



Just Drinks Presents: The 25th Annual International Beer Strategies Conference 2023

Melia Berlin, Germany

10 – 12 October, 2023

Luitpold Prinz von Bayern, Chairman of the Bavarian Family
Entrepreneurs / Managing Partner of König Ludwig International
Adrian Klie, CEO Germany, Brewdog
Dave McCarthy, Vice President, White Claw, Mark Anthony Brands
International
Alison Falconer, Global Consumer Planning Director, Guinness and
Beer, Diageo
Beata Neubauer, Vice President Strategic Marketing, König Ludwig
International GmbH & Co.KG
Martina Schmidt, Group Innovation Director, Asahi Europe &
International
Zuzana Heleyová, Group Strategy Planning and Insights Director,
Asahi Europe & International
Gareth Morgan, Global Marketing Manager, Peroni Nastro Azzurro
Partnerships
Christopher Granville, Managing Director, Global Political & Policy
Research, GlobalData.TS Lombard
Joana Queirós, Head of Innovation, Super Bock
Bruno Lopes, Head of Marketing, Super Bock
Erich Jaquemar, Key Account Manager for International Clients,
Vetropack
Evan Williams, Chief Commercial Officer, Vetropack

Carlos de la Barra, Head Brewer & Wine Maker, Beer52
Erik Sahlin - Owner and Director of Operations - Sahlins Brygghus
Rob Fink – Founder - Big Drop Brewing Co
Katy Lee, CEO, Sundays Beverage AG
Barbara Semlitsch, Head of Market Intelligence, Warsteiner
Brauerei
Gareth Jones, Operations & Commercial Director, Glass Technology
Services Ltd
Daniel Capon, Food & Drink Lead, Glass Technology Services Ltd
Maria Lindmark, Revos Business Director, Alfa Laval
Mårten Lyth, Chief Communications Officer, Spendrups
Richard Bengtsson, Brewmaster and Head of Product Delevopment,
Spendrups
Johnny Johnson – Founder – UNLTD.
John Gyngell, Founder, North Brewing
Greg Klingaman, VP, Strategy & Field Operations EMEA, Any Road
Alexander Sneen, Vice President Marketing, Sinebrychoff
Luca La Francesca, Product Manager, Vinhood
Alessandro Lualdi, Sensory R&D Manager, Vinhood
Gauthier de Biolley, Founder & Managing Partner, Eiger Ventures
Dirk Grafe, Strategic Sales BRAUMAT, Siemens
Chair: Kevin Baker, Head of Global Beer & Cider Research,
GlobalData
Chair: Mark Dempsey, Senior Consulting Director, GlobalData
Chair: Dean Best, Managing Editor, Just Drinks and Just Food
Chair: John Humphrey, Consulting Director Alcoholic Beverages,
GlobalData

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BEER TOUR with BrewDog Brewery, Berlin

10th OCTOBER 2023

1st Tour 2pm

2nd Tour 4pm



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International Beer Strategies Conference Day 1 Wednesday 11 th October 2023	
08:00	Registration and refreshments
08:45	Chair's opening remarks Kevin Baker, Head of Global Beer & Cider Research, GlobalData
09:00	Keynote Making Beer Future Fit for Smaller & Midsized Beer Brands <ul style="list-style-type: none"> • Family enterprise – the German success model • Breweries in the hands by SME vs. global players • Identifying the differences of their • ethical, social and economic responsibilities • Exploring the importance of brands in family steered enterprises • Challenges, risks and advantages Luitpold Prinz von Bayern, Chairman of the Bavarian Family Entrepreneurs / Managing Partner of König Ludwig International
09:30	Reserved for Sponsor
10:00	The Birth of the 4th Category: The Rise of Flavours <ul style="list-style-type: none"> • Understanding the growing demands for RTD adult beverages to cash in on newly appearing categories • Identifying the factors behind drinking trends that spread from the US globally and the role that hard seltzer plays • Exploring developments in flavour innovation and RTD presentation to tap into the convenient drinking occasion Dave McCarthy, Vice President, White Claw, Mark Anthony Brands International
10:30	Beer Unleashed: Embracing Consumer Trends and Shaping Future Consumption

