



# JUST DRINKS PRESENTS: INNOVATION IN NON-ALCOHOLIC BEVERAGES CONFERENCE 2023

The Waldorf Hilton, London UK

19<sup>th</sup>- 20<sup>th</sup> September 2023

## Event Highlights:

- Coca-Cola Europacific Partners** - Soft drink aisle of the future and the role of innovation
- Boost Drinks** - What's hot in RTD: Convenience, energy, flavour, function
- Britvic** - case study: NPD and ensuring a successful launch
- Eckes-Granini** - Impact of the economic downturn on innovation in beverages
- Guinness, Diageo** - Looking at future dispense solutions
- Big Drop Brewing** - What does the future hold for craft producers
- HEINEKEN** - Trends and consumer insights within zero alcohol beverages
- TRIP** - CBD in on-trade and off-trade to create more tailored drinking experiences
- Roundtable discussion** - 'Mocktails' and their position - should they be mimics or drinks in their own right
- Karma Drinks** - Reaching different spaces in the soft drinks sector to maximise consumer reach
- Panel discussion** - Is functional fad or will it function forever?

# 12th Annual Innovation in Non-Alcoholic Beverages Conference

19<sup>th</sup> – 20<sup>th</sup> September 2023, The Waldorf Hilton London

## SPEAKERS

- Steve Gilsenan, Guinness Global Head of Quality, **Diageo**
- Sally Orland, Category Strategy Lead, **Coca-Cola Europacific Partners**
- Penny Willson, Head of Innovation, **Britvic**
- Karlijn van Ruiten, Global Innovation Manager, **HEINEKEN**
- Adrian Hipkiss, Marketing Director, **Boost Drinks**
- Kiran Jainani, Sr. International Insights & Innovation Manager, **Eckes-Granini**
- **Chair:** Mark Dempsey, Senior Consulting Director – Global, **GlobalData**
- Dominic Allport, Consulting Director – Custom Projects, **GlobalData**
- Holly Browne, Search and Insight Manager, Rest of World, **Distill Ventures**
- Mark Livings, Creator & Founder, **Lyre's**
- James Edmunds, Managing Director, **TRIP**
- Rob Fink, Founder, **Big Drop Brewing**
- Zoey Henderson, Founder & CEO, **The Fungtional Brew Company**
- Craig Hutchinson, Founder and CEO, **Mindful Brands**
- Maria Sehlström, Co-Founder, **Mindful brands**
- Jessamy Beeson-Jones, UK Country Manager, **Karma Drinks**
- Johnny Johnson, Founder, **UNLTD.**
- Julia Kessler, Co-Founder & CEO, **Nix & Kix**
- David Begg, Founder and Chief Exec, **The Real Drinks Co.**
- Laura Willoughby, Co-Founder, **Clubsoda**
- Rafael Rozenson, Founder, **Vieve**
- Mark Wong, Founder, **Impossibrew**
- Vicky Berry, Senior European business development manager, **Synergy Flavors**
- Jill Ngo, Sweet Goods Applications Manager, **Synergy Flavors**
- Phillip Cook, Industry Business Manager, Beverage, **Oterra**
- Emilio Saklambanakis, Regional Marketing Manager, EMEA, **Oterra**
- Sue Bancroft, Category Leader, Beverages, **Ingredion**
- Joana Maricato, Global Research Insights Manager, **Ingredion**
- Muserref Karadayi, Business Development Manager TASTE, **Ingredion**
- Andrea Launay, Market Analyst, **Rousselot**
- Lin Peterse, Beverages Category Development Manager, **Tate & Lyle**
- Marietta Sayegh, PhD, Nutrition Business Partner, **Tate & Lyle**
- Valerie Vandaele, Beverages Technical Category Manager, **Tate & Lyle**
- Olivier Kutz, Beverages Category Director Europe, **Tate & Lyle**
- Johanna Martin, Associate Director Consumer Disruption, **Cambridge Consultants**
- Magdalena Jablowska-Citko, Research Director, **Toluna/Harris Interactive**
- James Wilkinson, Enterprise Account Director, **Toluna**
- Gavin Sugden, Senior Client Director, **MetrixLab**

