Promoting Genever in Europe - Genever Traditions Back in the Spotlight

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ABSTRACT

Genever producers from The Netherlands and Belgium have gathered together to execute a three year promotional campaign to promote European genever throughout Europe. To realize the campaign and get the desired results we will apply for a European subsidy.

Genever has a rich history throughout the world and was the most consumed spirit at the end of the 19th and the beginning of the 20th centuries. In cocktail books from that time (e.g. Bartender's Guide by Jerry Thomas, written in 1862) Genever is a main ingredient and an important base spirit in many classic cocktails. Both World Wars (which led to grain shortages) caused the eventual demise of Genever export and Genever vanished from the world stage. As Genever was once a thriving product of the Lowlands (The Netherlands and Belgium), we believe this is the time for a comeback.

Promotion of products with specific features and characteristics of the European Union (hereafter "**EU**") like Genever, which has its own protected geographical indication, is very important. The EU provides the protection for certain geographical product names which are linked to a particular territory, with the aim of protecting traditional production methods and to ensure the consistent quality of the product. Throughout the promotional campaign the premium quality and rich craft culture of genever will be promoted, which also strengthens the market position of other EU products with a high quality and rich culture.

To promote European genever throughout Europe the following key messages of quality, taste, diversity and traditions will be communicated throughout the promotion campaign:

Genever: the most versatile spirit from Europe

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- European genever is the most versatile spirit, suitable for a broad range of consumption occasions, with a strong link to classic and modern cocktails because of its added depth of complexity and its similarities to both gin and whisky;
- European genever is made with traditional, craft, artisanal, production methods, has a unique high quality taste, and an incredible range of products across its various styles and expressions;
- European genever has a very rich history, with development of the product dating back more than 350 years, and at one time was dominant in the cocktail culture, having the position gin now enjoys;
- Evidencing both the quality and unique character that European provenance gives this product.

To communicate these key messages, the following set of complementary activities will be executed:

1. Media campaign
2. Trade fairs
3. Category activation: Genever community
4. Tasting promotion kit

1. PRESENTATION OF THE PROPOSING ORGANISATION

1.1 Representativeness of the proposing organisation for the sector(s)

Spirits NL

Spirits NL is the Dutch trade association of producers and importers of distilled spirits, recognised by the member state (The Netherlands). Spirits NL currently includes 24 members covering together approximately 90% of the total volume of the Dutch spirits market and ca. 85% of the Dutch genever market. Members of Spirits NL include the leading multinational companies in the spirits world as well as several small family owned spirits companies.

Spirits NL's mission is to represent, defend, and promote the Dutch spirits sector and help its members achieve sustainable business growth. Spirits NL aims through socially responsible actions to achieve the best possible balance between the interests of the spirits sector and society.

Spirits NL's objectives are to:

- Promote understanding of the Dutch spirits industry to Dutch decision-makers.
- Defend the freedom to produce and market spirits in a responsible way by securing appropriate legislative conditions for production, marketing, distribution and sale of spirits within the Netherlands.
- Secure no discriminatory treatment of spirits in comparison to other alcoholic beverages.
- Encourage the industry to implement high standards for marketing communications.
- Stimulate responsible drinking.
- Provide meaningful information online, to consumers ranging from calorie information to alcohol content and responsible drinking messaging.

Vinum Et Spiritus

Vinum Et Spiritus is the Belgian federation of the wine and spirits sector. Its 95 members are producers and/or traders of wine and/or spirits. Of these members, the spirits producers cover approximately 97 % of the Belgium genever market (as at 2016). The association has grown into a heterogeneous collection of small, medium, and multinational companies in the sector. They represent their members at all levels, stand up for their interests and facilitate them in the pursuit of sustainable economic growth.

Vinum Et Spiritus wants to be a partner of government and expertise centres in promoting a culture of responsible drinking as part of a balanced lifestyle, discouraging excessive alcohol consumption, and tackling problematic and harmful use.

Vinum Et Spiritus objectives are:

- Expressing our duty of care with regard to society, through awareness campaigns on responsible and moderate consumption and through our contribution in the field of sustainability;
- To represent the economic interests of the sector, including the pursuit of a balanced tax system;
- Ensure and protect a positive regulatory framework for the production, promotion, distribution and sale of wines and spirits;
- Coordinate the structural promotion of the various product groups to promote sales opportunities at home and abroad;

- Frequent and efficient information exchange with the members and offering them a platform that makes active involvement possible;
- Providing operational services to our members.

1.2. Experience with information/promotional campaigns

Spirits NL (and its predecessors, including the Product Board of Beverages/Productschap Dranken) have executed the following projects for promotion of genever:

- GeneverGenootschap: In the Dutch spirits culture 'the GeneverGenootschap' takes a prominent position. The GeneverGenootschap was established in 1995 on the initiative of the majority of the Dutch genever distillers. The GeneverGenootschap aims to bring positive attention to the Dutch spirits sector. Its focus is not to promote consumption of more genever, but above all to make clear that the Dutch national spirit genever is amongst the best distilled products that the Netherlands has to offer. Many Dutch celebrities (politicians, artists and members of the business community) are members of the GeneverGenootschap. Each year new members (and ambassadors and commandeurs) are introduced into the GeneverGenootschap. The GeneverGenootschap organises annual activities for its members.

- Jenevercafes: In The Netherlands Spirits NL has introduced 'genever bars', in Dutch the so-called 'jenevercafes'. To become recognised as a 'genever bar', the bar needs to serve at least 15 different brands of genever, divided into at least three different 'jonge jenevers', of which two need to be of ethyl alcohol of agricultural origin obtained exclusively from grains, and two different 'oude jenevers', of which two need to be made of ethyl alcohol of agricultural origin obtained exclusively from grains.

