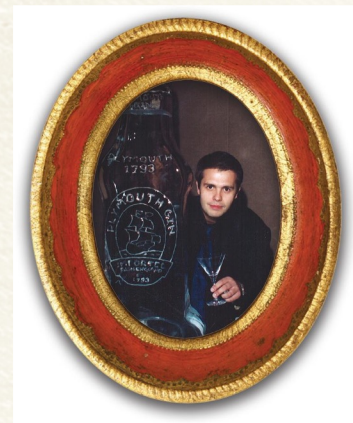


GOING GLOBAL

Simon Ford
Ginposium 2024



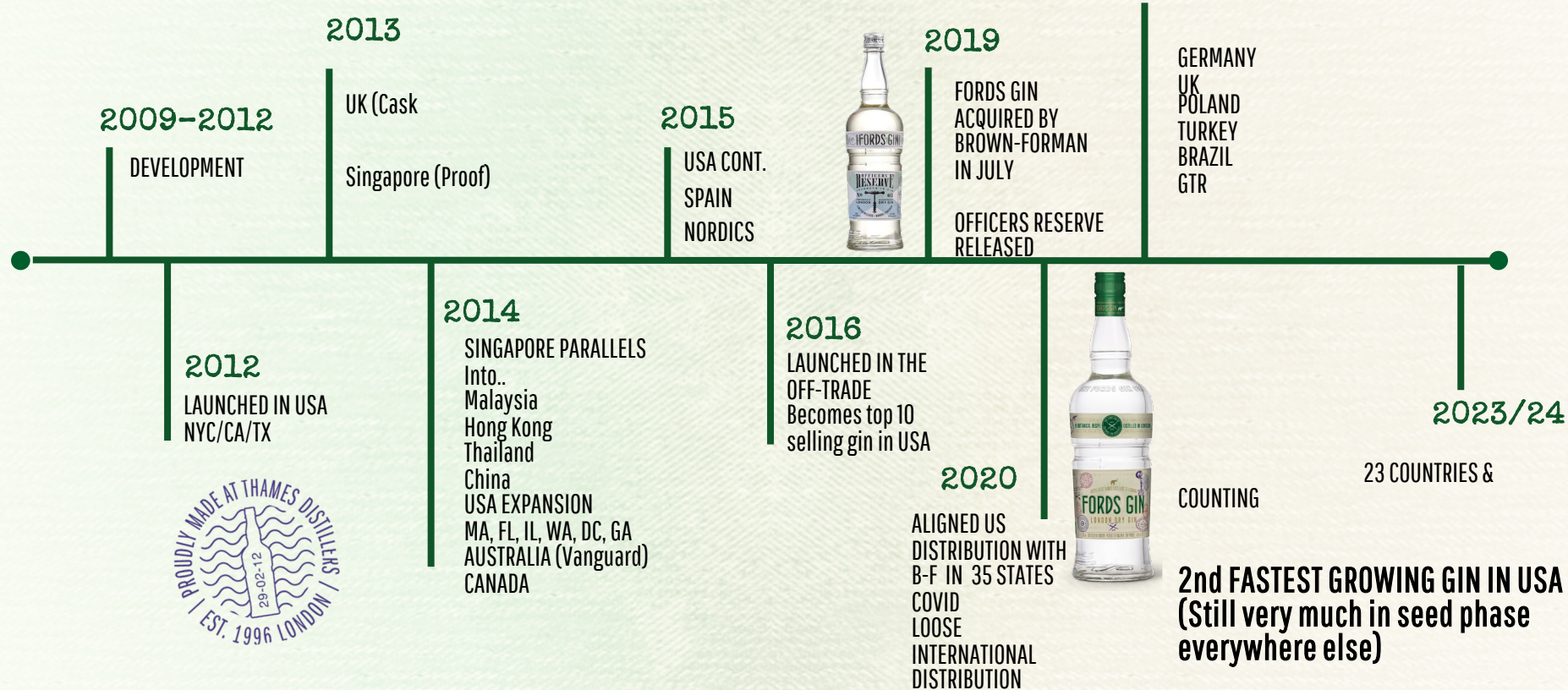
COCKTAIL CULTURE WAS STARTING TO SCALE





IT'S BEEN A JOURNEY...

MADE IN 500 LITRE STILL - THUMBELINA
STILLS BY JOHN DORE
BOTANICALS STEEPED 15HRS
- TOM THUMB



...but then came 2020

**CHUCK NORRIS HAS BEEN
EXPOSED TO THE CORONAVIRUS**



**THE VIRUS IS NOW IN QUARANTINE
FOR THE NEXT TWO WEEKS**



Day 1 of homeschooling/
quarantine life



And day 4



PUTTING A DRINK IN
EVERY ROOM OF MY
HOUSE TODAY AND
CALLING IT A
PUB CRAWL

**YOU CAN TAKE OUR
PUBS...**



**BUT YOU WILL NEVER
STOP ME DRINKING IN
MY KITCHEN!!**

FORDS GIN®

NOW IN 23 COUNTRIES

USA

BRAZIL

TURKEY

THE GIN MARKET

Size of the Prize

€12.8 Billion

Value of Gin Market Globally

**>100 Million 9L
cases**

Size of the Gin Market Globally

THE BIG PICTURE

- The global Gin category is over 100 million 9l cases and worth more than €12.8 billion and accounts for 4% of total TDS volume (x2 the size of tequila)
- The Top market by value is the US (sheer size of the spirits market there), followed by the UK, where Gin is the 3rd biggest spirits category in the market with a volume share of 15%
- While the boom is slowing and flavoured gin is suffering, there is strong opportunity in emerging markets in CIS, Asia Pacific and Africa









AT A GLANCE

RANK	COCKTAILS	MOVEMENT
1	NEGRONI	NON-MOVER
2	OLD FASHIONED	NON-MOVER
3	MARGARITA	NON-MOVER
4	ESPRESSO MARTINI	NON-MOVER
5	DAIQUIRI	NON-MOVER
6	WHISKEY SOUR	▲ 1
7	DRY MARTINI	▼ 1
8	APEROL SPRITZ	▲ 1
9	PALOMA	▲ 4
10	MOSCOW MULE	▲ 1
11	PENICILLIN	▼ 1
12	MANHATTAN	▼ 4
13	MOJITO	▲ 3
14	BLOODY MARY	NON-MOVER
15	GIMLET	▲ 6
16	AMERICANO	▲ 4
17	AMARETTO SOUR	▲ 6
18	CLOVER CLUB	▲ 4
19	MAI TAI	NON-MOVER
20	PISCO SOUR	▼ 8
21	LAST WORD	▼ 4
22	BOULEVARDIER	▼ 4
23	ZOMBIE	▲ 6
24	GIN FIZZ	▲ 1
25	FRENCH 75	▼ 10
26	SIDECAR	▲ 16
27	TOMMY'S MARGARTIA	RE-ENTRY
28	MEZCAL MARGARITA	▲ 7
29	PIÑA COLADA	▼ 2
30	GIN BASIL SMASH	▲ 3
31	PORNSTAR MARTINI	▲ 1
32	BEE'S KNEES	▼ 2
33	CORPSE REVIVER 2	▼ 5
34	NAKED & FAMOUS	NON-MOVER
35	AVIATION	▲ 8
36	BRAMBLE	▲ 5
37	WHITE LADY	RE-ENTRY
38	CARAJILLO	NEW ENTRY
39	DARK 'N STORMY	▼ 8
40	PAPER PLANE	NEW ENTRY
41	COSMOPOLITAN	▼ 1
42	VODKA MARTINI	▼ 6
43	SAZERAC	▼ 17
44	VIEUX CARRE	▼ 5
45	SINGAPORE SLING	RE-ENTRY
46	TOM COLLINS	RE-ENTRY
47	CAIPIRINHA	▼ 2
48	VESPER	▼ 11
49	JUNGLE BIRD	▼ 25
50	GIN-GIN MULE	RE-ENTRY