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# DAY ONE

Tuesday 19<sup>th</sup> September 2023

**08:00 Registration**

**08:50 Chair's opening remarks:**

**Mark Dempsey, Senior Consulting Director – Global, GlobalData**

**09:00 Readily expressed & ready to impress: Innovation in RTD for convenience & growth**

- What's hot and what's not in RTD: Convenience, energy, flavour, function
- Looking at innovation across the RTD range cross category to identify areas of opportunity
- Considering value in ingredients versus value in price in an age where wellness and recessions prevail the consumer mind to decide on which areas to innovate
- Creating offers that uniquely place brands to drive category expansion

**Adrian Hipkiss, Marketing Director, Boost Drinks**

**09:30 Innovation in Non-Alcoholic Beverages: How are the dynamics of today and concerns of tomorrow shaping NPD in beverages?**

*Innovation in the non-alcoholic beverage industry is response to evolving consumer preferences and tastes, health concerns and sustainability considerations. New Product Development (NPD) in this sector is heavily influenced by both current dynamics and future concerns. Drawing from our recent (2023) proprietary consumer insights study and beverage voice of customer research, we will explore some key themes we believe are shaping current NPD in non-alcoholic beverages.*

- Naturality and functionality – the continued demand for better for you beverages
- Water as the new soft drink of choice – how is NPD re-engaging consumers?
- The sweet spot between affordability and maintaining great taste

**Sue Bancroft, Category Leader, Beverages, Ingredion**

**Joana Maricato, Global Research Insights Manager, Ingredion**

**10:00 Story innovation: Buying into the brand**

- Differentiating with storytelling and branding to stand out in a saturated market
- Competing with the big players to carve out market share
- Creating an instinctive and memorable brand to gain worthy positioning in the industry
- Tapping into marketing and creativity to create a loyal consumer base

**Johnny Johnson, Founder, UNLTD.**

**10:30 Creating value in beverages – Capitalising on consumer needs across generations**

- Segmenting based on Nutritional benefits over consumers' lifespan
- Science & Solutions to create value
- The benefits of fibre to the beverage industry
- Formulation challenges: balancing positive nutrition, sugar reduction and taste

**Lin Peterse, Beverages Category Development Manager, Tate & Lyle**

**Marietta Sayegh, PhD, Nutrition Business Partner, Tate & Lyle**

**11:00 Networking - Coffee and Tea Sponsored by Sweegen**

<b>Stream A: Innovating through strategies &amp; growth</b>  <b>Chair: Mark Dempsey, Senior Consulting Director – Global, GlobalData</b>	<b>Stream B: No &amp; Low</b>  <b>Chair: Dominic Allport, Consulting Director – Custom Projects, GlobalData</b>
<p><b>11:30 Consumer Voice - Attitudes to ABV%, moderation, and the recent changes in UK Alcohol Duty</b></p> <ul style="list-style-type: none"> <li>• Do they care about ABV% when making decisions?</li> <li>• How many people actively moderate their drinking on a specific occasion?</li> <li>• How do they think alcohol strength impacts flavour?</li> <li>• And how open are they to innovation focused on low(er) and non alc. alternatives?</li> </ul> <p>Join this session for a debrief and analysis of the data from a survey run in July 2023, and have the opportunity to suggest follow up questions.  <b>Magdalena Jablkowska-Citko, Research Director, Toluna/Harris Interactive</b>  <b>James Wilkinson, Enterprise Account Director, Toluna</b>  <b>Gavin Sugden, Senior Client Director, MetrixLab</b></p>	<p><b>11:30 When craft &amp; corporate collide: How to survive &amp; thrive in the growing AF sector</b></p> <ul style="list-style-type: none"> <li>• Tactics and strategy for "smaller" players to stand out in a sector increasingly dominated by global drink companies</li> <li>• What does the future hold for craft producers in the AF sector?</li> </ul> <p><b>Rob Fink, Founder, Big Drop Brewing</b></p>
<p><b>12:00 Breaking barriers: Looking at future dispense solutions</b></p> <ul style="list-style-type: none"> <li>• Understanding the development process of dispense at home</li> <li>• Identifying the challenges with dispense</li> <li>• Using innovation in dispense technology for no &amp; low</li> <li>• The future of premiumisation at home</li> </ul> <p><b>Steve Gilsenan, Guinness Global Head of Quality, Diageo</b></p>	<p><b>12:00 The innovative edge in no &amp; low</b></p> <ul style="list-style-type: none"> <li>• Using innovation through technology and ingredients to stand out from the crowd</li> <li>• Identifying key indicators of success in early-stage beverage investments cross category</li> <li>• Understanding the key factors of commercialisation when it comes to marketing and conquering in a highly saturated market</li> </ul> <p><b>Mark Livings, Creator &amp; Founder, Lyre's</b></p>
<p><b>12:30 Spotlight: Being truly disruptive to address the drivers and trends in the beverage sector</b></p> <ul style="list-style-type: none"> <li>• The beverage sector is under increasing pressure which means companies need to be more ambitious, more radical and more disruptive</li> <li>• Making smart decisions around new technologies like AI, biometric sensing and advanced dispense can maintain market position and disrupt traditional markets</li> <li>• Be the disrupter, not the disrupted with examples from across consumer industry sectors</li> </ul>	<p><b>12:30 Normalising non-alcoholic beer by making moderation cool &amp; inspire consumers to drink responsibly</b></p> <ul style="list-style-type: none"> <li>• Taking inspiration from world's favourite zero alcohol beer brand: Heineken 0.0 to accelerate non-alcohol category growth</li> <li>• Understanding moderation drivers to drive further growth of non-alcohol brands</li> <li>• Trends and consumer insights within zero alcohol beverages</li> <li>• Reimagining the non-alcohol beer landscape - moving from niche to normal</li> </ul>