- Jenever festival & National Jenevermuseum: The predecessor of Spirits NL introduced the Jeneverfestival to The Netherlands and organized this for three consecutive years, before the town of Schiedam wanted to take over. The town of Schiedam nowadays organizes this annual genever festival (www.jeneverfestival.nl) and in 1996 the predecessor of Spirits NL, together with other stakeholders, founded a national genever museum (www.jenevermuseum.nl) in Schiedam, the Netherlands (see Figure 1). From 1996 until 2015 Spirits NL held a position on the board of the Jenevermuseum.

Figure 1. Nationaal Jenevermuseum (Genever Museum) in Schiedam, The Netherlands

- Promotion of European Genever in the United States: In 2017 Spirits NL was granted a European subsidy to promote European Genever in the United States, together with five of its members. This promotion project entails a Media Campaign, Trade Fairs, Study Tour and Category Ambassador

Program and is focused on several key cities within the USA. Read more about this project in 2.2 Reasons for promoting genever throughout Europe.

In the past genever has been promoted by a variety of regional entities that are all indirectly linked to Vinum Et Spiritus:

- Fellowships / Confreries: The Confrérie of the Hasselt Jenever promotes the Hasselt Jenever at home and abroad at the level of quality, tradition and gastronomy. In Hasselt there are annual genever festivals (http://www.jeneverfeesten.be). Every third weekend of October, the genever town is dedicated for two days to spectacle, music, gastronomy, conviviality and of course the Hasselt Genever. More than 160,000 visitors were received at the 2017 edition.

The Order of the East Flemish Master Distillers uses numerous events to keep the East Flemish traditions related to genever vivid: An annual Chapter during the Horeca Expo exhibition, in which meritorious individuals are intrigued; Participation in events such as trade fairs, receptions, cultural events. The organization of the exhibition "Borrelend Oost-Vlaanderen: Genever, a fascinating experience" during the Geneverfestival and at the International Jaarbeurs in Ghent, Month of the East Flemish grain genever: from October 25 to November 25. The O'de Flander Geneverfestival 29 and 30 November 2014: For the first time this initiative was organized by the Bar in 2011 to put the European recognized regional product O'de Flander grain genever in the spotlight. The intention is to strengthen the image of genever. Coordination is done by the East Flanders Economic Council. All member distilleries of the Order of the East Flemish Master Distillers present their range of genever to the public. In Wallonia, in the south of Belgium, various societies/confreries ensure that the genever (Peket) traditions continue to live. The Peket d'Namur (1996) society, the association of master brewers and distillers of Wallonia (1977) and the Pèkèt d'Serè (in Seraing) society, fired their own genever and promoted local genever.

- Genever museum: Hasselt houses the Genever Museum, which is housed in the former distillery Stellingwerff / Theunissen on the Witte Nonnenstraat 19. This distillery site is the first industrial site that was protected in Belgium as a monument (1975). The city of Hasselt purchased the distillery complex in 1979 with the intention of accommodating a museum. The living and working areas of this distillery are integrated and clearly tangible in the museum trail. From the ox shed it goes to the boiler and mill room. The Genever Museum considers it its mission to make (young) adults 'jeneverwijs'. They gain insight into the origin, development, location and perception of the product gin in an interactive way. The museum offers a scientific reference framework for genever heritage and current affairs and stimulates the appreciation of the product in all its facets. The museum presentation shows a large selection from this collection, which now covers almost 25,000. With collection pieces, photos, audio and video fragments and multimedia and sensory interactives, the Jenever Museum brings in 3 chapters the genever story of Belgium and by extension the Lowlands to life:

1. The production process from grain to drink
2. 2.000 years distilling: the history of genever
3. Ge-neverending story: the metabolism of genever and the flavours of genever.

The Genever Museum annually receives an average of 45,000 to 50,000 visitors from the Netherlands and abroad. In addition to the extensive cultural touristic offer of the Jenever Museum (permanent presentation, exhibitions, lectures, workshops, master classes, etc.), the mutual influence of the city and genever is also reflected in a social and cultural connection.

1.3 Financial capacity of Spirits NL and Vinum Et Spiritus as proposing organisation

The activities that are performed by Spirits NL are financed by membership fees. The membership fee is based on the hectolitres of alcohol that are produced for the Dutch market. As shown in the attached annual accounts, Spirits NL has a good financial capability and balanced budget.

The activities that are performed by Vinum Et Spiritus are financed by membership fees. The membership fee is based on the turnover made in Belgium and abroad.

2. PRODUCTS/SCHEMES AND MARKET ANALYSIS

This project focuses on the promotion of the characteristics of European genever throughout the Union, with focus on the specific characteristics: quality, taste, diversity, traditions and authenticity.

The expected impact is to increase the awareness of the merits of genever as a European agricultural product and to enhance the competitiveness of genever, raise its profile and increase its market share.

2.1 What is Genever?

Popular since the 17th century genever is the largest spirit category in the Netherlands and Belgium. The juniper berry, jeneverbes in Dutch, lends its name to the drink, jenever – or genever in English.

Malt spirit + Juniper berries + botanicals
Unaged or barrel aged

Genever, by definition is a combination of malt spirit and juniper berries (and other botanicals). It is incredibly diverse in its styles and versatile in its uses, drawing on a rich heritage of historical craft from Europe.

The essence of genever: quality, taste and diversity

Genever is a complex spirit and one with a rich history. Every genever is unique, with its own recipe and flavour, using artisanal processes down to the last, little detail.

Many spirits experts consider genever to be one of the most versatile and interesting spirits, because:

- The variance in the balance of juniper, malt spirit, botanicals, distilling, and blending techniques, allow for an enormous diversity of flavour delivery; from aromatic, zesty, and fresh, through to earthy, malty, and rich.
- Unlike many categories a genever can be aged in barrels or may be unaged, allowing for even more complexity of flavour.
- It truly bridges the gap between transparent and aged spirits, ranging in styles from the crispness of gin to the oaky richness of whisky.
- The craft of making genever has been around for more than 350 years, and yet the industry remains a source of constant experimentation, and innovation.