	<ul style="list-style-type: none"> • Navigating consumer behaviours and trends in the ever-Changing beer industry landscape to understand where to focus and pivot • Unveiling the diverse palates across the globe to understand consumer demands across generations and borders • Harnessing consumer attitudes as a compass for uncovering untapped growth opportunities and leveraging consumer insights to drive product innovation, marketing strategies, and expand market reach • Navigating consumer reactions to price increases and inflation <p>Kevin Baker, Head of Global Beer & Cider Research, GlobalData</p>	
11:00	Morning refreshments and networking	
	<p>Stream A Marketing & Growth Chaired by Kevin Baker, Head of Global Beer & Cider Research, GlobalData</p>	<p>Stream B Emerging Trends in No & Low Chaired by Mark Dempsey, Senior Consulting Director, GlobalData</p>
11:30	<p>Beer & Society 2030 Progression:</p> <ul style="list-style-type: none"> • Understanding Diageo’s commitments on Sustainability, Positive Drinking and Equality to help reshape our beer business and make it fit for the future. • Spotting unique opportunities for market growth to tap into prosperous trends • Creating unique beer brands for the future <p>Alison Falconer, Global Consumer Planning Director, Guinness and Beer, Diageo</p>	<p>How Low and No Alcohol Beers meet the needs of health-conscious consumers</p> <ul style="list-style-type: none"> • How no and low can support consumer needs for moderation and healthy lifestyle to create a portfolio around well-being • How the perception of non-alcoholic beers has changed over the last 10 years and identifying the drivers (case studies from CEE markets) • Exploring premiumization through no and low alcohol beers to understand pricing and positioning <p>Martina Schmidt, Group Innovation Director, Asahi Europe & International Zuzana Heleyová, Group Strategy Planning and Insights Director, Asahi Europe & International</p>
12:00	<p>Hear about the sustainability credentials of glass packaging and the opportunities to further improvement</p> <ul style="list-style-type: none"> • Learn about the hot topics relating to sustainable design, recycled content, recyclability, and rightweighting • What are the future technology options that can be utilised to meet net zero targets. <p>Gareth Jones, Operations & Commercial Director, Glass Technology Services Ltd Daniel Capon, Food & Drink Lead, Glass Technology Services Ltd</p>	<p>A better journey for your beer – Reduce costs and CO2 emissions with beer concentrate</p> <ul style="list-style-type: none"> • Remove pure water in beer before transportation, cut fluctuating transport cost and emissions by up to 80% • Profitably expand new product development and market reach through cost-effective transport of concentrated beer • Diminish investment barrier in non-alcoholic beer production through