<p><b>Johanna Martin, Associate Director Consumer Disruption, Cambridge Consultants</b></p> <p><b>12:50 Lunch and networking</b></p>	<p><b>Karlijn van Ruiten, Global Innovation Manager, HEINEKEN</b></p> <p><b>13:00 Lunch and networking</b></p>
<p><b>14:00 Colours and emotions in beverages</b></p> <ul style="list-style-type: none"> <li>• Overview of natural colours and colouring foods in beverage</li> <li>• The importance of visual appeal in the digital environment</li> <li>• Colour psychology and mental health awareness</li> <li>• Optimal pigments and technologies in beverage</li> </ul> <p><b>Phillip Cook, Industry Business Manager, Beverage, Oterra</b>  <b>Emilio Saklambanakis, Regional Marketing Manager, EMEA, Oterra</b></p>	<p><b>14:00 Trends and innovation in non-alcoholic start-ups</b></p> <ul style="list-style-type: none"> <li>• Non-alc. is a booming space that is showing no signs of stopping</li> <li>• How non-alc. start-ups are standing out in the space</li> <li>• How brands are using innovation to create their liquid</li> </ul> <p><b>Holly Browne, Search and Insight Manager, Rest of World, Distill Ventures</b></p>
<p><b>14:30 From unknown to mainstream: CBD gains traction cross-category</b></p> <ul style="list-style-type: none"> <li>• Pushing a “niche” ingredient to wider categories to go mainstream</li> <li>• Experimenting with CBD in on-trade and off-trade to create more tailored drinking experiences</li> <li>• Innovating with CBD in the soft drinks category to create a loyal fan base with a wider audience</li> <li>• Innovating with drinks categories to bring CBD to greater market share and cater to growing wellness trends</li> </ul> <p><b>James Edmunds, Managing Director, TRIP</b></p>	<p><b>14:30 Panel discussion: Trends in no &amp; low: Functionally fabulous and fun and flavourful</b></p> <ul style="list-style-type: none"> <li>• Looking at the growing use of nootropics and adaptogens in no and low beverages to understand the demand for fun, intrigue, and function</li> <li>• Using new, unknown (e.g mushrooms) and more commonly known ingredients (coffee) to add an edge to the non alc offering and a benefit to the consumer</li> <li>• Changing consumer perception of price and value through the use of functional ingredients to bring premium offers to market</li> <li>• Staying innovative with RTD, Convenience and fun social experiences</li> <li>• Understanding the consumer’s desire for a credible beverage that opens up opportunity to mood altering concepts</li> </ul> <p><b><u>Panellists</u></b>  <b>Mark Livings, Creator &amp; Founder, Lyre's</b>  <b>Craig Hutchinson, Founder and CEO, Mindful Brands</b>  <b>Karlijn van Ruiten, Global Innovation Manager, HEINEKEN</b></p>

**15:00 Networking - Coffee and Tea Sponsored by Sweegen**

**15:30 The R&D innovation journey: Developing and launching successful NPD**

- Leveraging brand, tradition and innovation to thrive in a crowded market
- Keeping consumers at the heart of innovation, to unlock creativity and identify opportunity
- Partnering with R&D, different approaches to innovation from creating great NPD briefs to identifying success criteria
- Leveraging trends & foresight to creating a long-term science pipeline to support and develop the innovation portfolio

