



BERENTZEN-GRUPPE
Thirst for life



BERENTZEN EVOLVE 2030

Serving the evolution of consumer behavior



The world after COVID-19

Y-Collective - In a club with 1,500 people. Partying for the first time like before Corona

BUSINESS

Consumer sentiment brightens

28/09/2021

Consumers want to treat themselves and enjoy life more after the lockdown

March 25, 2021 | Press Release

Large crowds

Flensburg is dancing again: This is how the first party at the Deutsches Haus went

PwC survey examines the impact of the pandemic on consumer behavior and retail

German consumers are weathering the Corona crisis relatively well

Consumer Behavior

Customers consume with less guilt than before Corona

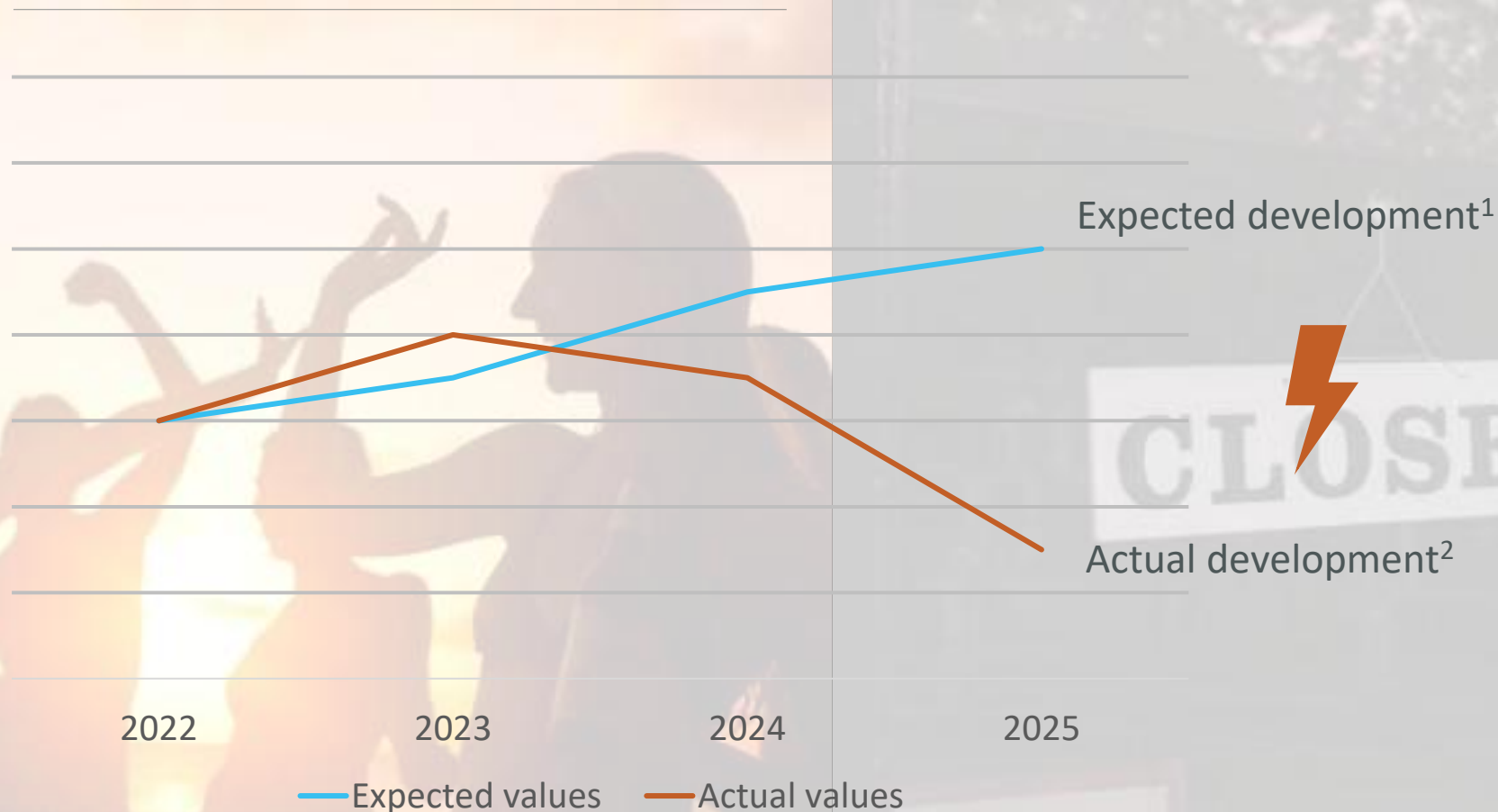
Gastronomy on the rise despite numerous crises: What does the new consumer behavior look like after Corona?