		<p>cost-effective global bulk transport from an existing production site</p> <p>Maria Lindmark, Revos Business Director, Alfa Laval</p>
12:30	<p>Super Bock Sky: the first refreshing light Beer in Portugal</p> <ul style="list-style-type: none"> • How Super Bock adapts Portfolio Strategy to consumer needs; • How Innovation process helped to speed up this launched; • Feedback and Learnings for the future <p>Bruno Lopes, Head of Marketing, Super Bock Joana Queirós, Head of Innovation, Super Bock</p>	<p>PANEL: Raising the Bar: The Next Frontier for No and Low Alcohol Beer</p> <ul style="list-style-type: none"> • The no and low boom is giving way to more adult-drinking experiences, how does this affect the beer drinking adult experience? • How is the growth in no and low draft expected to affect the beer industry as a whole and what can be done to share the market more effectively? • What are the future predictions for 0.0% beer and how do you expect the split between non-alcoholic only brands and the top players expanding their market to play out? • What’s next for product innovation and technology implementation within the low and no alcohol segment? <p>Chair: Dean Best, Managing Editor, Just Drinks and Just Food Rob Fink, Big Drop Brewing Martina Schmidt, Group Innovation Director, Asahi Europe & International</p>
13:00	Networking lunch	
	<p><u>Stream A</u> Marketing and Growth Chaired by Kevin Baker, Head of Global Beer & Cider Research, GlobalData</p>	<p><u>Stream B</u> Emerging Markets & Trends Chaired by Mark Dempsey, Senior Consulting Director, GlobalData</p>
14:00	<p>The ‘New Macro Supercycle’: What it means for the beer industry</p> <ul style="list-style-type: none"> • A rare turning point for the world economy is nigh • A higher-pressure economy will mean stronger consumer purchasing power • But the drivers of this hotter demand – demography, climate, geopolitics – will also squeeze margins amid higher and more volatile inflation 	<p>The Canvas & The Can: The Dynamic Shifts in Beer Consumption</p> <ul style="list-style-type: none"> • Looking at how beer consumption has shifted to understand changes and adaptations that need to be made in beer • Considering the shifts in consumer habits to understand the newly seen decisions being made by breweries

	<ul style="list-style-type: none"> • Key mitigators are concentration in local markets and smart product/brand portfolio balance <p>Christopher Granville, Managing Director, Global Political & Policy Research, GlobalData.TS Lombard</p>	<ul style="list-style-type: none"> • Analysing the success and challenges of the brew pub model to adapt to new consumer behaviours • Spotting trends across Europe when it comes to new ways to reach the beer enthusiast • Identifying ways beer is staying relevant through packaging and messaging to keep the consumer close to the brand <p>Carlos de la Barra, Head Brewer & Wine Maker, Beer52 Henrik Kihlberg, CEO, Nils Oscar</p>
<p>14:30 Spotlight session</p>	<p>Sustainable Brewing Practices: The Rise of the Gypsy Brewery</p> <ul style="list-style-type: none"> • Discussing the importance of sustainability with each brand to identify the areas of green focus to prioritise • Exploring innovative approaches to reducing water usage and carbon emissions • Sharing best practices for sourcing local and sustainable ingredients for a greener brewing industry <p>Reserved for Bar. On</p>	<p>Brewing for Wellness: Exploring Functional Beers as the Next Frontier for Health-Conscious Consumers</p> <ul style="list-style-type: none"> • Exploring the intersection of beer and wellness to cater to the growing demand for healthier beverage options • Understanding the changing mindset of the wellness movement to understand how functional meets the health-conscious consumer’s desires and needs • Highlighting the variety of functional ingredients used in brewing to understand how to showcase their potential benefits • Enhancing the beer drinking experience with functional ingredients to provide consumers with added value beverages • Analysing the future of functional in beer to understand the potential challenges and opportunities that lay ahead <p>Reserved for Proexes</p>
<p>14:45</p>	<p>Brewing Success: Navigating International Markets and Building a Strong Brand Identity</p> <ul style="list-style-type: none"> • Exploring strategies to expand into international markets • Identifying the importance of developing a strong brand DNA that aligns with the brewery’s values, visions and target market • Exploring the role of brand messaging and values in capturing new market 	<p>Brewing the future: Navigating the Non-Alcoholic Revolution in the Beer Industry</p> <ul style="list-style-type: none"> • Exploring the current state and projected growth of no and low within the beer industry to predict consumer behaviour of the future • Drawing insights from the tobacco industry’s shift towards reduced-risk products to understand the direction of alcohol