- The negroni has held the top spot in the drinks international cocktail report for the 3rd year in a row as the top cocktail in the world's top 100 bars.
- The Gimlet, Clover Club, Gin Basil Smash, Aviation and Bramble making gains up the ranks of top cocktails.
- 17 GIN COCKTAILS (more than any other category)

Key Gin Cocktail Average Annual Search Popularity Over Time

Worldwide

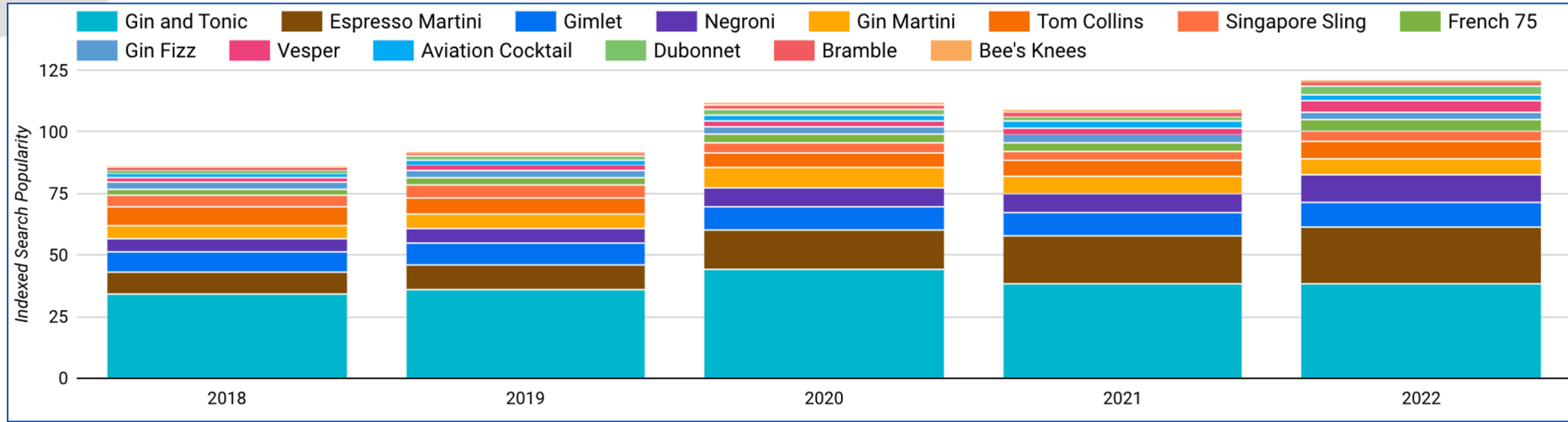


Chart illustrates average annual search popularity - indexed to a common high interest point.
An increase from year to year represents a stronger representative interest expressed through search behavior.

Global interest in the key gin cocktails analyzed illustrates an overall increase in interest over recent years.

Source: Google Trends
Date Range:
Jan 1 2018 - Dec 31 2022



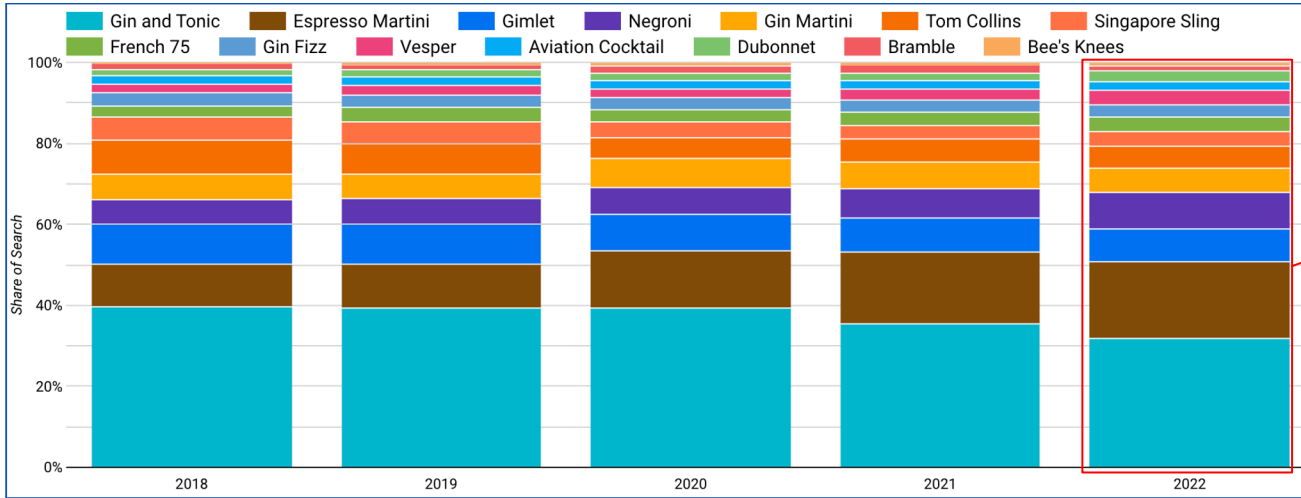
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COMMUNICATIONS

Key Gin Cocktail Average Share of Search

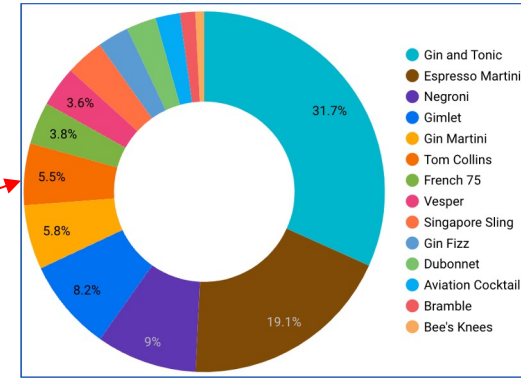
Worldwide



Share of Search - Year Breakout



2022 Share of Search



18

Chart Illustrates Share of Search Over Time (as an average monthly share of indexed search popularity)

Gin & Tonic has begun to lose share of search vs. other cocktails - with Espresso Martini and the Negroni capturing more share in particular.

