A woman with long brown hair, wearing a blue textured cardigan, is smiling warmly at a man whose back is to the camera. She is holding a tulip-shaped beer glass filled with golden beer and a thick head of foam. They are seated at a dark bar counter. In the background, a bicycle is parked near a window, and a colorful abstract painting is on the wall.

***The craft
beer
revolution is
here to stay***

JOANA CARNEIRO, DSM

BRIGHT SCIENCE. BRIGHTER LIVING.™



My passion for beer

- Beer 'roots' in Porto.
- 13 years in Delft, the Netherlands.
- Two daughters.
- Prefers bitter beverages.



The craft revolution in brewing

- What do consumers really think?
- Beer & diversity.
- Provenance & Sustainability.
- Opportunities for the beer industry.



What do consumers really think?

Global consumer insights report

3,300 consumers in 7 countries in Europe and US, including Belgium.

More people are drinking craft beer - and it's the under 30s who are leading this revolution

Drinkers around the globe place more emphasis on provenance and sustainability

Craft beer drinkers put quality and taste above everything else, including price

Craft drinkers are adventurous, with only 50% expressing a specific brand loyalty

Craft beer is here to stay: Some 80% of craft drinkers will continue to try new brands



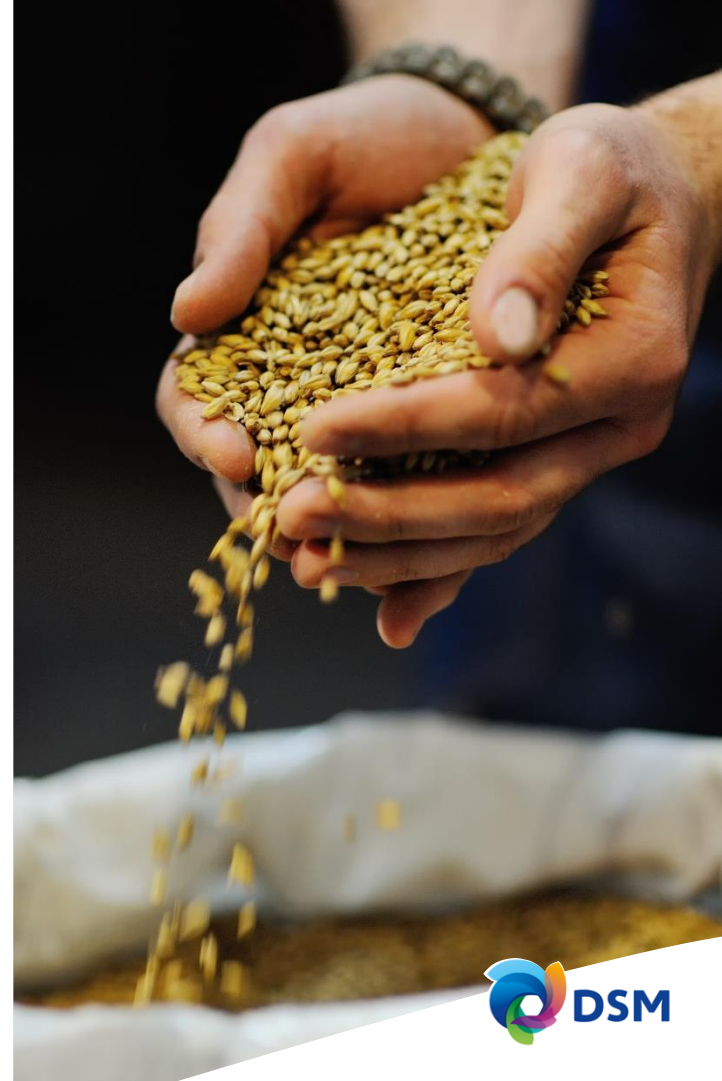
Beer & Diversity

- Craft beer is for all ages with 1 in 4 respondents from Italy, UK and Belgium drinking only craft beer.
- The under 30's lead the craft revolution.
- 20% of women in Belgium only drink craft beer.
- 52% of female respondents in Belgium like to try new beers.
- More than half of the women in the UK, Italy, France and Spain like to experiment with different beer brands.



Provenance & Sustainability

- 80% of French respondents, 78% of respondents in UK and 55% of Spanish respondents find locally brewed beers more attractive.
- Spanish respondents find organic and clean label beers more attractive than locally brewed beers.
- 55% of the French respondents and 58% of Italian respondents find sustainable beer more attractive.



Opportunities for the beer industry

- Taste is key for craft beer consumers with 75% of our respondents favoring taste above price.
- Craft beer consumers ready and to pay more for a high-end product.
- 80% of our global respondents think craft beer is here to stay.



24% of Spanish respondents find gluten-free beer more attractive

Opportunities for the beer industry

- Speak to individuals rather than to segments.
- Educate consumers on the work that is being done in the industry concerning sustainability and social responsibility.
- Remind consumers that locally brewed beer means a radically reduced carbon footprint.



***For
sustainable
brewing
ambitions***



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