	<p>share and reconnecting with lost consumers</p> <ul style="list-style-type: none"> Aligning brand values with the evolving consumer mindset <p>Beata Neubauer – Vice President Strategic Marketing - KÖNIG LUDWIG INTERNATIONAL GmbH & Co.KG</p>	<ul style="list-style-type: none"> Examining parallels between tobacco and alcohol industries and how the tobacco industry’s response to changing consumer preferences and regulations can inform strategies for the beer category Preparing for the rising demand of no and low beer options to be at the forefront of the zero-movement Embracing change in consumer behaviours to develop products that satisfy the new-age adult drinker <p>Session available</p>
15:15	Afternoon refreshments and networking	
15:45	<p>PANEL: Flavour & Flexibility From Craft Beer to Crafting a Diverse Portfolio</p> <ul style="list-style-type: none"> Analysing the impact of the shifting beer and beverage market across Europe to identify pockets of opportunity Considering vertical integration of different beverage types to broaden your beer portfolio and overcome the challenges in craft Pivoting from craft beer to new SKUs to break through the market and the glass ceiling Understanding the “when” and the “why” to increase new product development to ensure budget and goals align Exploring flavours to develop a diverse beer portfolio that appeals to different markets Transitioning into RTDs, distilling and other beverage options to overcome the challenges in craft beer <p>Erik Sahlin - Owner and Director of Operations, Sahlins Brygghus Barry Butterfield, Owner, Sandford Orchards John Gyngell, Founder, North Brewing</p>	
16:15	<p>Learn To Leverage Beer Flavour For 1:1 Consumer Engagement</p> <ul style="list-style-type: none"> Reframing the relevance of taste variety for consumers Highlighting the 2 golden factors to make taste variety the true game changer Exploring the applications of innovative approaches, to hyper-personalize and boost current marketing and commercial strategies Watching a true case study come alive <p>Luca La Francesca, Product Manager, Vinhood Alessandro Lualdi, Sensory R&D Manager, Vinhood</p>	
16:45	<p>PANEL: Cracking the Global Code: What Really Makes a Beer Brand Global?</p> <ul style="list-style-type: none"> Is it a One-Size-Fits-All? What are the essential decisions needed to successfully adapt to consumer behaviours and trends on a market-by-market basis? Can we identify what the beer drinkers of today want when it comes to beer, on a global scale and how can we use the data to simplify plans to expand in beer? How do we bring different cultures together through beer and what are the key indicators of “what’s next” in beer to crack the global code? What does it really mean to beer brands to be a brand of the world and what does it take to get there? 	

	<ul style="list-style-type: none"> • How do you translate beer legacy across continents where beer is made locally to reduce production costs? • Does success lie in the positioning, marketing or differentiation factor? • What are the challenges when it comes to taking a beer to the global stage? <p>Chair: John Humphrey, Consulting Director Alcoholic Beverages, GlobalData Dave McCarthy, Vice President, White Claw, Mark Anthony Brands International Katy Lee, CEO, Sundays Beverage AG Barbara Semlitsch, Head of Market Intelligence, Warsteiner Brauerei Gauthier de Biolley, Founder & Managing Partner, Eiger Ventures</p>
17:30	Drinks Reception
18:30	After Party Celebrate 25 years of the International Beer Strategies Conference by joining us at Die Berliner Republik for drinks, refreshments and an evening of networking 

International Beer Strategies Conference Day 2 Thursday 12 th October 2023	
08:30	Registration and refreshments
08:50	Chair's opening remarks
09:00	Time to act – five thesis on how climate change, AI, eroding political stability, new work & social development will re-shape the beer industry! <ul style="list-style-type: none"> • 5 mega trends and 5 thesis how they will affect our industry • The key skills needed to master the new playing field • Opportunities to grab fast, making beer the spearhead of change • Why communication is the mega power to win <p>Adrian Klie, CEO Germany, Brewdog</p>
09:30	From Brewery Tours to Brand-in-Hand Activations: How to Optimise the Power of in-Real-Life Experiences <ul style="list-style-type: none"> • Designing brand experiences that create behavioural change and influence future purchases • Leveraging consumer insights to amplify what's working and act on what's not • Harnessing 1st party consumer data for long-term brand growth • Measuring success: from one-dimensional to three-dimensional KPIs <p>Greg Klingaman, VP, Strategy & Field Operations EMEA, Any Road</p>
10:00	<u>Interactive roundtable discussions</u> Join us for a morning of interactive discussion and debate. This is your opportunity to select your area of interest and engage with fellow experts in the area. Topics for discussion: Topic 1 – Is No & Low set to dominate the beer industry? <i>Reserved for Sponsor</i> Topic 2 – How is beer changing in terms of trade in 2023 and beyond? <i>Reserved for Sponsor</i> Topic 3 – Flavours and Function: Added value, added fun beer? <i>Reserved for Sponsor</i>
11:45	Morning refreshments and networking
	Stream A
	Stream B