**Penny Willson, Head of Innovation, Britvic**

**16:00 Building resilience through innovation**

- Looking at the impact of the economic downturn is challenging for bringing new innovation to market
- The worldwide uncertainty and changing consumer behaviour compounds this difficulty
- How to best leverage existing capabilities and understanding of consumer attitudes to drive smarter innovation decisions

**Kiran Jainani, Senior International Innovation Insights Manager, Eckes-Granini**

**16:30 Panel discussion: Killing Innovation: The dark side of the green agenda**

- The increasing importance of packaging in the beverage industry
- New DRS schemes coming up in the UK, taxes on unsustainable materials and the push for lower carbon footprint
- How the sustainability agenda is pushing innovation
- How are smaller brands being affected
- What is the knock-on effect sustainability regulations have in terms of innovation in flavours, portfolio, and product design

**Panellists**

**Jessamy Beeson-Jones, UK Country Manager, Karma Drinks**

**Johnny Johnson, Founder, UNLTD.**

**Julia Kessler, Co-Founder & CEO, Nix & Kix**

**17:00 Drinks reception**

**18:00 End of day one**

# DAY TWO

Wednesday 20<sup>th</sup> September 2023

**08:00 Registration**

**08:50 Chair's opening remarks**

**Mark Dempsey, Senior Consulting Director – Global, GlobalData**

**09:00 Speaker hosted roundtables**

Interactive roundtable sessions offer a unique opportunity to come together with your peers to share best practice and develop solutions to critical challenges facing the industry as a whole. Hosted by industry experts and each focused on a single issue, roundtables are an exciting, interactive way to build your personal network and learn from the experience and expertise of others.

Each roundtable session lasts for 45 minutes, and delegates may attend up to 2 roundtables.

## **Roundtable 1: To mock or not to mock!**

- A discussion focusing on 'mocktails' and their position – should they be mimics or drinks in their own right
- Reviewing what consumers really think about the word 'mocktail' and what they would like to see
- Exploring the on-trade and the difference in language and communication on menus
- Exploring the history and evolution of the mocktails, including a tasting of the 'first' ever mocktail...but with a Synergy twist
- A discussion on how to elevate mocktails with layered flavours and adding interest with trending flavours

**Vicky Berry, Senior European business development manager, Synergy Flavors**

**Jill Ngo, Sweet good applications manager, Synergy Flavors**

## **Roundtable 2: Brand extensions - friend or foe to the growth of alcohol-free**

Sharing our latest research - Drinks For Everyone - we will open a discussion about the changing market, consumer behaviour and the impact on policy and regulation. Is there a way that all parts of the alcohol-free sector can work together to encourage growth?

**Laura Willoughby, Co-Founder, Clubsoda**

## **Roundtable 3: TASTE-Engineering: The power of modulation**

From juice to plant-based beverages, this session is designed to showcase how we approach "taste" and the power of our modulation capabilities.

**Muserref Karadayi, Business Development Manager TASTE, Ingredion**



## **Roundtable 4: Does nutrition - beyond sugar and calorie reduction - have a role to play in mainstream beverages?**

- Opportunities and challenges faced in creating the future soft drinks aisle
- Impact of inflationary pressures on NPD strategies
- Overcoming formulation challenges: balancing positive nutrition, sugar reduction and taste
- A case study on flavoured water

**Olivier Kutz, Beverages Category Director Europe, Tate & Lyle**

**Lin Peterse, Beverages Category Development Manager, Tate & Lyle**

**Marietta Sayegh, PhD, Nutrition Business Partner, Tate & Lyle**

**Valerie Vandaele, Beverages Technical Category Manager, Tate & Lyle**

**10:30 Networking - Coffee and Tea Sponsored by Sweegen**

**11:00 Soft drink aisle of the future and the role of innovation**

- Evolution of the soft drinks aisle to cater to changing consumer expectations
- Engaging shoppers in innovation at fixture and whilst shopping online
- How will sustainability drive soft drinks innovation of tomorrow

**Sally Orland, Category Strategy Lead, Coca-Cola Europacific Partners**

**11:30 Collagen Peptides: A key ingredient for the rising functional beverage industry**

- The functional beverage category is growing as consumers are looking for convenient ways to support their lifestyle and wellness goals
- Discover how collagen's versatility and wide range of benefits makes it the perfect hero ingredient for functional beverage formulations