Flavour pioneers: authenticity and tradition

Genever was once one of the largest European exports. Thanks to pioneers (e.g. Herman Jansen, Simon Rutte, Hero Jan Hooghoudt, Karel Lodewijk Filliers and Gerard Smeets) all the historical knowledge that was acquired about the amazingly complex process of making genever is still available today. This knowledge enables genever distillers to work on new flavours and expressions with just as much enthusiasm and passion as they did in the old days. The result is genever, in which tradition and innovation meet. A new world of maltiness, herbs, spices, extraction, distillation, aging, and blending.

What makes genever different from other spirits?

Genever represents a variety of expressions that is only rarely found in other distilled spirits, with a unique production process (see Figure 2). Since 2008, Genever has a *Protected Geographical Indication* status (PGI). Genever is a regional product that may only be produced in The Netherlands, Belgium and small parts of France and Germany. It can be rich in botanicals with predominantly

juniper berries but also often includes other key botanicals such as coriander and angelica. On the other end of the spectrum it can be full of malt and the dark aroma of years aging on wooden casks. The diversity of products and styles is reflected in the versatile opportunities this spirit gives the consumer to enjoy it. From sipping it neat or pairing it with beer or food, to mixing it in cocktails. The bartender can use it to recreate the original genever based classic cocktails that predate World War I, or use it to push the boundaries of their creativity – the way genever has been used for hundreds of years.

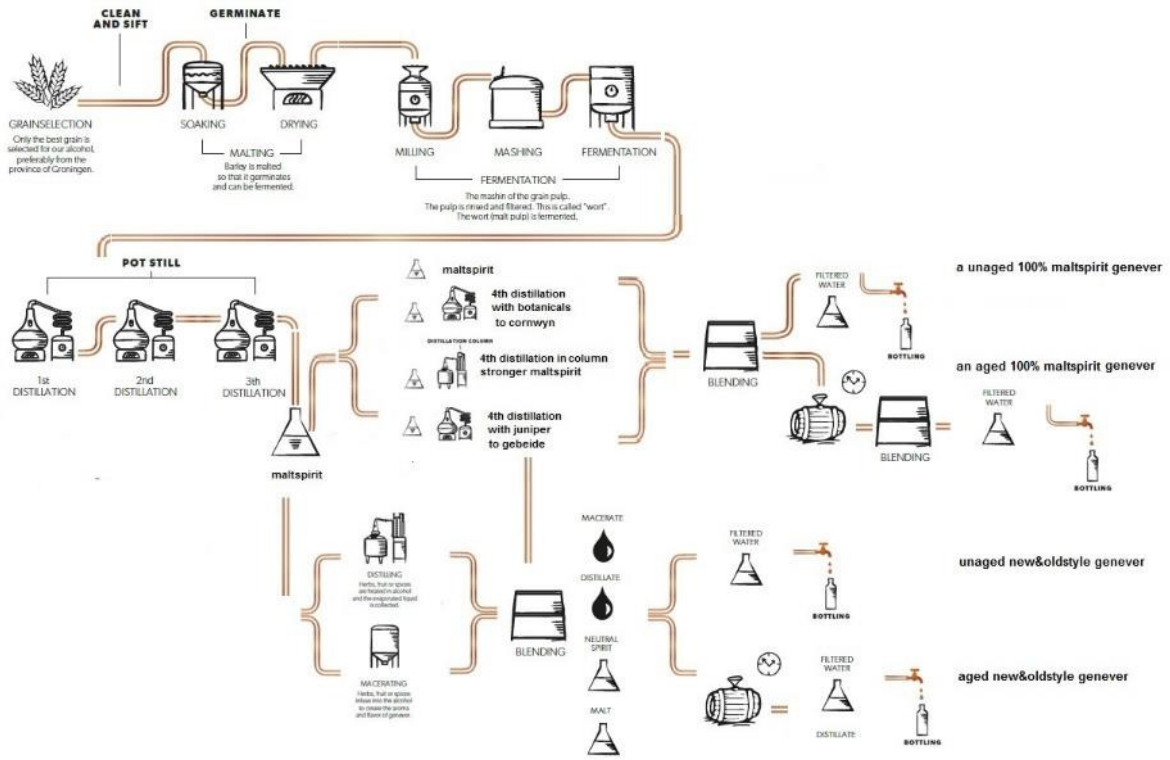


Figure 2. The process of making genever - overview

2.2 Reasons for promoting European genever throughout Europe

Current Genever market Global

European genever producers are looking for a new market for their product, to secure enough demand, which will secure the traditional production of genever. The forecast of global genever consumption shows a decline in volume and market share. This emphasizes the necessity to act as a category now and strengthen the European market with a collaboration of genever producers. The effort from the genever producers in the past decade also shows there is a market potential, as the awareness of European genever has increased recent years. At the moment it still has only a very small market share, and largely driven by the efforts of one or two small brands. However, with the execution of this promotional project, where the whole sector will work together to expand this dynamic category, it is expected that genever will substantially increase the market share.