	<p>NPD & Innovation in Beer Chaired by Kevin Baker, Head of Global Beer & Cider Research, GlobalData</p>	<p>Strategy through Digital & Trade Chaired by Mark Dempsey, Senior Consulting Director, GlobalData</p>
12:15	<p>Brewing for future generations How Spendrups are turning waste and residual management issues into valuable resources.</p> <ul style="list-style-type: none"> For decades Spendrups Bryggeri, a mid-size family brewery far up in the north, tried to save money and resources to make ends meet. But what started out as a way of lowering costs has become a company-wide focus for sustainable innovation and a hub for cross-industry collaboration. All kinds of residual and side streams from the brewing operations are of interest and have potential value – if only you have the stamina or find the right partner. We will be sharing examples on how to put your spent grain and other residual streams to good use for the environment and the business. Along with failures, follies - and some success. <p>Mårten Lyth, Chief Communications Officer, Spendrups Richard Bengtsson, Brewmaster and Head of Product Delevopment, Spendrups</p>	<p>Unleashing the Power: Global Partnerships and the Beer-Sponsorship F1 Case Study</p> <ul style="list-style-type: none"> Leveraging global partnerships to focus on building deeper connections with consumers through sport Enhancing the beer drinking occasion by creating memorable experiences through experiential marketing Diving into the successful partnership between beverage brands and F1 to analyse brand visibility and reach Understanding the benefits of sport in Societal “downturns” to engage and uplift communities and drive positive brand sentiment Discussing emerging trends in global partnerships for beer to identify opportunity to increase consumer interaction and brand storytelling <p>Gareth Morgan, Global Marketing Manager, Peroni Nastro Azzurro Partnerships</p>
12:45 spotlight	<p>Bringing innovation into action: The future of flexible process control in brewing</p> <ul style="list-style-type: none"> This case study will present techniques for successfully addressing the digital transformation, the increasing complexity of operations and the growing need of transparency in brewing. Standardized systems, modular automation concepts and the use of artificial intelligence will help to manage operational complexity and change the way we produce in future. <p>Dirk Grafe, Strategic Sales BRAUMAT, Siemens</p>	<p>Competitive growth strategies in beer: Diversifying distribution and sales</p> <ul style="list-style-type: none"> Using the shift to digital and direct to consumer in the pandemic to amplify market growth Presenting growth strategies from new product launches, partnerships and collaborations to augment consumer bases and enhance market reach Developing strategies to ensure differentiation and future readability <p>Reserved for Sidel</p>
13:00	Networking lunch	
	<p>Stream A NPD & Innovation in Beer Chaired by Kevin Baker, Head of Global Beer & Cider Research, GlobalData</p>	<p>Stream B Strategy through Digital, Presence & Trade Chaired by Mark Dempsey, Senior Consulting Director, GlobalData</p>