**Andrea Launay, Market Analyst, Rousselot**

**12:00 New consumer cravings: Shaking up the non-alcoholic beverages category**

- Looking at increasing consumer demand across non-alcoholic beverage categories to understand new and declining trends
- Using data to determine where to focus innovation in the non-alcoholic drinks category
- Understanding global consumer demands to create beverages that tap into trending issues
- Identifying consumer priorities to decide on areas for innovation in the drinks sector

**Mark Dempsey, Senior Consulting Director – Global, GlobalData**

**12:30 Lunch and networking**

**13:30 Clean mixing, quick serving, one size doesn't fit all: Innovation in drinks outside of flavour profiles**

- Innovating in traditional flavour profiles, by sourcing ethical, organic and local ingredients for a more premium (and tasty!) serve
- Reaching different spaces in the soft drinks sector to maximise consumer reach
- Focussing on formats instead of flavour to explore innovative ways to stand out in a saturated market
- Playing with format and delivery to catering to a variety drinking occasions wanted by today's consumer
- Taking inspiration from nostalgic brands and flavour profiles to clear up headspace for new areas of innovation
- Giving more choice to consumers outside of the flavour profile to tap into consumer priorities through format

**Jessamy Beeson-Jones, UK Country Manager, Karma Drinks**

#### **14:00 Panel discussion: How to get the innovative edge in a market of vast choice**

- Where do you find real inspiration for creating new innovative beverages?
- In an era of health and eco-friendly awareness, should innovation stay closer to home to reduce product footprint and support local produce?
- Where is the focus in innovation in 2023 in the beverage industry?
- With no and low and mixers, the lines can get blurry when it comes to category and audience, what are the key considerations when it comes to creating a beverage that may have multiple uses or fit several drinking occasions?
- How important is the role of the soft drinks industry in influencing the no and low market and vice versa?
- What should we consider as trailblazing when it comes to innovation in beverages?

##### **Panellists**

**Sally Orland, Category Strategy Lead, Coca-Cola Europacific Partners**

**Mark Livings, Creator & Founder, Lyre's**

**Rafael Rozenson, Founder, Vieve**

**David Begg, Founder and Chief Exec, The Real Drinks Co.**

#### **14:30 What in the world is happening with flavour?**

- Understanding consumer association with flavour, function and aesthetics to provoke the emotional state and increase purchase rates
- Knowing the consumer avatar to create a portfolio that appeals and converts to high sales
- Monitoring flavour and functionality trends to generate a successful NPD plan
- Helping consumers in their quest for vitality through vitamin hits to increase the psychological and physical feel-good
- Applying buyer psychology to innovation plans to impulse brand awareness and revenue

**Julia Kessler, Co-Founder & CEO, Nix & Kix**

#### **15:00 Networking - Coffee and Tea Sponsored by Sweegen**

**Apple Prize Draw**

#### **15:30 Panel discussion: Is functional fad or will it function forever?**

- Understanding the drives for more functional drinks 3 years post pandemic. Is functional here to stay?
- Do consumers really know what vitamin hits and functional flavours they are taking and what makes them purchase a functional beverage?
- How niche is functional or is it leaking into mass market consumption? What is driving its growth and how can brands continue to ensure that brands care about what is in a drink?
- Looking at the beverage industry and all its variety. How can you make a drink for a mass market when innovation seems to occur in subcategories?
- Which categories are leading the way with functional beverages / which categories are striving through functional?
- Which ingredients are trailblazing the future of the beverage industry?
- How can we give retailers the confidence of stocking new products with “curious” ingredients and tackle the hesitancy to provide newer functional products to consumers?
- What can we expect of consumer spending during a recession on “non-staple” products or do functional beverages have a more significant role in a consumer’s daily life?
- What do we need to understand about the drinking occasion for healthy drinks vs the adult occasion with functional drinking experience?

##### **Panellists**

**Kiran Jainani, Senior International Innovation Insights Manager, Eckes-Granini Group**

**Zoey Henderson, Founder & CEO, The Functional Brew Company**

**Maria Sehlström, Co-Founder, Mindful Brands**

**Julia Kessler, Co-Founder & CEO, Nix & Kix**  
**Mark Wong, Founder, Impossibrew**  
**Rafael Rozenson, Founder, Vieve**

**16:15** Chairman's closing remarks

**16:20** End of conference