Source: Google Trends
Date Range:
Jan 1 2018 - Dec 31 2022



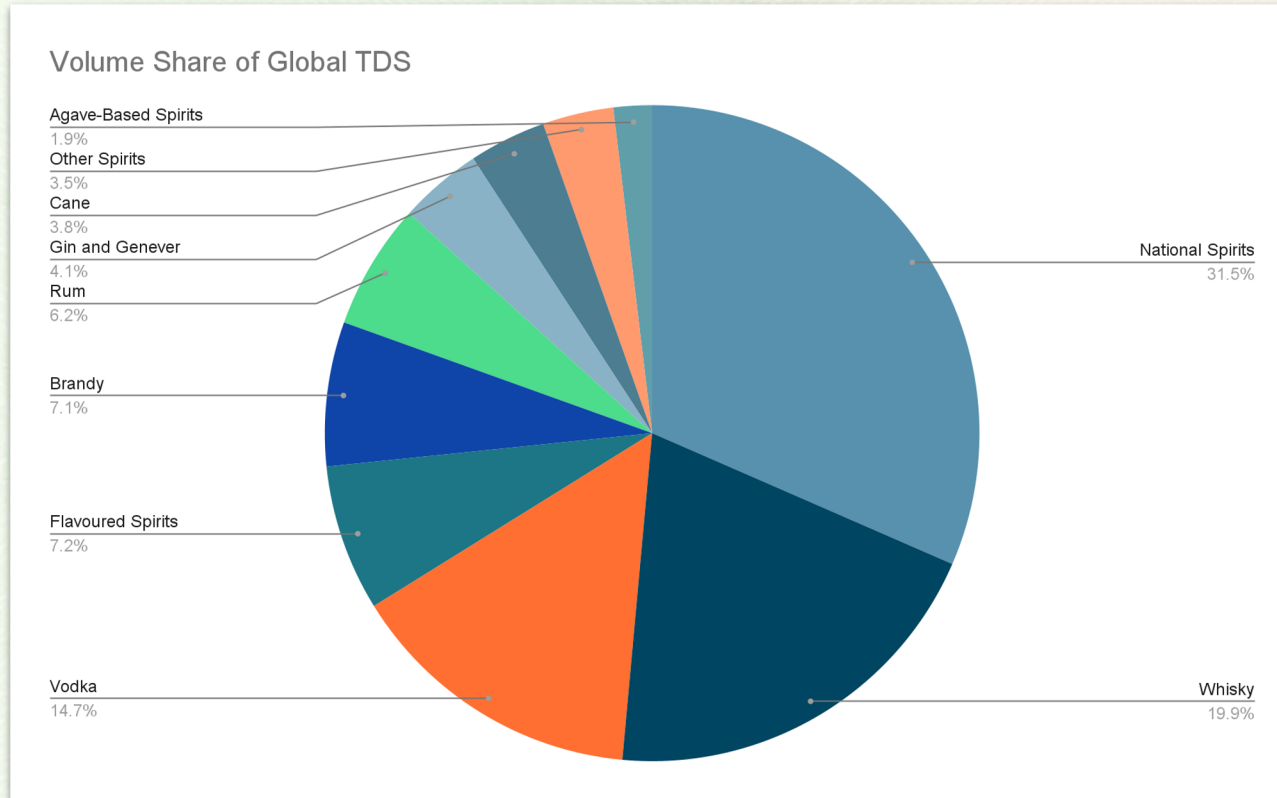
IMC INTEGRATED
MARKETING
COMMUNICATIONS

Top Gin Markets by Volume and Value

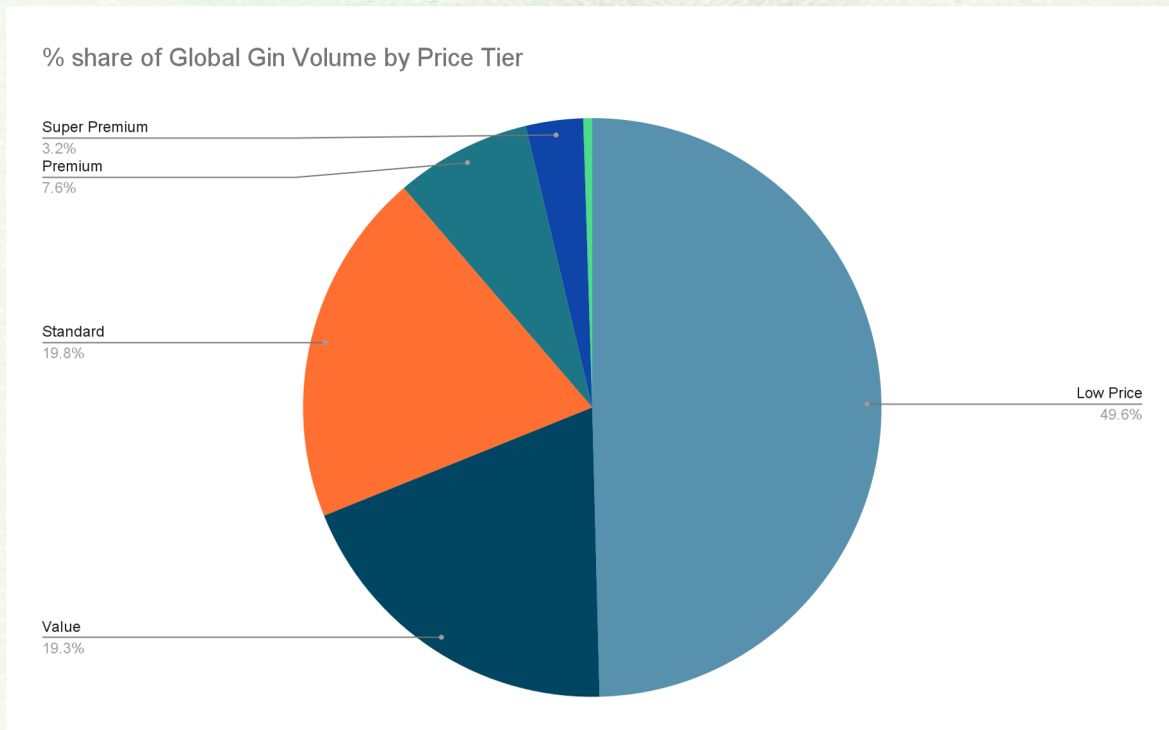
Top 10 Markets by Volume
Philippines
United States
Nigeria
United Kingdom
Spain
South Africa
Ivory Coast
Uganda
India
Russia

Top 10 Markets by Value
United States
United Kingdom
Philippines
Spain
Italy
South Africa
Australia
Germany
Canada
Nigeria

Gin accounts for 4% of total TDS volume globally x2 the size of Tequila



The bulk of the volume globally in gin remains low price, value and standard (driven by markets like The Philippines)



Overview of market trends for Gin - the boom is slowing, with flavoured gin in particular struggling; there are still big opportunities in emerging markets

Gin

The gin boom is slowing down, with focus shifting from Europe and North America to Asia and the CIS. Flavours, meanwhile, are starting to struggle

Strongest % growth in CIS

Gin growth was positive across all regions. In absolute volume terms, growth was highest in Asia, while CIS had the strongest growth in % terms, albeit off a very small base. The key markets in these regions are the Philippines and Russia respectively, with both dependent on local gins for the bulk of category volumes.

At the premium end, Italy was of interest, with volumes there growing more than 50% as the gin and tonic serve increasingly penetrates horeca and at-home consumption.

Flavoured gin slows notably

After seeing very rapid growth from 2018 to 2021, flavoured gin slowed down notably in 2022. It saw a steep decline in the UK, with "flavour-hunters" switching to vodka. No 2 market Spain

saw volumes nearly back to 2019 levels supported by on-premise recovery.

Premium+ gin comes off the boil

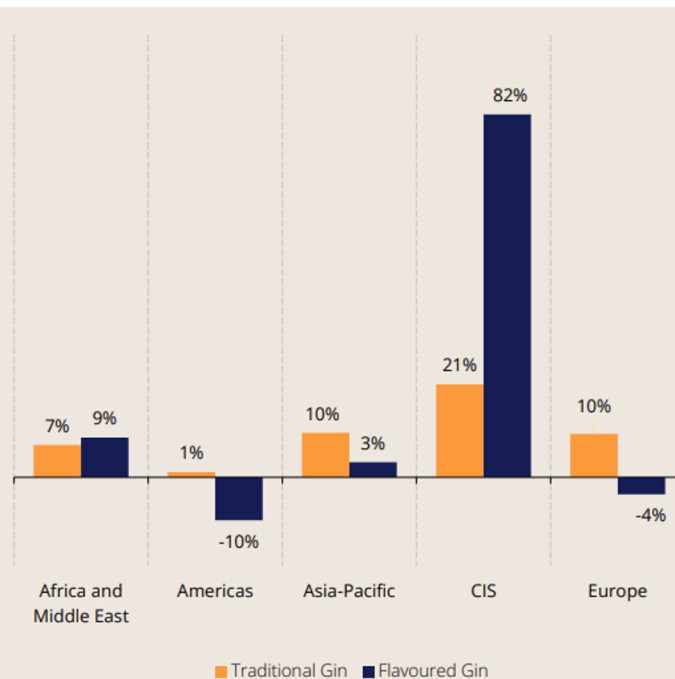
While all leading markets saw growth in premium+ gin last year, four of the Top 10 markets saw volumes decline in 2022. This was most pronounced in the UK, Australia and to a lesser extent Canada. These declines are attributed to consumer 'cooling off' the category and prices increases.

Philippines continues to thrive

Consumption in the world's leading gin market, the Philippines more than doubled since 2013. Despite some residual Covid-related restrictions in 2022, consumption grew strongly thanks to the return of the on-premise. Local gin dominates, but imports more than doubled in 2022 driven by a flourishing cocktail scene.