The recovery is being replaced by a new reality

Expected and actual market development

Market development for spirits in Germany
(Index)



1| Statista forecast 2021

2| Circana Market Research Institute



The world has changed

Sustainable transformation of consumer demands is underway

Health trend: Longevity

The hype surrounding longevity

Sober Curious: The NoLo Movement Changing How We Drink

Gen Z is staying away from alcohol, and the spirits industry is reacting.

GfK Consumer Climate

Consumer confidence in Germany continues to decline.

Consumer confidence in Germany is characterized by uncertainty. Consumers expect lower incomes – so they are buying less and saving more money.

study

"Health is becoming a purchasing criterion"



D. Deloitte

The Future of Aging and Longevity

The alcohol-free trend is taking hold: cultural institutions, clubs and restaurants are under pressure – some are already calling for subsidies.

Out of stock: Why more and more clubs are closing down

SPIRITS MARKET

Germans drink less hard liquor than before



The rise of 'sober curiosity': Why Gen Zers are reducing their alcohol consumption

Published: November 25, 2024 11:00pm CET



Revision of corporate strategy

The world is changing



Big Picture



Longevity

Extension of life and
healthy lifespan



Social Network Foot Printing

Cross-channel strategy
with regular active
dialogue



Emerging Markets

Fast-growing emerging
markets with increasing
purchasing power



X as a Service or a Platform / Collaborative Partner

Increased provision of
own services to third
parties to expand the
portfolio



Gen Z & Alpha New Habits & New References

Younger generations
shape modern identities





Implications for the Berentzen Group



New brands and products

Societal change creates new opportunities

“

Our society is changing.

Young target groups are shaping the product and brand landscape with their habits. People are constantly on the lookout for new products – driven by the desire for individuality. More and more consumers are also focusing on products that support their health and longevity.





New markets

Emerging markets with potential for further internationalisation

“

Many international markets are changing.

In emerging markets, the rising purchasing power of a growing middle class is driving demand and fuelling economic growth. Increasing urbanisation is changing consumption habits and opportunities.





New sales channels

Shifts in purchasing behavior create new sales opportunities

“

Shopping behavior is changing.

Consumers are increasingly choosing new retail outlets and sales channels – both online and offline. Growing income disparities are creating demand for both discount and premium products.





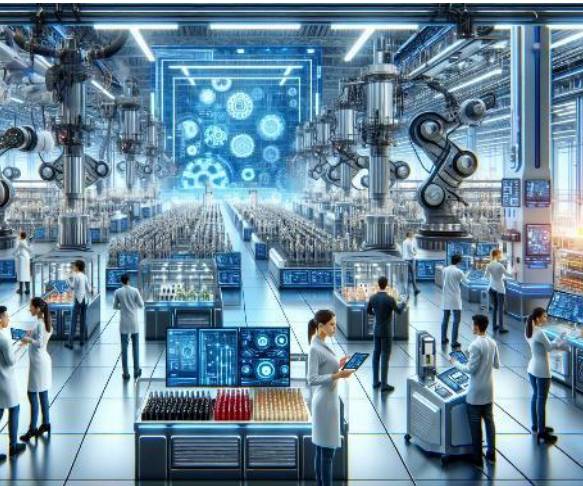
New models of collaboration

Modern forms of collaboration open up new business opportunities

“

Collaborations are changing.

Traditional products are shifting to service-based models, enabling companies to offer customers flexible, tailor-made solutions.