<p>14:00</p>	<p>PANEL: The Collaborative Effort, Yet Contradicting Methods in Brewing a Greener Future: Unveiling Sustainable Strategies in the Beer Industry</p> <ul style="list-style-type: none"> • What are some key sustainability initiatives that your brand has implemented and how have they positively impacted your operations? • In a world with limited resources and an abundance of causes, how do you decide which sustainability priorities to focus on? • How do you engage with and educate consumers about your sustainability efforts? • Are consumers really aware of the sustainability efforts behind a brand and how does marketing influence their choices over facts? • If every brewer does sustainability differently, how can beer collaboratively make a bigger difference? • What is the impact on sustainability goals when it comes to on trade and off trade and are consumers aware of the role they play in this? • As the beer industry continues to evolve, what emerging sustainability trends do you foresee shaping the future of the industry? <p>Beata Neubauer – Vice President Strategic Marketing - KÖNIG LUDWIG INTERNATIONAL GmbH & Co.KG Johnny Johnson – Founder – UNLTD. Adrian Klie, CEO Germany, Brewdog</p>	<p>Is it The End of the Brewery Dream? Strategic Business Structures from Brew to Bottle</p> <ul style="list-style-type: none"> • Considering smart business structures to grow the brand and increase market share • Opening doors to different practices to make way for growth and success on smaller margins • Analysing strategic options to reach goals and benefit the bottom line • Leveraging third parties to grow and scale • Deciding on the best direction to take the brand without losing its legacy and consumer loyalty <p>Rob Fink, Founder, Big Drop Brewing</p>
<p>14:30</p>	<p>Activating Ingredients in Beer</p> <ul style="list-style-type: none"> • Focussing on beer that has added value to provide the health-conscious consumer with more • Creating exciting products with active ingredients to tap into new opportunities <p>Reserved for Simatec</p>	<p>Reusable glass bottles: how to enter the growing market?</p> <ul style="list-style-type: none"> • Our robust, lightweight returnable bottle is creating a sensation in this corner of Austria: following Mohrenbräu Pfiff, Mohrenbräu Spezial is now the second beer available from this brewery in the practical and exceptionally sustainable 0.33-litre lightweight glass bottle from Vetropack. It reduces the carbon footprint by as much as 25 percent

		<ul style="list-style-type: none"> • Different challenges bottle manufacturers face when using disposable and reusable bottles • Why innovations like Echovai can help manufacturers overcome technical difficulties? <p>Erich Jaquemar, Key Account Manager for International Clients, Vetropack Evan Williams, Chief Commercial Officer, Vetropack</p>
15:00	<p>Is Beer Anti-Innovation? The Evolution of Trappist Brewing</p> <ul style="list-style-type: none"> • Respecting traditions in beer without falling behind in the times to stay relevant • Looking at innovations and adaptations in trappist brewing to adapt to evolving consumer preferences • Experimenting with new styles of beer, collaborations and modern brewing technique integrations to bring more to craft • Spreading the word of trappist through socials and digital platforms to increase accessibility • Differentiating in a highly competitive market to stay relevant and profitable globally <p>Dieter Lauwers - Head of Export - De Koningshoeven Brewery</p>	<p>Breaking Stereotypes and Navigating New Norms</p> <ul style="list-style-type: none"> • Collaborating with women in sports to position beer as a supporter of social events in modern times • Finding opportunity in the everyday to bring brand awareness and promote growth • Learning from branding “mishaps” and norm-breaking marketing to find pockets of opportunity • Ensuring beer is visible to a wider demographic to bring the drinking occasion to the modern-day beer enthusiast • Building a brand on the demands and desires of today’s beer drinker to promote a more sustainable and collaborative beer culture <p>Katharina Kurz, Founder, BRLO</p>
15:30	Afternoon refreshments	
16:00	<p>The democratisation of craft beer</p> <ul style="list-style-type: none"> • Taking the snobbery out of craft – why gatekeeping is bad for business. • Why it’s ok to simply ‘like’ great beer. • Does the ‘adoption of craft beer by the majors shorten the brand cycle? • How can craft beer co-exist alongside the mainstream – can macro and micro grow alongside each other? <p>John Gyngell, Founder, North Brewing</p>	
16:30	Session reserved for Alexander Sneen, Vice President Marketing, Sinebrychoff	
17:00	Chair’s remarks and close of conference	