Traditional vs Flavoured Gin Performance 2021–22

Volume Change by Region (%)



Top Gin Markets by Volume, Value & Consumption per capita

Top 10 Markets by Volume
Philippines
United States
Nigeria
United Kingdom
Spain
South Africa
Ivory Coast
Uganda
India
Russia

Top 10 Markets by Value
United States
United Kingdom
Philippines
Spain
Italy
South Africa
Australia
Germany
Canada
Nigeria

Top 10 Markets by Consumption per capita
Philippines
Slovakia
Spain
Ivory Coast
Canary Islands
United Kingdom
South Africa
Ireland
Netherlands
New Zealand

Top Gin Markets by Volume - by price tier

Top 10 Standard Gin Markets	Top 10 Premium Gin Markets	Top 10 Super Premium Gin Markets	Top 10 Ultra Premium Gin Markets
United Kingdom	United States	United States	United States
United States	United Kingdom	United Kingdom	Germany
Spain	Brazil	Italy	Australia
Italy	Germany	Australia	Italy
Canada	Spain	Germany	United Kingdom
Japan	Canada	France	France
Germany	Australia	Spain	Austria
Kenya	South Africa	Canada	Norway
Greece	Italy	South Africa	New Zealand
Argentina	Mexico	Ireland	Japan

Size of Gin vs other categories - top 10 markets

Top 10 Premium and above Gin Markets
United States
United Kingdom
Brazil
Germany
Australia
Italy
Spain
Canada
South Africa
France

Note for Simon -
I put all price tiers
premium and above for
this. If you want the
actual volumes I have
them.

Biggest Brands

Top 10 Global Brands By Value

Value Ranking	Brand	Value (000s €)
1	Bombay	1,379,008
2	Tanqueray	1,304,542
3	Gordon's	1,303,820
4	Beefeater	782,316
5	Hendrick's	780,894
6	Seagram's	354,215
7	Roku	161,626
8	Whitley Neill	158,377
9	Malfy	136,764
10	New Amsterdam	108,274

Top 10 Global Brands By Volume

Volume Ranking	Brand	Volume (000 9l Cases)
1	Gordon's	5,457
2	Bombay	4,852
3	Tanqueray	4,644
4	Beefeater	3,452
5	Seagram's	2,049
6	Hendrick's	1,708
7	New Amsterdam	651
8	Gilbey's	512
9	Whitley Neill	403
10	Puerto de Indias Gin	379

Channel Trends

RISING COSTS AFFECT ON-TRADE

Overview: On-premise Challenges

The on-trade faces at-home consumption competition amid inflation and fast-changing ecommerce landscape

Global Beverage Alcohol
On-premise Share (Volume)

2019 **35%**
2020 **23%**
2021 **28%**
2022 **29%**

Netherlands

"High costs – of energy, staff, food and drink - are making life very hard for the on-premise. Further closures are expected in 2023 as a result"
– IWSR Analyst

Indonesia

"On-premise establishments are facing challenges as they strive to adapt and cater to the evolving preferences of local consumers"
– IWSR Analyst



Despite a worldwide relaxation of Covid restrictions in 2022 (except in China), on-trade venues are still facing intense competition from at-home consumption, a retained habit developed during the pandemic.

This challenge is exacerbated by inflation and the rapidly changing landscape of ecommerce. As consumers grapple with the increasing cost of going out, many are opting to recreate the experience in the comfort of their own homes.

Ecommerce platforms also pose challenges to the on-trade, providing convenience and a wide range of options, price comparisons, and reviews. Moreover, fast delivery services allow customers to create personalised entertainment spaces at home by ordering various products.

ON-TRADE STILL HASN'T QUITE BOUNCED BACK

On-premise: in depth

Post-pandemic progress: on-trade consumption makes strides, yet further recovery beckons

On the road to recovery

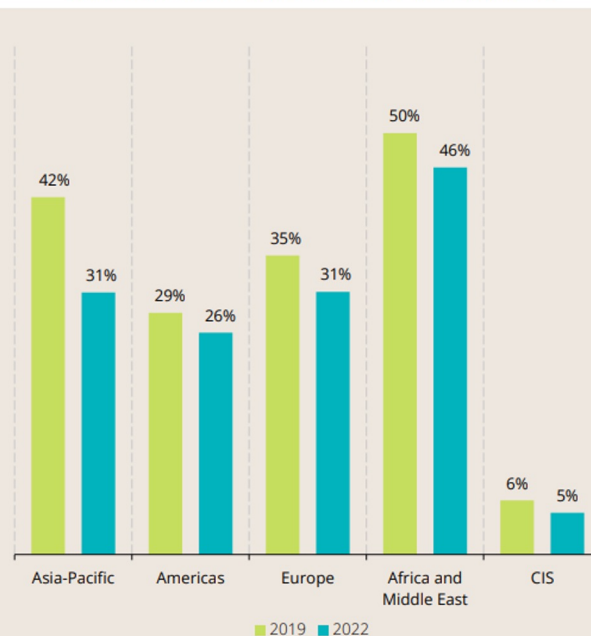
As most countries lifted restrictions on outdoor dining and gathering sizes, the on-trade industry experienced a resurgence. Specifically, America, Europe, and Africa and the Middle East witnessed growth in on-premise consumption in 2022 compared to 2021, although it remained below 2019 levels. In contrast, Asia saw a decline in on-trade volume to below 2021 levels, primarily due to the zero-Covid policy implemented in China, Hong Kong, and Macau.

Despite ongoing challenges including inflation and labour shortages, the on-premise sector remains on the path to recovery – it is not without obstacles, however. Many operators continue to develop their business models to cater for the evolving consumer. This involves changing opening hours and

menus to meet demand and adapt to new hybrid-working patterns. Some governments have stepped in to subsidised the hospitality industry in an effort to boost trade, but, in markets such as France, it proved more cost-effective for some venues to remain closed.

Consumers are faced with the challenge of managing increased entertainment expenses against the backdrop of high inflation, particularly with the price of commodities skyrocketing. In markets such as Belgium and Luxembourg, there has been an increase in US-style venues, providing multiple 'zones' allowing consumers to stay for the whole evening – from aperitifs through dinner to after-dinner drinks with live music – an offering that often comes at a premium.

Global On-trade TBA Volume Share (2019 vs 2022)

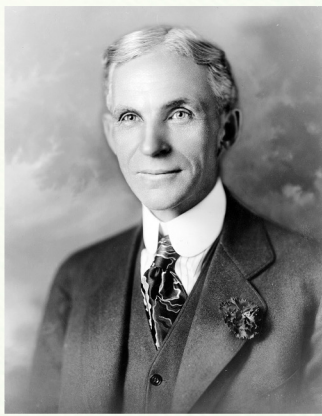


The on-trade is more important to the gin category others

	On-Premise	Off-Premise		On-Premise	Off-Premise	Index		
Category 1	2023	2023	Total	2023	2023			
Whisky	99,590.64	421,233.26	520,823.90	19.12%	80.88%	103%	99%	
Vodka	46,457.49	338,379.15	384,836.64	12.07%	87.93%	65%	108%	
Rum	32,950.70	129,921.50	162,872.20	20.23%	79.77%	109%	98%	
Gin and Genever	28,714.79	78,103.23	106,818.02	26.88%	73.12%	145%	90%	
Agave-Based Spirits	18,981.25	31,200.84	50,182.09	37.82%	62.18%	204%	76%	
	226,694.87	998,837.98	1,225,532.86	18.50%	81.50%			

USA





REPRISE



Chicago Sunday Tribune
THE WORLD'S GREATEST NEWSPAPER
OCTOBER 19, 1931
PRICE TEN CENTS

JURY CONVICTS CAPONE

omas A. Edison Dies in Sleep at 84

Kill Matt Kolb, Northwest Side Gambling czar

GANG MONARCH GUILTY ON 5 TAX FRAUD COUNTS

Faces Possibility of 17 Years in Cell.

INJUN SUMMER

DEATH PAINLESS FOR MAN WHO LIGHTED WORLD

Family at Bedside When End Came.

SUMMARY

THE TRIBUNE

Santa Ana Register
FINAL EDITION

BILLIONS LOST AS STOCKS CRASH

Pantages In Jail Awaits Sentence To State Prison

GUILTY THIS SENATE "FARM BLOC" STARTS

NOT AFTER BATTLE FOR HIGHER TARIFFS

HAY MARKET TO BE HELD IN THE CITY

RECEPTION TO BE HELD IN THE CITY

THE TRIBUNE

I WANT YOUR TAXES
Paying Taxes is Patriotic!