Implications for our business units



New brands and products

Promising concepts with excellent market potential

Functional Lifestyle Drink



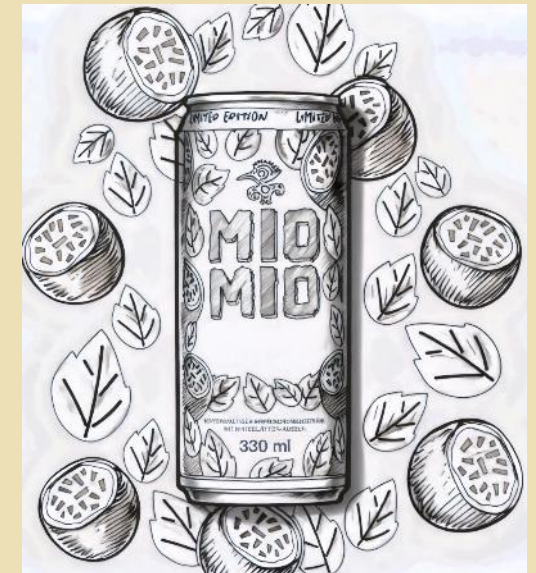
No / Low Spirit



Juice Dispenser



Limited Editions





New brands and products

Promising concepts with excellent market potential

Functional Lifestyle Drink

+118%¹



No / Low Spirit

+25%¹



Juice Dispenser

+13%²



Limited Editions

+19%³



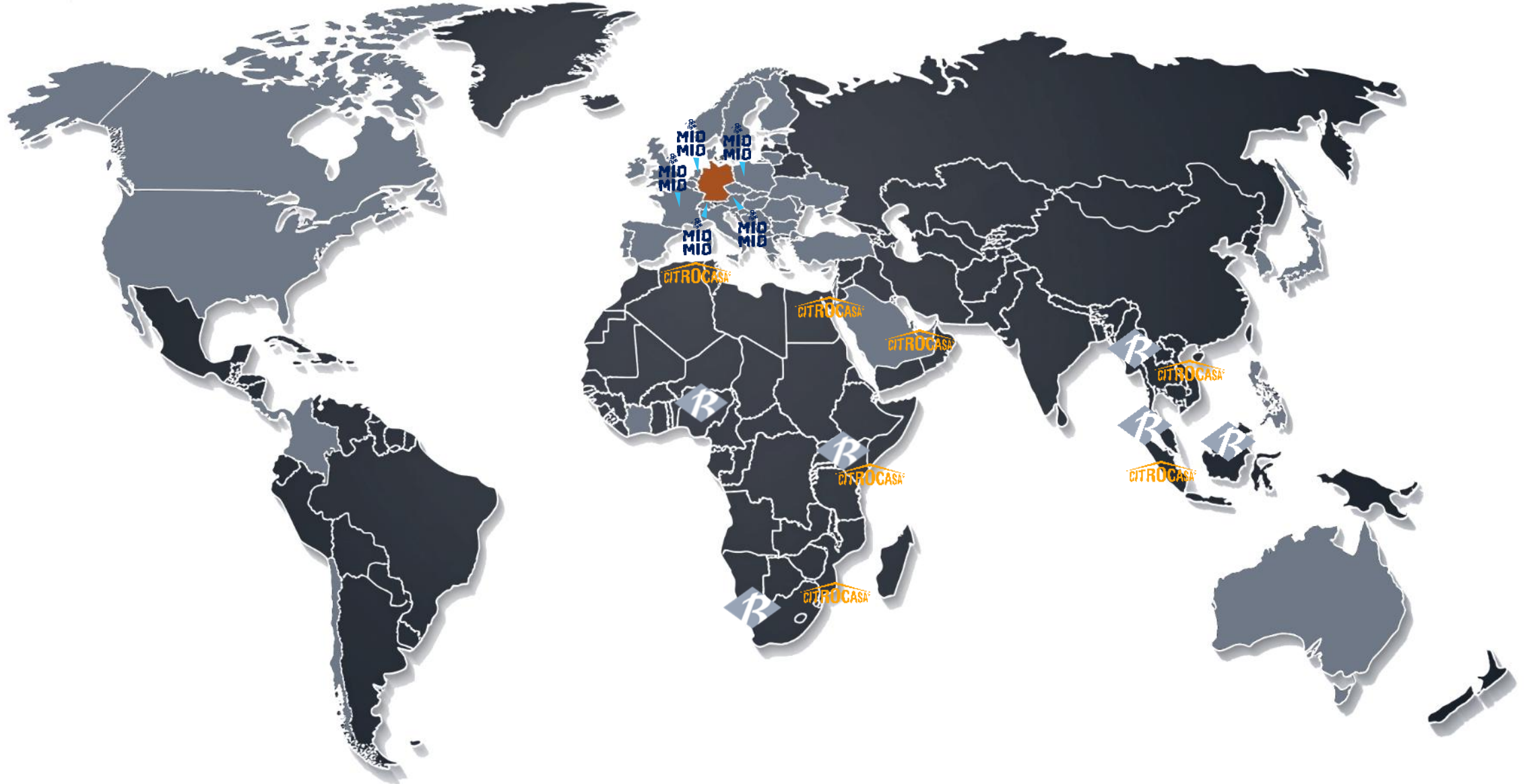
¹ | Market development Oct 2023 – MAT Oct 2025 (Circana) ² | Market for fruit juices 2022-2024 (VdF)