Category	2009	2014	F 2020	Mkt Share 2014	Mkt Share F 2020	CAGR 09 to 2014	CAGR 14 to F 2020	Vol Chg 14 to F 2020
World Total	52,695.5	49,211.8	48,989.5	100.0%	100.0%	-1.4%	-0.1%	-222.2
Gin	48,660.1	45,986.7	46,072.2	93.4%	94.0%	-1.1%	0.0%	85.5
Genever	2,580.0	2,000.2	1,827.9	4.1%	3.7%	-5.0%	-1.5%	-172.2
Juniper-Flavoured	1,455.4	1,224.9	1,089.4	2.5%	2.2%	-3.4%	-1.9%	-135.5

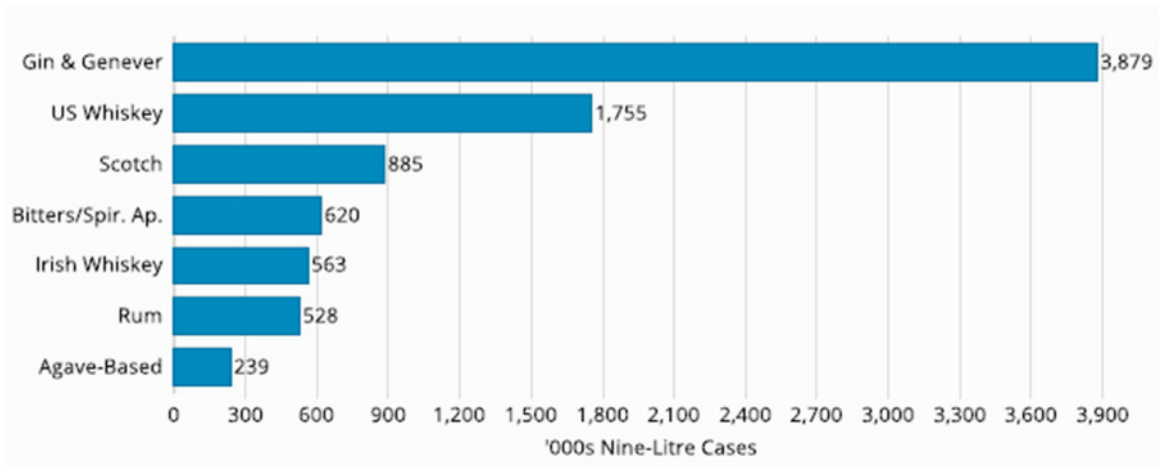
Source: IWSR Calculations *All volume figures in '000s nine-litre cases*

Figure 3. World total of genever consumption in 000s of 9 Litre Cases: 2009, 2014, forecast 2020

Current Genever market in Europe

A similar negative trend is visible in the European market for the consumption of Genever. In Europe, with the exception of The Netherlands, Belgium, France and Germany, gin and genever are often declared as one category in research data. The data for some of the main spirits and in particular gin markets show that Genever overall is losing volume while gin is still growing. Spain is the only market showing a positive trend for Genever. Despite this the IWSR has detailed some positive indications for genever in its most recent report:

> "*Genever is only significant in two main markets, the Netherlands and Belgium & Luxembourg, which together account for 99% of volumes. Total consumption maintained a long-term downwards trajectory last year, falling by 5.2% or around 90,000 nine-litre cases. This was due to the category's aging traditional consumer base and failure to win over new consumers, plus greater competition from gin. There have been positive developments at the top end of the market, however, with some on-trade outlets in the Netherlands actively promoting young genever for use in cocktails.*" (IWSR 2017: Global Trends Report, p.74).



Source: The IWSR

	2016	2021	CAGR 2016-'21
Total	280,177	278,078	-0.2%
- Vodka	69,045	66,150	-0.9%
- Scotch	35,609	36,493	0.5%
- Liqueurs	30,324	29,329	-0.7%
- Rum	21,429	21,957	0.5%
- O. Brandy	23,874	21,403	-2.2%
- Bitters/Spir. Ap.	20,430	21,051	0.6%
- Gin & Genever	16,232	20,110	4.4%
- Others	63,235	61,584	-0.5%

Source: The IWSR

Figure 4. IWSR Forecast Global Summary 2017: 2017-2021 Regional Forecast: Europe p.39