TOWARD LIQUOR CONTROL

Wege People



STATE LIQUOR DISTRIBUTION STYLES



THEY LIKE THEIR RULES...

STATE CONTROLLED (NABCA)

ALABAMA, IDAHO, IOWA,
MAINE,
MAINE, MICHIGAN,
MONTANA, NEW
HAMPSHIRE, NORTH
CAROLINA, OHIO, OREGON,
UTAH, PENNSYLVANIA,
VERMONT, VIRGINIA,
WEST VIRGINIA
& WYOMING

OPEN STATES

Alaska, Arizona, Arkansas,
California, Colorado,
Colorado, Connecticut,
Delaware, Florida,
Georgia, Hawaii,
Illinois, Indiana, Kansas,
Kentucky, Louisiana,
Maryland, Massachusetts,
Minnesota, Missouri,
Nebraska, Nevada, New
Jersey, New Mexico, New
York, North Dakota,
Tennessee, Texas,
Washington, Wisconsin

FRANCHISE STATES

Laws protect in-
state distributors

GOOD CAUSE
JUST CAUSE

60 DAYS BREACH
LAWS

ALCOHOL SHIPPING
LAWS ARE ALSO
HIGHLY COMPLICATED
AND VARY FROM STATE
TO STATE





CH-CH-CHANGES

700ml now approved size

- Bars traditionally use 1L for house pour brands
- Back bar bottles and retail size less impacted
- Competition keeping a close eye on each other
- Not all states
- Good news for smaller brands and the gin boom



↑↑
**THE
UNPACK**

EDITION 21.04

NEW STANDARDIZED GLOBAL BOTTLE SIZE: 700ML BOTTLES ARE ALLOWED FOR SPIRITS TO SELL IN THE USA.

by ByQuest

INSPIRATION

Just a few weeks ago, the TTB announced several changes for the permitted bottle sizes allowed in the United States. Most notably was the inclusion of the 700ml bottle. And no, for everyone reading this in the US, that isn't a typo. **In addition to the current US standard 750ml bottle, the 700ml format is now also an acceptable retail size.** While 750ml bottles are the standard for wine bottles across the world, outside of the United States the majority of distilled spirits are sold in the 700ml format. This change aligns the US with all other major distilling countries and will impact a producer's go-to-market strategy and long-term planning. There are a few key changes that we see coming from this addition, both for US and international distillers.

STATE OF THE UNION



They say its bleak out there, but...

GIN IS GROWING!

**gin is expected
to grow by 18%
through 2026** with
nearly all of this
growth coming from the
Premium+ area...

Conveniently where
Ford's Gin is
positioned...

US MARKET STATS***

9M CASES (2023)
1B REVENUE
16% Increase in SUPER
PREMIUM GIN
(up 16% to 700'000
cases)
VOLUME HAS SHRUNK
SINCE 2003
8.7% volume
2.4% by value

By category, GIN
was the only
spirit to
achieve an
**increase in On-
Premise** volume
sales over the 52-
week period IN
2023**

THE GIN BOOM MAY
NOT HAVE HAPPENED
IN THE USA BUT
EVERYONE IS STILL
OPTIMISTIC

*IWSR

**CGA by NIQ

***DISCUS

United States

Key Gin Cocktail Comparisons

Key Gin Cocktail Average Annual Search Popularity Over Time

United States

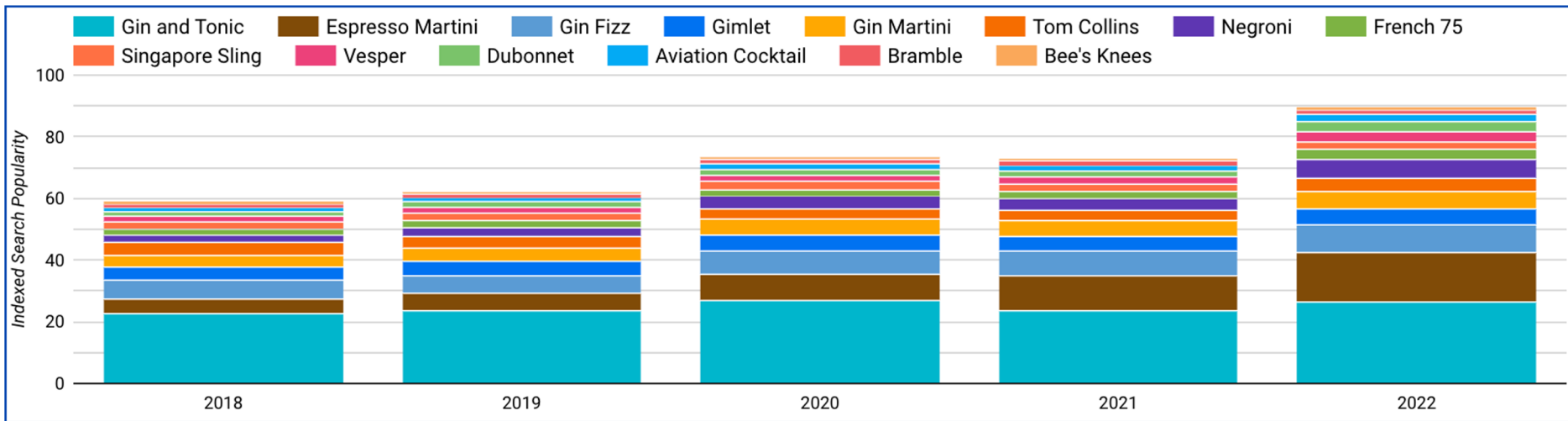


Chart illustrates average annual search popularity - indexed to a common high interest point.

An increase from year to year represents a stronger representative interest expressed through search behavior.

Gin martini is based on a specific term search. Other cocktails are based on Google Topics, which include multiple languages and spelling variations.

Overall key Gin Cocktail search has increased significant in recent years
- driven heavily by Espresso Martini, followed by Negroni.

Source: Google Trends

Date Range:

Jan 1 2018 - Dec 31 2022



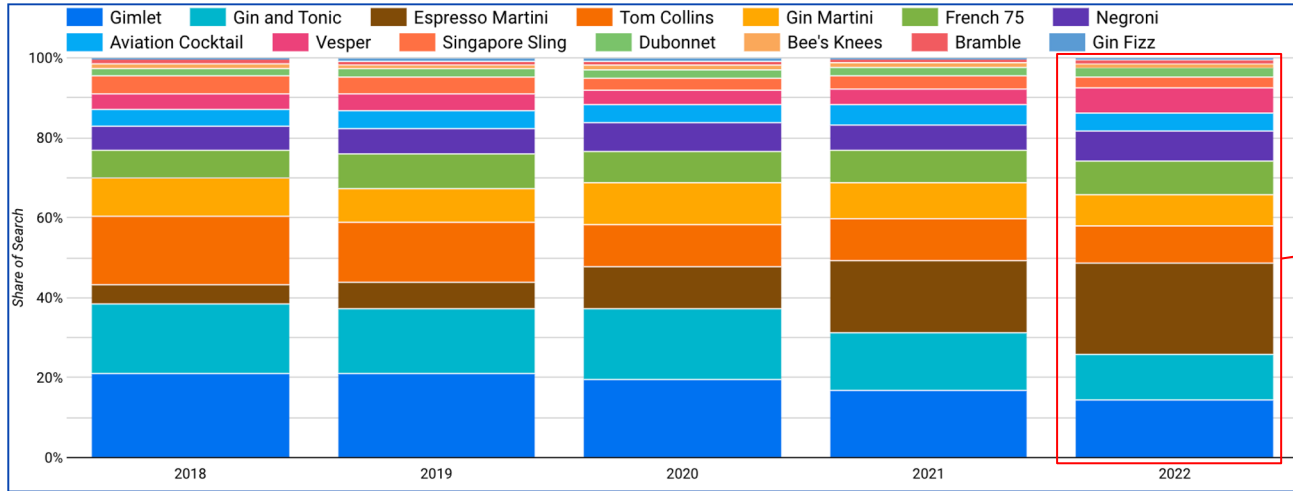
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Key Gin Cocktail Average Share of Search

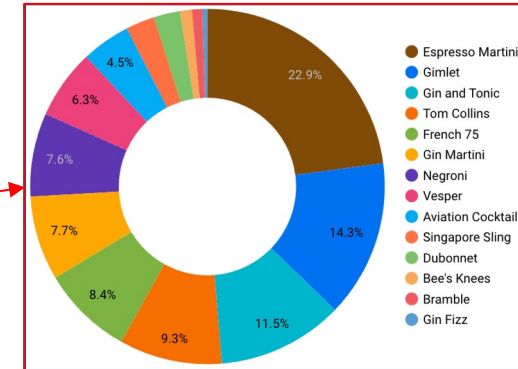


United States

Share of Search - Year Breakout



2022 Share of Search



41

Chart Illustrates Share of Search Over Time (as an average monthly share of indexed search popularity)

Espresso Martini has captured an increasing share of interest - showing a significant increase in the past two years.