³ | Market for premium and limited editions 2022-2025 (Fortune Business Insights)



New markets

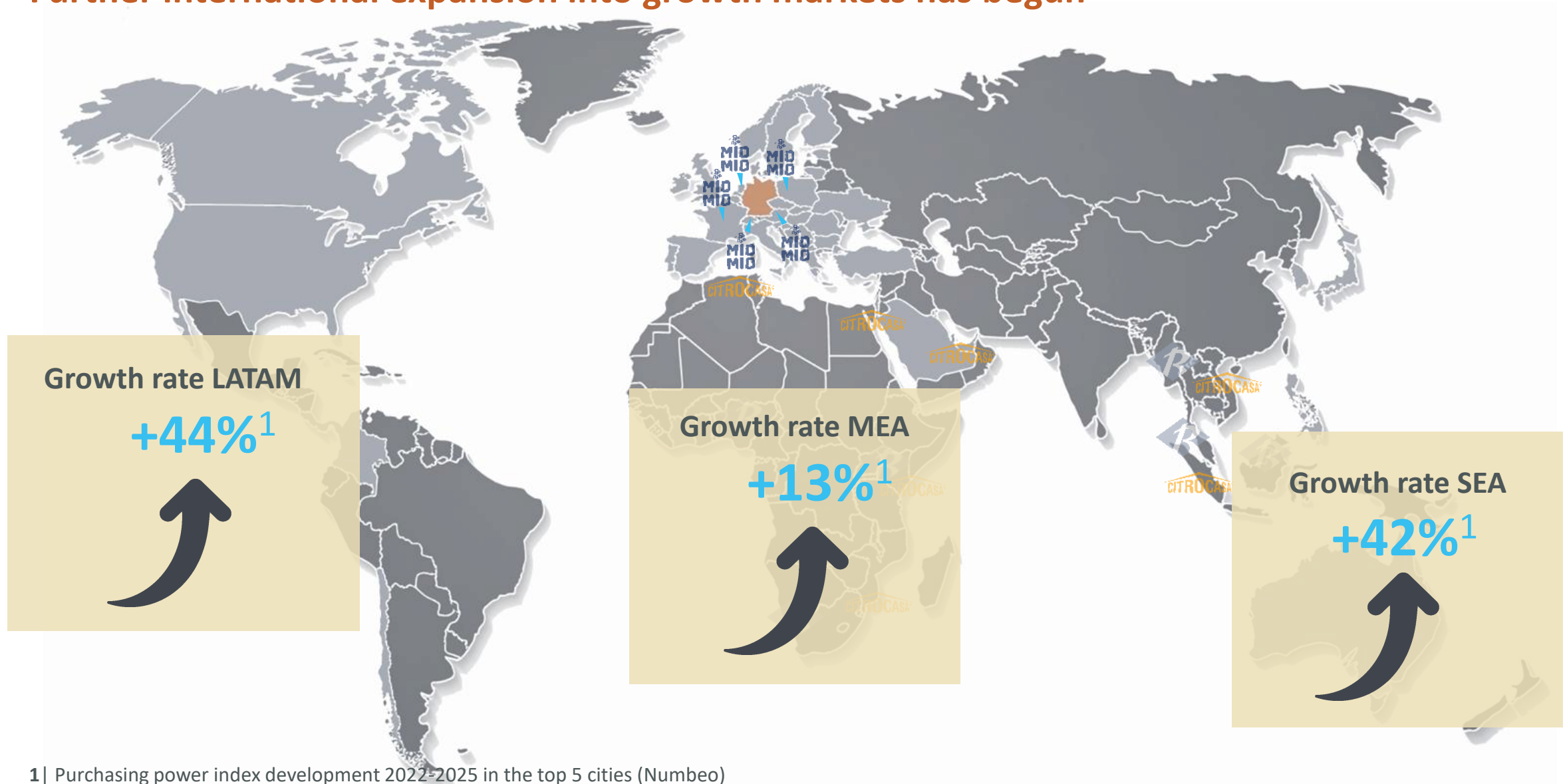
Further international expansion into growth markets has begun