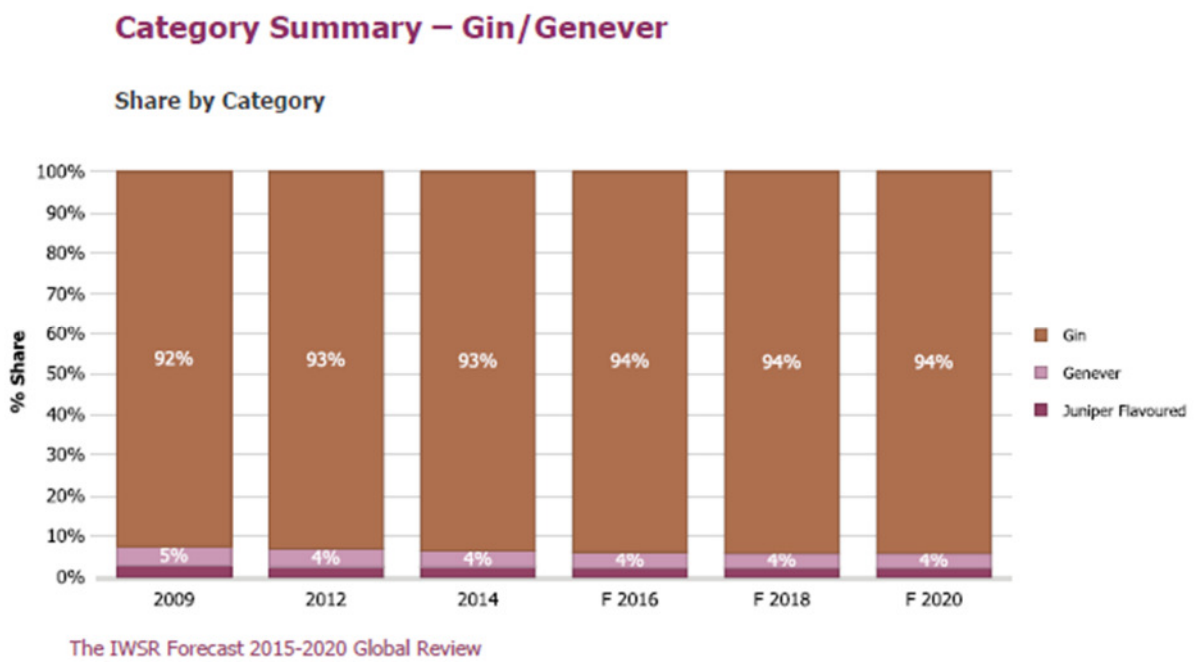


Figure 5. IWSR Forecast Global Summary 2017: 2017-2021

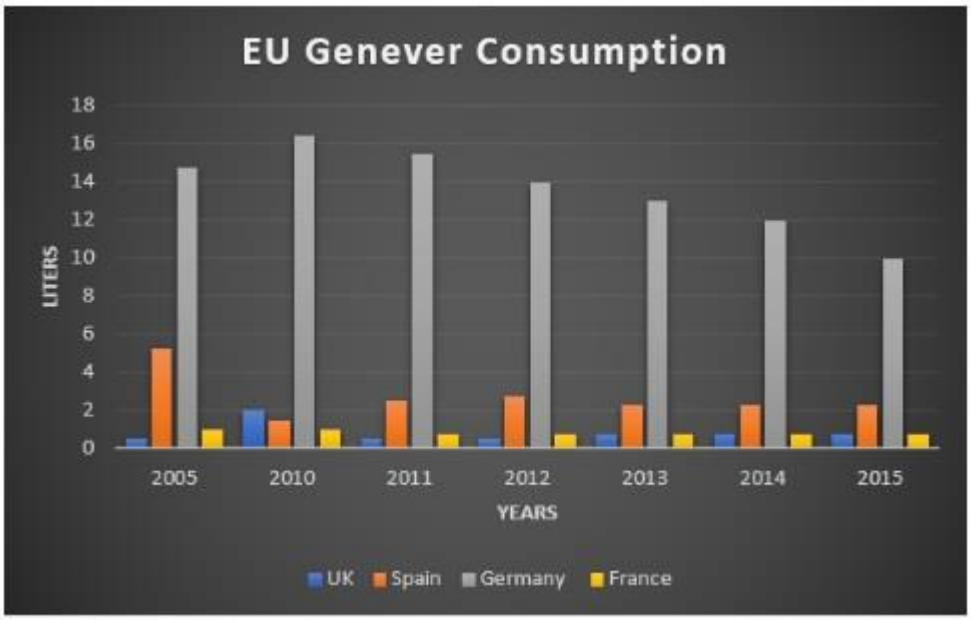


Figure 6. IWSR EU Genever consumption ('000 nine ltr cases): 2005, 2010, 2011, 2012, 2013, 2014, F'cast 2015

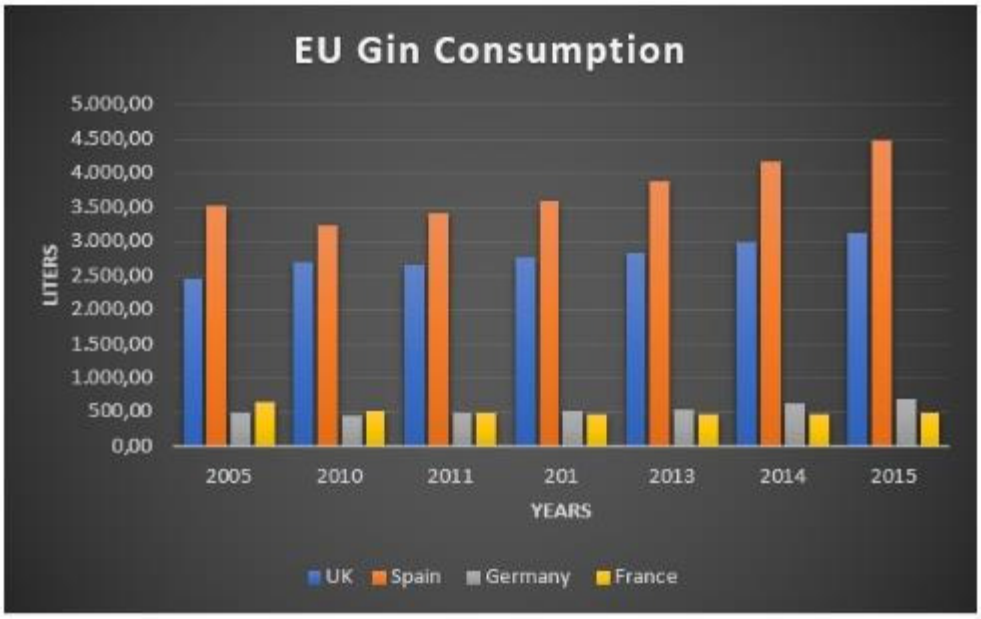


Figure 7. IWSR EU Gin consumption ('000 nine ltr cases): 2005, 2010, 2011, 2012, 2013, 2014, F'cast 2015

Figure 4 shows that on the surface the gin/genever category shows a large category growth, but if we look deeper, Figure 5, we see that this is due to the fact that this category is 94% gin. When we split the category, Figure 6 and Figure 7, we notice that genever has a small decline in the category for the target countries.

The Homebase of the Genever Category: Belgium and The Netherlands

The heart of the genever producing area shows a significantly higher overall consumption of genever compared to gin, yet it is also losing volume continuously.