Source: Google Trends
Date Range:
Jan 1 2018 - Dec 31 2022

Türkiye



IWSR Turkey Trend Report Summary (2023 Data)



Gin and Genever

Long-Term Drivers

Gin has benefitted both from increased tourism and interest among local consumers, as international trends catch on with travelling Turks and through social media. Consumers are gradually switching to gin from wine, as the former is trendy and the latter becoming more expensive.

Current-Year Changes

Gin continued to grow strongly in 2023 thanks to booming tourism and growing demand from local consumers, who are showing less interest in the raki category. Gin's popularity is expanding to whole-bottle serves on-trade, and is increasingly bought for home consumption.

Outlook

- + New gin brands continue to enter the market, with many supermarkets increasing their gin-stand visibility and presentation, which will attract a wider range of consumers.
- + Growing tourism and interest from locals will continue to be a main factor in driving future growth.
- Hyperinflation and economic uncertainty will pose a threat to the on-trade consumption of gin and tonics, as locals are becoming increasingly cautious with their spending.

Despite all challenges Turkiye is a an attractive emerging market



Spirits is the most dynamic sizable category and growing ahead of total alcohol category

IWSR Total Alcohol
5Y CAGR Growth Forecast

1%

IWSR Total Spirits
5Y CAGR Growth Forecast

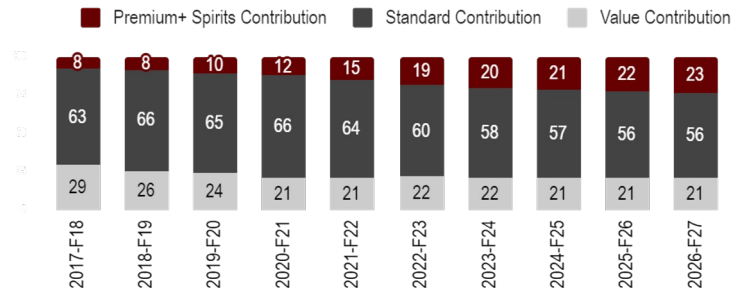
4%

Premium+ Tier is the engine of Spirits growth now and in future

Volume

Growth Rates, %	Super Premium+ Spirits	Premium+ Spirits	Standard+ Spirits	Standard Spirits	Value Spirits	Total Spirits
YoY	24%	43%	13%	6%	22%	15%
5Y CAGR 2017-22	28%	31%	11%	8%	3%	9%
5Y CAGR 2022-27fc	9%	9%	4%	2%	3%	4%
2022-F23, K9lcs	283	1924	8115	6191	2277	10393
2027-F28, K9lcs	432	2982	9793	6811	2634	12428

Turkiye - Volume

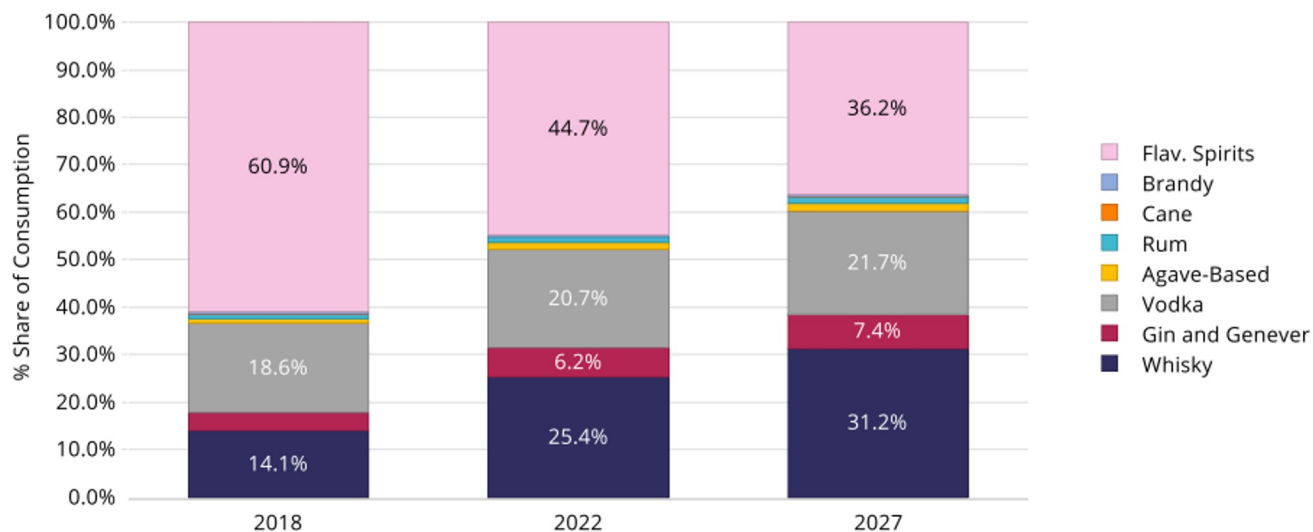


Gin has the 2nd highest growth rate in Türkiye



Spirits Summary

Spirits: Share By Category



Source: IWSR



Premium + Category growth rates are higher than stand



Gin and Genever

Turkey

Gin and Genever: Consumption By Price Band

000s 9-litre Cases

Category	2021	2022	Market Share 2022	CAGR 2021 to 2022	CAGR 2017 to 2022	CAGR 2022 to 2027
Gin and Genever	429.95	649.25	100.0%	51.0%	28.2%	7.3%
Gin	429.95	649.25	100.0%	51.0%	28.2%	7.3%
- Prestige-Plus	-	0.04	0.0%	-	-	20.1%
- Ultra-Premium	3.15	4.50	0.7%	42.9%	29.2%	11.5%
- Super-Premium	15.10	27.95	4.3%	85.1%	18.1%	20.7%
- Premium	7.88	14.91	2.3%	89.2%	30.1%	15.4%
- Standard	173.82	262.52	40.4%	51.0%	38.5%	7.5%
- Value	230.00	339.33	52.3%	47.5%	23.5%	5.1%
Genever						
- Value	-	-	-	-	-	-

Source: IWSR 2022 Report issued 25-05-2023. Value excl. Tax. Premium+ Spirits Price is 290+TLR. SP+ Spirits Price is 330+TLR





POPULATION +LDA:

55.3 MILLION



99% MUSLIM



EXCISE TAX INCREASE
TWICE PER YEAR



28% ALCOHOL
USERS



SALES PROHIBITED
AFTER HOURS
(10 P.M. – 6 A.M.)