New markets

Further international expansion into growth markets has begun



1 | Purchasing power index development 2022-2025 in the top 5 cities (Numbeo)



New sales channels

Broader presence with additional partners



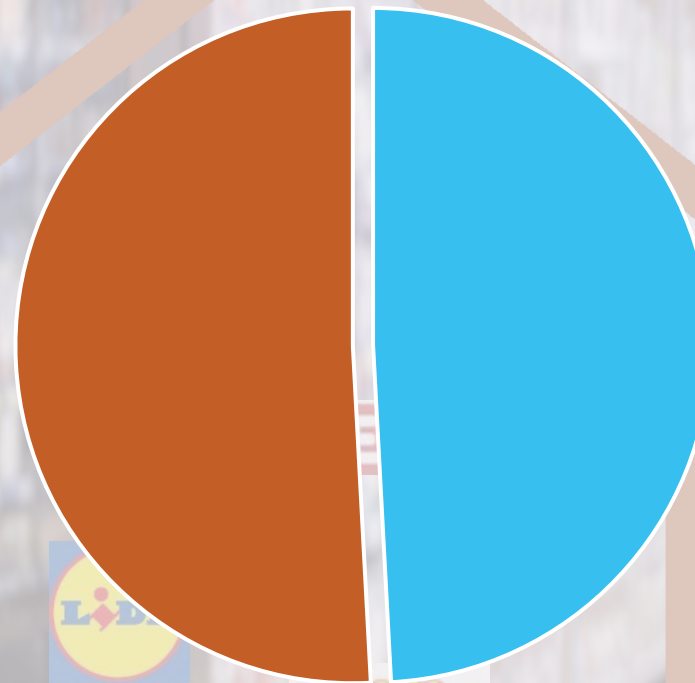


New sales channels

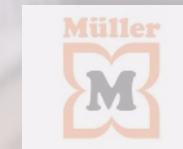
Broader presence with additional partners