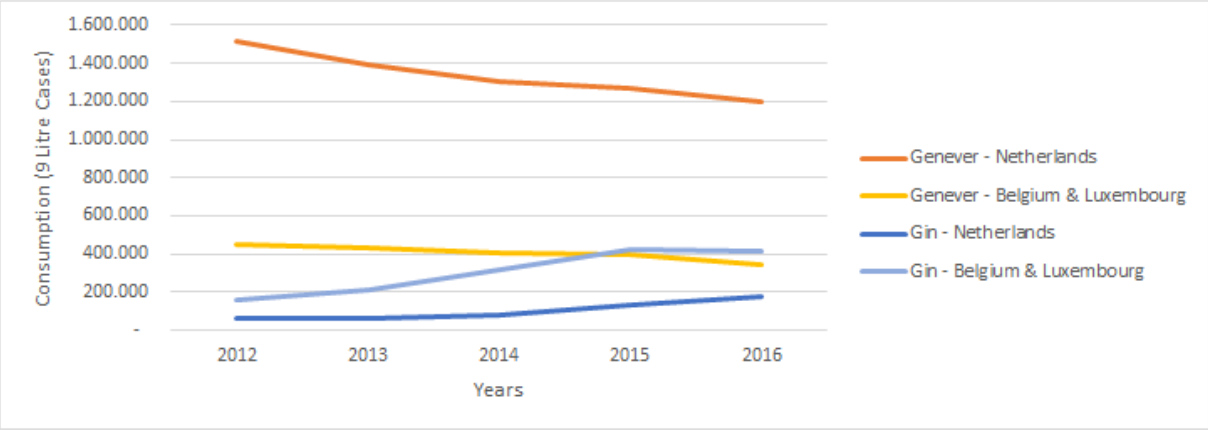


Figure 8. Genever consumption in the Netherlands and Belgium & Luxembourg: 2012-2016 (source: IWSR)

Trend: Revival of the Cocktail Culture

Genever has a cocktail history that no other category can offer and with an increasing amount of interest from high-end and premium bartenders that are looking into old cocktail books from the 1860s to 1920s, finding a wide range of cocktails that specifically ask for the use of this unique spirit. Additionally, unaged Genever lends itself perfectly to replace gin in cocktails, while aged propositions can easily shine in Whiskey drinks.

> "*The popularity of cocktails and interest in mixology continues to rise in most of the countries of the region, including the Czech Republic, the Netherlands, Ireland, Switzerland, Spain, Portugal, Italy, Germany, Poland, France and the UK.*

As a result, basic cocktails are becoming increasingly available even in normal on-trade outlets, while high-end mixology bars are popping up across many major cities. This is helping to boost consumption of premium spirits in general, but particularly of those varieties used in popular cocktails. Furthermore, a new class of professional bartender is helping to educate consumers about lesser-known categories and brands, while bringing the latest trends from other parts of the world. Such is the popularity of cocktails that the trend has also shifted to the on-trade in some cases, with home cocktail making on the rise in markets like France, the Czech Republic and the Netherlands." (source: IWSR Global Trends Report, 2017)

Trend: Craft & Heritage

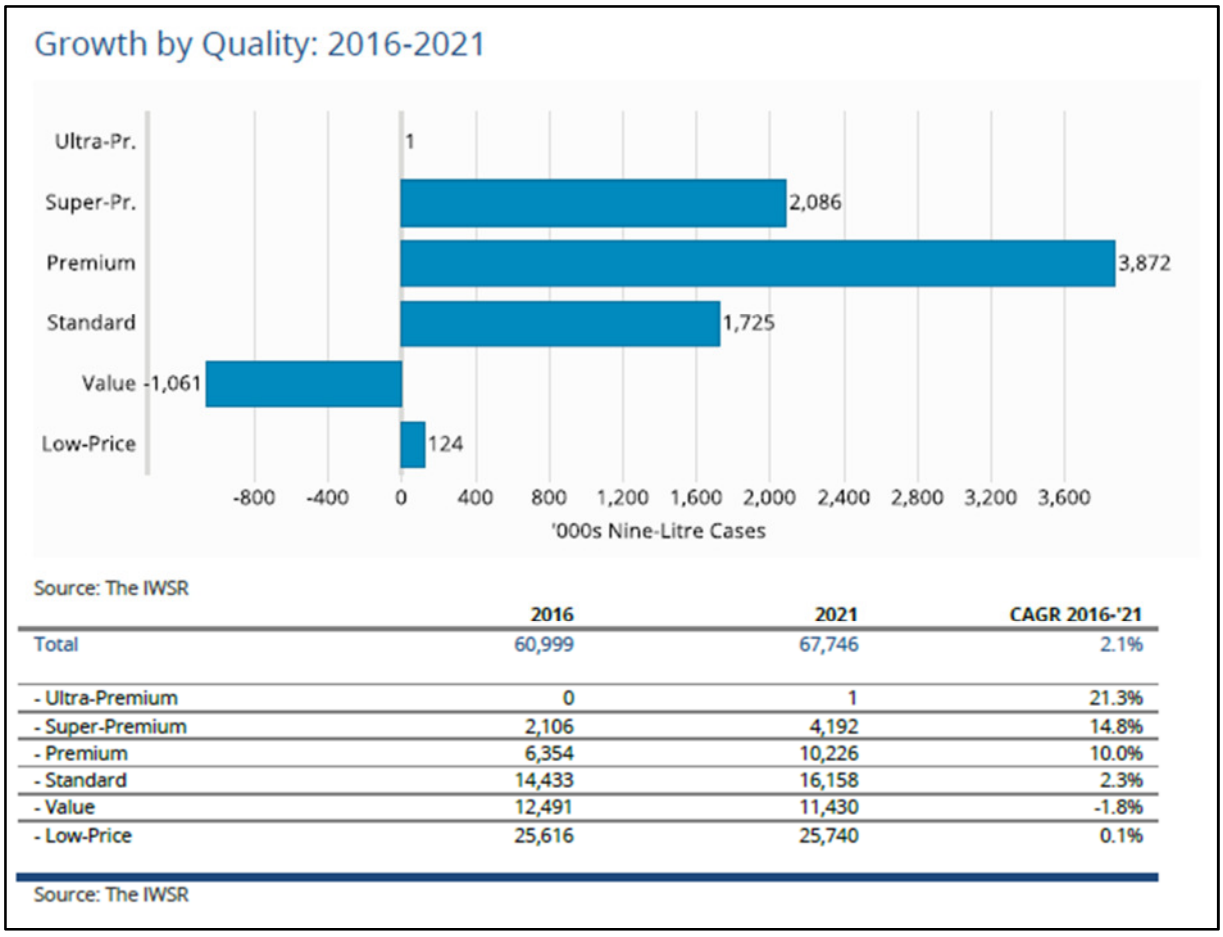
Although volumes remain small, the craft trend within spirits continues to grow and spread geographically, making its influence felt across most alcoholic drinks categories. Consumers increasingly seek out unique and interesting products that reflect their values, focusing on attributes such as quality, authenticity and provenance. This also is reflected in the increased interest in previously poorly viewed local spirits, such as Brazilian Cachaça or Pisco in Peru and Chile (IWSR 2017: Global Trends Report, p.26f), but also the growth of classic cocktails and the increased willingness amongst consumers to try lesser-known categories (IWSR 2017: Global Trends Report, p.35).