TARIFFS IN PLACE
70%



TOTAL # OF
ALCOHOL USERS

15.5 MILLION

1.5lt

PER CAPITA
ALCOHOL USAGE



DARK MARKET
ANY ALCOHOL
RELATED
COMMUNICATION
IS **BANNED**

Dark market regulations

ALCOHOLIC
PRODUCTS CAN ONLY
BE PLACED IN
DESIGNATED AREAS IN
OUTLETS



- No Sale in Petrol Stations
- No Online Sale
- Alcoholic Products can not be sold after 10pm till 6am.
- Must have at least 100m between alcohol selling outlets and schools, mosques. Communication on shop signs banned.
- Any alcohol or consumption related logo or communication is banned.
- No VAP usage, only gift box.
- Only serving materials in on-trade can be branded



DARK MARKET - SOCIAL MEDIA CREATIVES

Cocktail images and the liquid can be shown in a cocktail glass but there musn't be **any bottle** in any creative asset.

Allowed



Not Allowed



DARK MARKET - SOCIAL MEDIA CREATIVES

Bottle image can't be shown in any form but if it is very blurry in the background it is fine to use

Allowed



Not Allowed



DARK MARKET - SOCIAL MEDIA CREATIVES

Brand name can't be used anywhere in the image

Allowed



Not Allowed



DARK MARKET - SOCIAL MEDIA CREATIVES

Lifestyle images **always work** in dark market and this is what **they need the most**

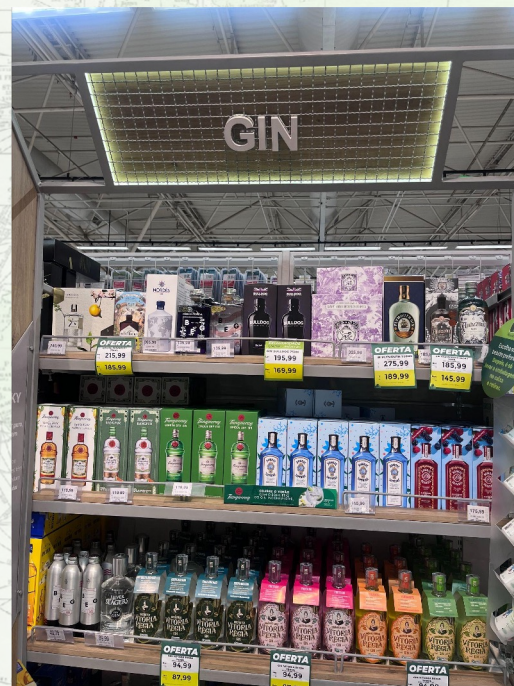
Allowed



Not Allowed





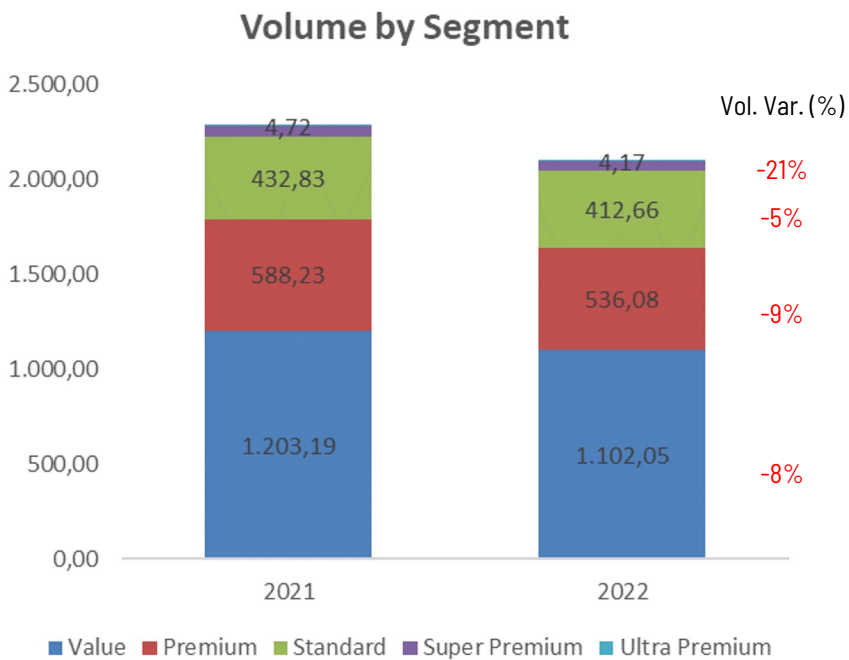
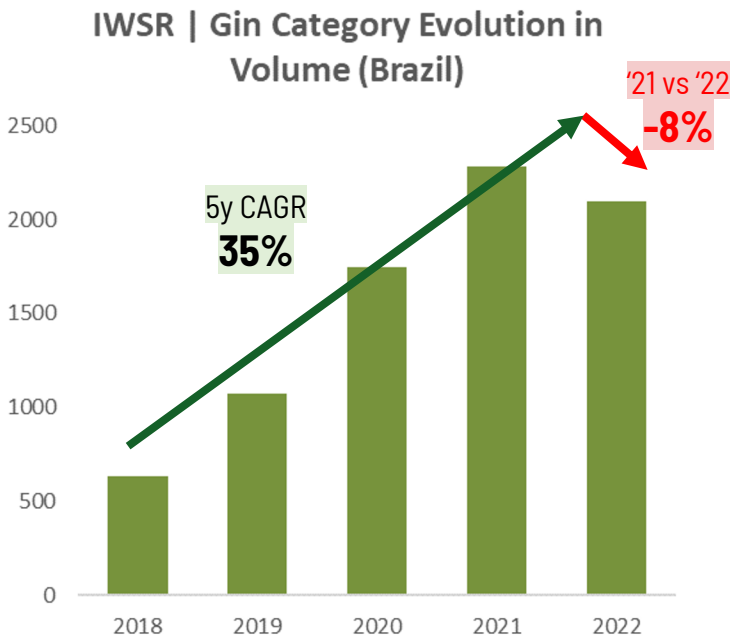


BRAZIL



GIN HAS LOST MOMENTUM IN BRAZIL IN 2022

AFTER A LONG GOOD RUN, THE GIN CATEGORY STARTED TO DECELERATE IN BRAZIL. NEW LOW-PRICE AND STANDARD BRANDS ENTERING THE MARKET, ALLIED WITH THE MACROECONOMIC SCENARIO, RESULTED IN A DECREASE OF CONSUMPTION AND A POSSIBLE TRADE-DOWN TREND WITHIN THE CATEGORY.



Source: IWSR 2022

IWSR Brazil Trend Report Summary (2023 Data)



Gin and Genever

Long-Term Drivers

Gin hasn't played a major role in Brazil in the past, with local brands holding sway over the market. However, the recent global surge in interest in gin and cocktail culture has transformed the category, turning it into a substantial and reliable contributor to Brazil's beverage industry.

Current-Year Changes

The gin market experienced a decline in volumes for the second consecutive year, affecting both national and imported brands. Flavoured gin managed to gain some traction and traditional gins in super-premium and higher segments saw a slight return to growth. This was the result of considerable effort by importers and distributors in the on-trade, with intensive training given to bartenders to help them premiumise their cocktail offers.

The on-trade is still gaining momentum, but the off-trade is facing challenges, except for budget-friendly local brands. The once-popular gin and tonic trend appears to have waned, with consumers allocating disposable incomes to more prestigious categories such as whisky instead.

Outlook

- + Flavoured gin remains the most promising option for the category to maintain volumes.
- + Gin producers are concerned about the drop in consumption and are exploring new products to revive consumption.