Food retail sales
in Germany¹



■ Other Sales ■ Grocery retail's share of total sales

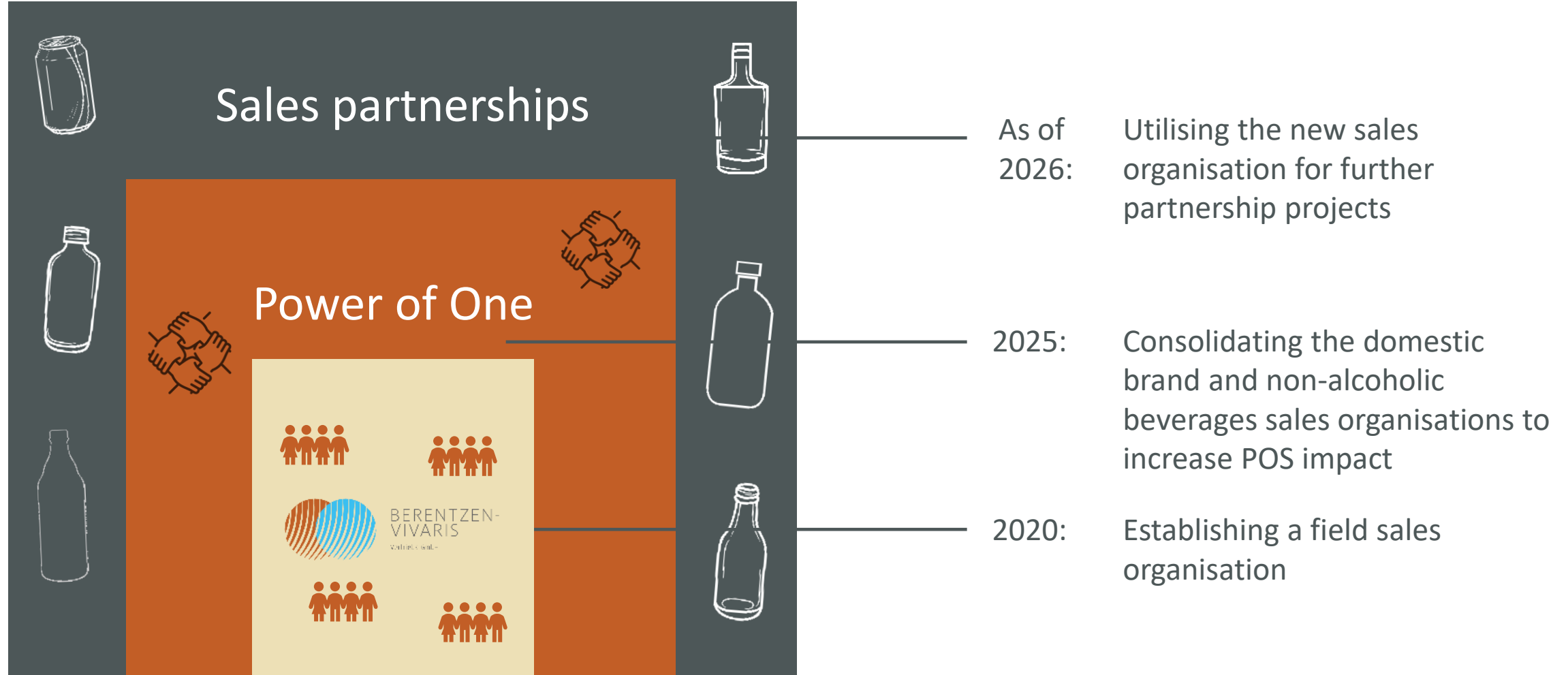


1 | 2023 (BMEL)