With Genever, the distilled spirit from Europe with the longest heritage, reaching back almost 350 years, the categories high authenticity and participating companies that invest in the quality of their products, Genever is well set up to be the spirit that a new generation can identify with.

Trend for premiumization

Throughout spirits categories there is a general trend towards premiumization, which means consumers may be drinking less but they are drinking better quality products and spending more per serve. While the low-price and value spirits segment decreased by -2.3% last year and standard price segments stayed flat, the premium-and-above brands in the spirits segment globally grew by 3.1% or 4.4million nine litre cases (IWSR Global Trends Report 2017). Almost all markets are experiencing this trend and it has led to the growth and proliferation of imported and craft brands in many drinks categories, although perhaps most notably in gin and beer. It has also given greater exposure to lesser-known premium spirits such as Japanese Whisky and Mezcal, which have been growing strongly from a small base. Meanwhile those categories and products perceived as mainstream or lower-quality have generally been struggling. This trend is already fairly well developed in Germany, France, Italy, the UK, Spain, Ireland, Denmark and The Netherlands, and is also gaining traction in markets like Portugal, Poland and the Czech Republic, where it is expected to continue developing in future. (source: IWSR Global Trends Report, 2017)

Within the Gin & Genever category there is double digit growth predicted for the premium and above categories (see Figure 9) equating to a total of 7.687k nine litre cases.



	2016	2021	CAGR 2016-'21
Total	60,999	67,746	2.1%
- Ultra-Premium	0	1	21.3%
- Super-Premium	2,106	4,192	14.8%
- Premium	6,354	10,226	10.0%
- Standard	14,433	16,158	2.3%
- Value	12,491	11,430	-1.8%
- Low-Price	25,616	25,740	0.1%

Figure 9. Gin & Genever: Growth by Quality 2016- forecast 2021

As forefather of the Gin category and an increasing amount of high quality brands and products in the premium-and-above segment Genever has good chances to be named with Japanese Whisky or Mezcal as slow, but steadily rising stars, creating new category recognition and diversity within their categories.

Genever promotion in the United States

A selection of genever producers from The Netherlands are currently involved in a promotion project for promotion of European Genever in the US, *Promoting European genever in the United States* (AGRI-SIMPLE-2017 (SIMPLE-04-2017; third countries), supported by a €1.5 million subsidy with an overall budget of €1.9 million. This project consists of several promotion activities and is aimed at the growing the European export market for Genever towards the United States. The start of this project has led to another unique collaboration of genever producers that is now expanding into a boundary crossing European collaboration, as more producers feel the need to promote European genever as a product of quality, taste, diversity and tradition.

To create sustainable growth as export products in an increasingly complex and difficult time for international trade it is essential to build a solid and healthy base for the category within its home markets and the EU.

There are increasing numbers of genever producers from the Lowlands (The Netherlands and Belgium) who can secure the traditional production of genever and the quality, taste, diversity and rich tradition of this unique European spirit throughout Europe.

Trend summary

All these trends point to a large market potential for Genever: a high quality spirit with rich taste, diversity, and traditional production methods made in micro distilleries in Europe. At the moment, Genever represents only a very small market share of spirits within the EU, and has been largely driven by the efforts of entrepreneurial smaller brands and producers. However, with the execution of this promotional project, where the whole sector will work together to expand this dynamic category, it is expected that Genever will substantially increase its market share of spirits.

The emergence of craft spirits and re-emergence of cocktail culture in Europe means that it is a fantastic opportunity for genever to also emerge again. Traditionally known as a 'the spirit of the low lands', the diversity in style and regional styles shows that Genever is truly a stand-alone spirits category. Premium spirits have seen significant growth in Europe to date as it continues to gain and maintain interest from the bar community in the top mixology countries (United Kingdom, Germany, and the Netherlands). This combined with an increased interest in crafted small batch distilleries globally, means that the potential of Genever throughout Europe is more attractive than ever before.

2.3 Market structure in targeted area

Within Europe there is a free-trade agreement, meaning that producers can export, distribute, and sell to all EU countries from their own organisation. However, it is common within the spirits market that brands and producers work with a registered importer who takes care of the main distribution channels. Every producer is free to choose their own importer - if they choose to work with an importer.

Even between producers participating in this project the approach is different per country. Most brands work with an importer connected to a single country, though the smaller brands also deliver directly from their own distillery to retailers and cocktail bars in certain countries. We therefore want to continue this way of working with a free choice of import strategy, depending on the brand and country.

In the Scandinavian countries Sweden, Norway and Finland there is a state monopoly. This means spirits can only be imported when they have gone through a tender system, where the winner gets purchased by the state owned monopoly.