Brazil

Key Gin Cocktail Comparisons

Key Gin Cocktail Average Annual Search Popularity Over Time

Brazil

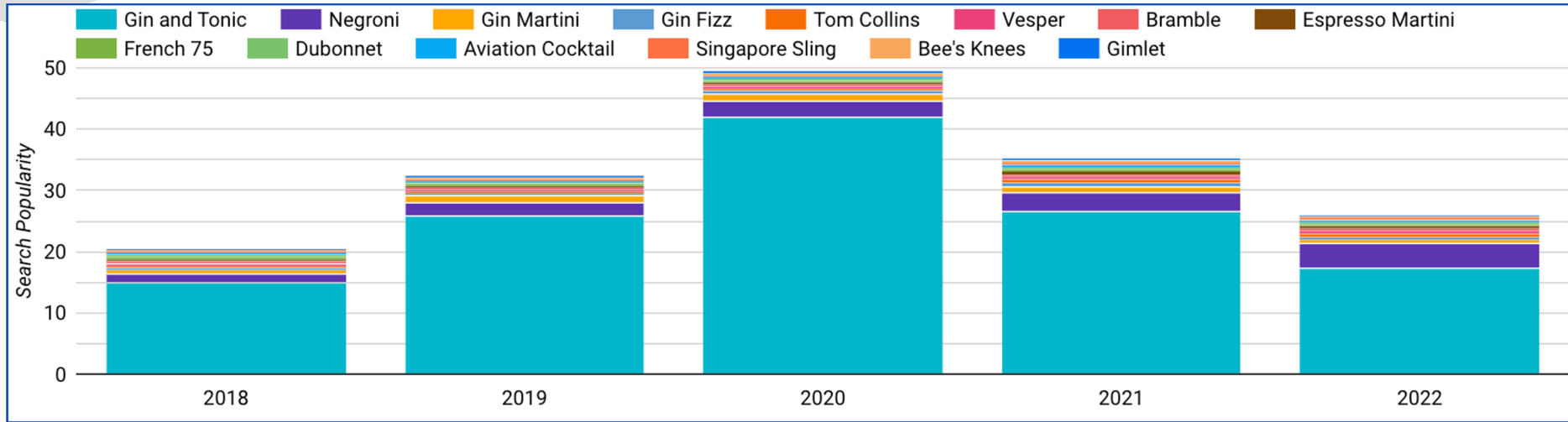


Chart illustrates average annual search popularity - indexed to a common high interest point.
An increase from year to year represents a stronger representative interest expressed through search behavior.

Brazil illustrates a pattern unlike most other markets analyzed, indicating recent interest in key gin cocktails has declined.

Source: Google Trends
Date Range:
Jan 1 2018 - Dec 31 2022

Key Gin Cocktail Average Share of Search

Brazil



Share of Search - Year Breakout

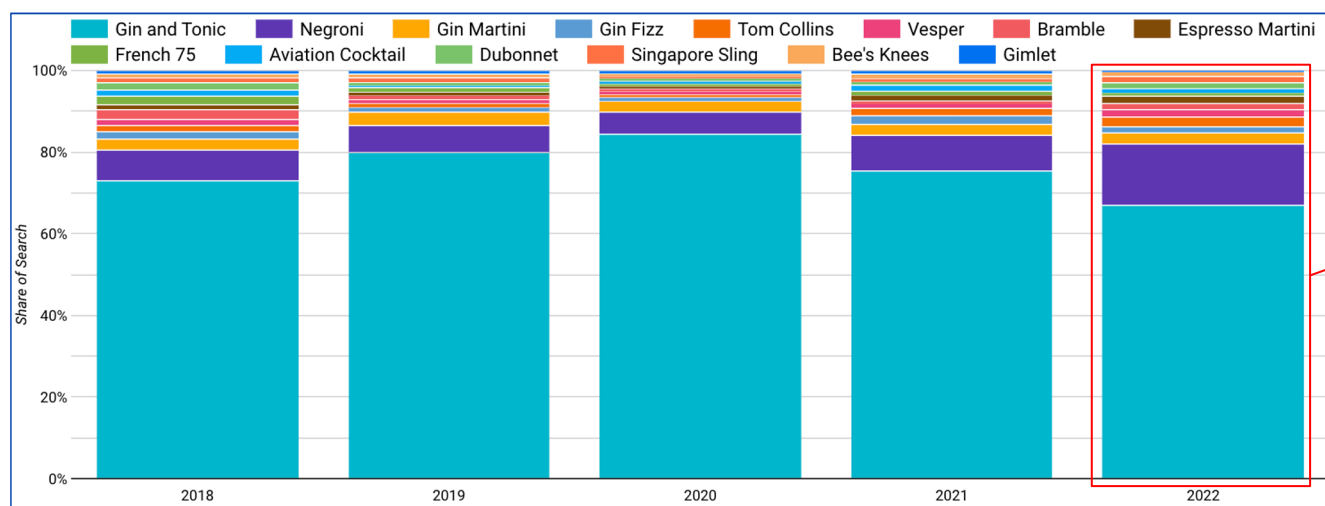
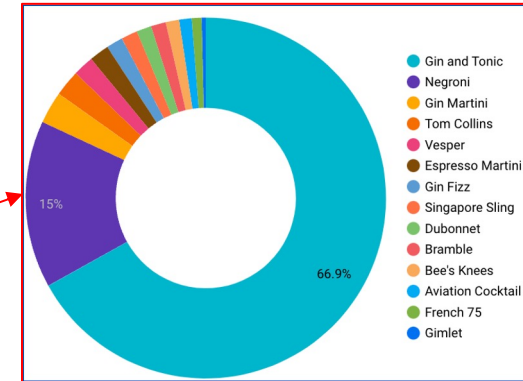


Chart Illustrates Share of Search Over Time (as an average monthly share of indexed search popularity)

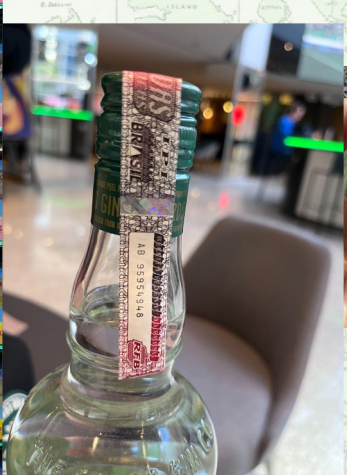
2022 Share of Search



60

Interest in Gin and Tonic has remained strong in recent years. However, the Negroni has begun to emerge in comparative popularity in Brazil.

Source: Google Trends
Date Range:
Jan 1 2018 - Dec 31 2022



BUILDING A SMALL GIN BRAND



BRAND BUILDING CHALLENGES

Small brands face unique challenges to grow:

- Largely unknown, low to no awareness
- Reliant on heavy category buyers with low loyalty & high competition
- Lack scale & efficiency to deliver volume quickly

To Grow a small brand you must expand penetration by increasing mental and physical availability to light category buyers and/or nurturing high volume accounts

Therefore you could:

- Build both mental and physical availability in sync via geographic focus
- Efficiently deliver activations that introduce consumers/customers to your gin reach while also
- Expand distribution: (selectively and effectively)

LAUNCH



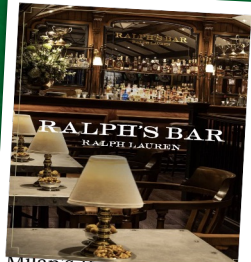
BRAND BUILDING MODEL - YEAR ONE

			
1 Engage Distributor Seed Brand	2 Launch events/PR Engage on-premise	3 Consumer tastings & Off-Premise	4 Introduce media
Distribution kick off - Brand seeding in cocktail establishments and fine dining - Seeding in speciality liquor stores and e-prem	Continue distribution drive Key industry and PR launch events Engage drinks journalists with launch story -	Continue distribution drive Continue focus on Brand Advocacy Select sponsorships at events and make sure excellence in drink execution	Continue distribution drive - Place new creative in select publications Focus on menu placements and shelf presence
<i>Bartender Education Series to introduce Gin to bartenders</i> <i>Focus on cocktail placements</i>	Seek brand presence at trade shows for the industry Utilise social media platforms Seek press opportunities	Bartender cocktail competitions In Store consumer drinks tastings Seek consumer sampling opportunities	<i>Start to execute events</i> <i>Advertise???".</i>

ACTIVATE ACTIVATE ACTIVATE



The Ned London Fords
Gin M&O Pop Up



Milan's Ralph Lauren Bar
menu placement &
bartender's brunch



Paris Whiskey Live



BCB Berlin x Kwant Partnership



Poland Better Bar Activation &
Simon Ford Market Visit



US&C Juniper Tree Tour



London's Seed Library
menu placement



Australia Maybe Sammy Cocktail
Festival Partnership



CFT4C Launches



Turkey 'Both Fords Gin
AND Gin Mare' Tastings

THE END



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Audience Q&A Session

① Start presenting to display the audience questions on this slide.