New collaboration models

Utilising sales and distribution strength for additional products





Scaling the core

Existing initiatives remain relevant and will be expanded

Berentzen Minis all year long



Premium concepts across European markets



Mio Mio: Full focus on growth



Promotion of Xpro and Fantastic 2.0





The Eventisation of everyday life

Increasing importance of product seasonality

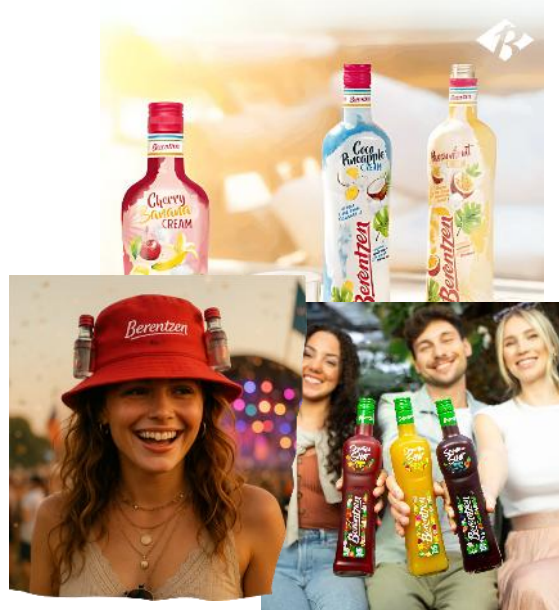


Spring

Summer

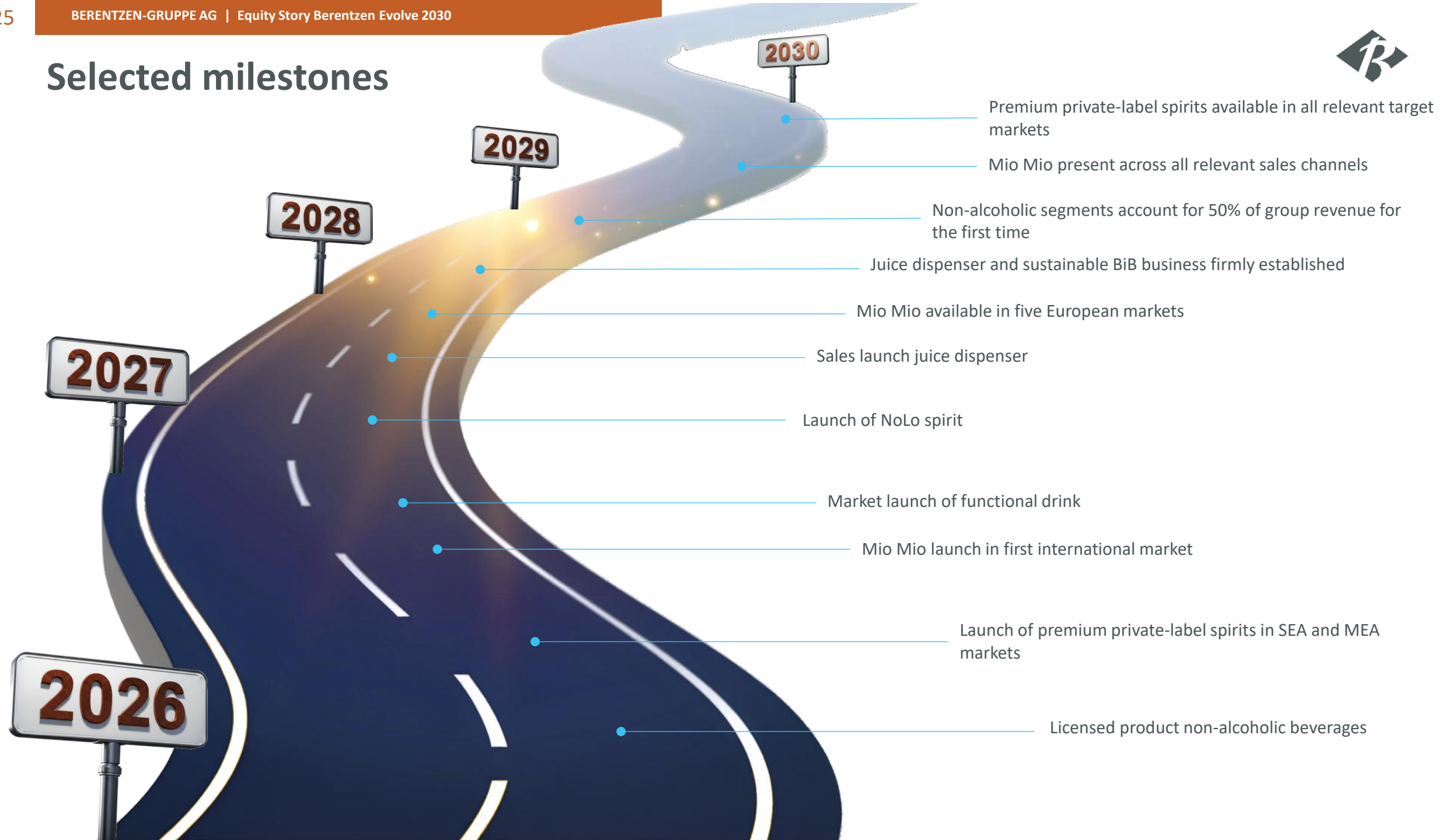
Autumn

Winter





Selected milestones





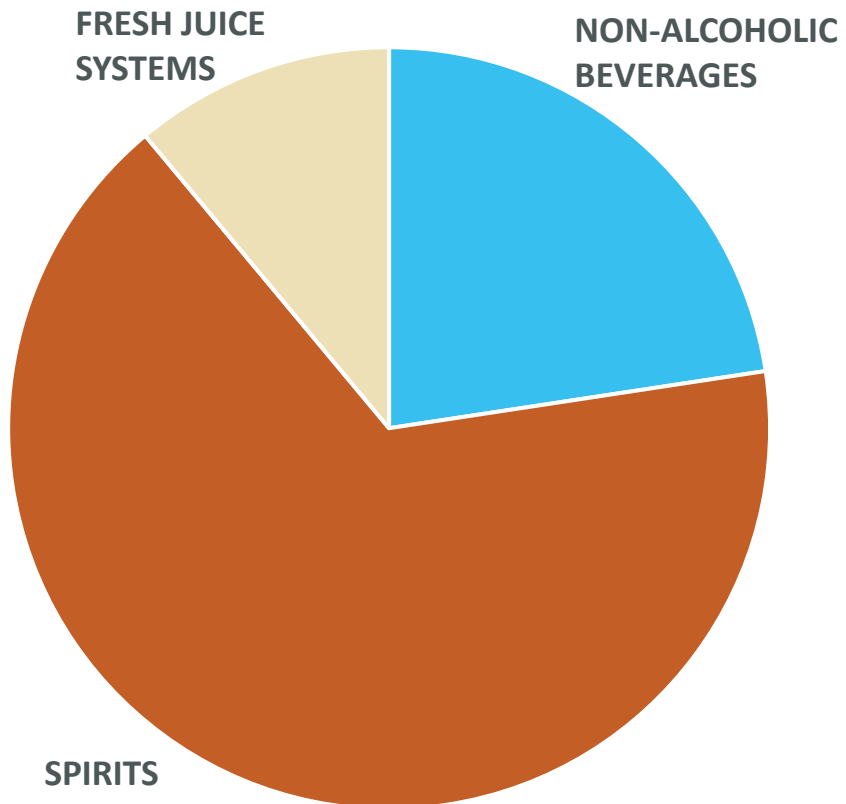
Outlook for 2030



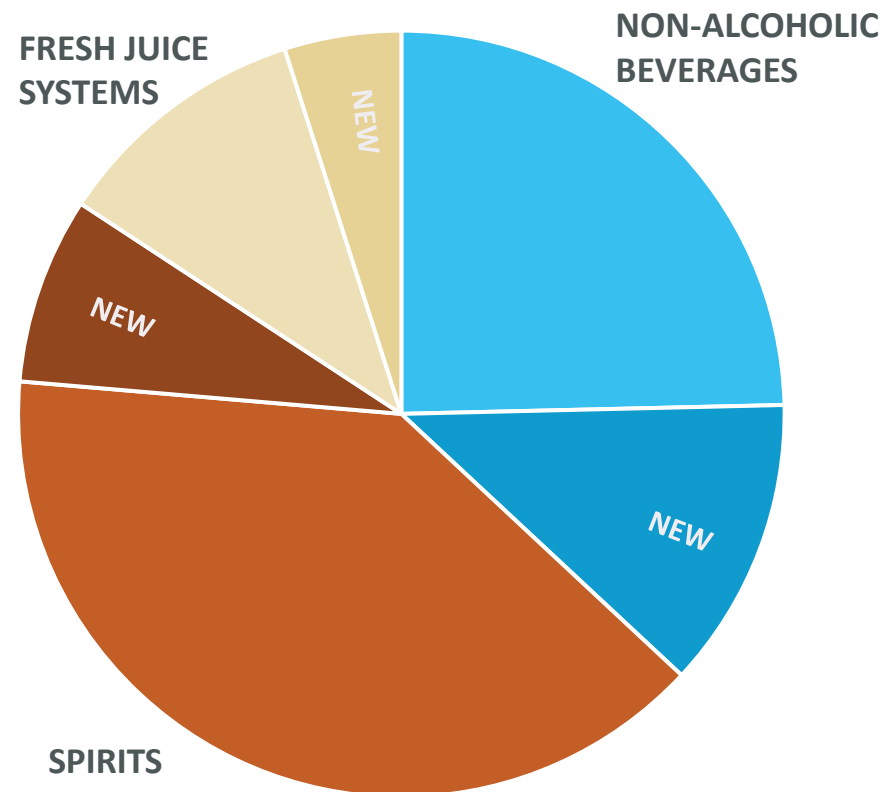
Outlook for 2030

Transformation across all business units with corresponding effects on revenue

Revenue split 2024



Target revenue split 2030



Consolidated revenues

> EURm **200**

EBIT margin

> **8%**



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