2.4 Position of genever in the market

Most Genever producers have made their products available in one or more European countries. The UK, Italy, and Germany being the countries with the largest concentration of brands. Though available in many countries, most producers have yet to experience large sales volumes. Because Genever is not yet considered a separate category in most countries, but considered and reported amongst gin, the spirit is still relatively unknown. To put more focus on promoting Genever as a category, a collective of Dutch and Belgian brands have worked together on some of the largest European trade fairs. On both Bar Convent Berlin (Germany) and Venuez (Belgium) they were present with a 'Genever District', combining forces as one collection of Genever distillers. The experience here has led to the notion that we need to act now as a category promoting Genever.

2.5 Position in comparison to non-EU competitors

Since 2008, genever has a *Protected Geographical Indication* status ("PGI status"). Genever is a regional product that may only be produced in The Netherlands, Belgium and small parts of France and Germany.

This is one of the three European Union schemes of geographical indication and traditional specialties, to promote and protect names of quality agricultural products and foodstuffs. Through the logos, consumers can easily recognize these traditional quality products and can rely on their authenticity in terms of regional origin or traditional production.

Figure 10. PGI logo

Registration under these schemes provides producers with the ultimate marketing tool within the European Union, proving genever to be a product of quality, taste, diversity and traditions. Having a PGI-status is what urges the need for a European Union promotional project for European genever.

Aside from the promotion opportunity, this registration provides producers with legal protection against imitation or misuse of the product name.

Main competitors

Genever is a stand-alone category that has to compete head to head with gin, but represents much more diversity in both style and ingredients. It can be closely compared to the recent rise of the spirit gin that was introduced in Europe centuries ago and competed with genever, which was back then a much larger segment than gin. Over the years gin has taken over genever, mainly caused by the lack of promotion of genever.

Genever, as predecessor to the London dry style of gin, is a spirit that has characteristics that resemble both whisky (from the malt content) and gin (from the use of juniper in distillation). It is a very complex spirit, with flavour profiles ranging from dry, botanical gin like flavours through to aged whisky style varieties. The main competitor from a historic point of view is gin and most bartenders who learn about and try genever are recruited from the gin category. Another key competitor is whisky, coming from a flavour point of view. Our strategy therefore focuses on both gin and whisky consumers.

2.6 Challenges

Challenges for genever in Europe are:

- **Category:** In many countries outside of the Lowlands (The Netherlands and Belgium) Genever is not established as a separate category. It is commonly seen as 'a style of gin', rather than the rich and unique product it is. This means that genever is one of the many distilled spirits and cannot accentuate its unique, European and historical character.

- **Image of genever:** Within the Lowlands, genever is a separate category, yet it deals with a negative perceptions. Known as a spirit for elderly people, too strong to enjoy for its flavour and cheaply priced liquor, Genever is not something most people would consider hip. Genever is becoming more appreciated, and there is a new generation emerging that are beginning to see genever as the premium, flavourful, and diverse spirit that it is.

- **Size and complexity of region:** The EU consists of 28 member states with each having their own rules and languages – and each with a differing level of potential for the Genever. There is however a clear vision on countries that have the most potential and these are the hosts of influential international events, bringing bartenders from different countries together, where the culture and language barrier is easily overcome;

- **Drinking habits in different regions:** Different cultures within the key regions have different drinking habits. This makes it a challenge to set out one specific drinking strategy, which is crucial for the promotion of any spirit. Genever, being a qualitative spirit with great diversity, can be used to unlock different drinking strategies and occasions, being the ultimate spirit to promote throughout these different cultures.

2.7 Marketing strategies

The biggest challenge that genever faces is the lack of knowledge, and awareness of the genever category. As such, a focus around education and training through high profile category ambassadors will be the focus of the activity, while attendance at the largest, most impactful trade and bartender facing events will also be a way to create awareness in the market. The purpose of the program is to make the industry more aware of the quality, taste, diversity and tradition of genever.

To communicate this key message, the following set of complementary activities will be executed:

1. Media campaign
2. Trade fairs
3. Category activations
4. Tasting promotion kit

Growth potential genever in EU, compared to Mezcal

The introduction of Genever in the gin market can be compared to the introduction of Mezcal into the tequila market, where both spirits currently see growth. Globally, Mezcal has had the same image as tequila, but is now displaying a more earthy, regional, and interesting take on the adjacent category. Mezcal has put in a lot of effort to set the spirit aside from tequila, emphasizing a more unique and rich character than its bigger brother tequila. An effort shared by all Mezcal producers throughout the regions in Mexico where it's allowed to produce Mezcal. Like Genever, Mezcal can't be made just anywhere.

Mezcal continues to see strong growth in Europe from a very small base, with volumes increasing by 30.9% last year. Developments tend to be weighted towards the premium end. The most important market for the category is Spain, where a number of specialist mezcal bars, or *mezcalerías* have even started to appear in the large cities of Madrid and Barcelona. Interest is also growing in France and the UK as consumers look for unique products with clear provenance. Consequently, the range of brands on offer continues to expand. Mezcal is also gaining traction to a lesser extent in Germany, Italy, the Netherlands and Sweden. (Source: IWSR Global Trends Report 2017).

While still relatively small outside of Mexico, mezcal has been expanding quickly in North America, Key Europe, Latin America and Australasia as bartenders and consumers alike are drawn to its unique smoky flavour, craft personality and premium focus. Consequently, overall volumes increased by 8.7% last year to reach a total of 640,000 nine-litre cases. (Source: IWSR Global Trends Report 2017).

As we now see an increasing consumption of Mezcal and tequila in the key countries in the EU spirits market, there is also scope to see both gin and Genever growth in Europe in years to come. See Figure 11 to Figure 15 (Source: Global Data Country Profile Spirits, 2017). The available data from the UK and Spain (Figure 16 and Figure 17) offer an insight in the breakdown of mezcal and tequila,

emphasizing that Mezcal has seen considerable growth in 2010-2016. (Source: IWSR Domestic Volume Report 2016). This is an indication for the growth potential genever can strive for.

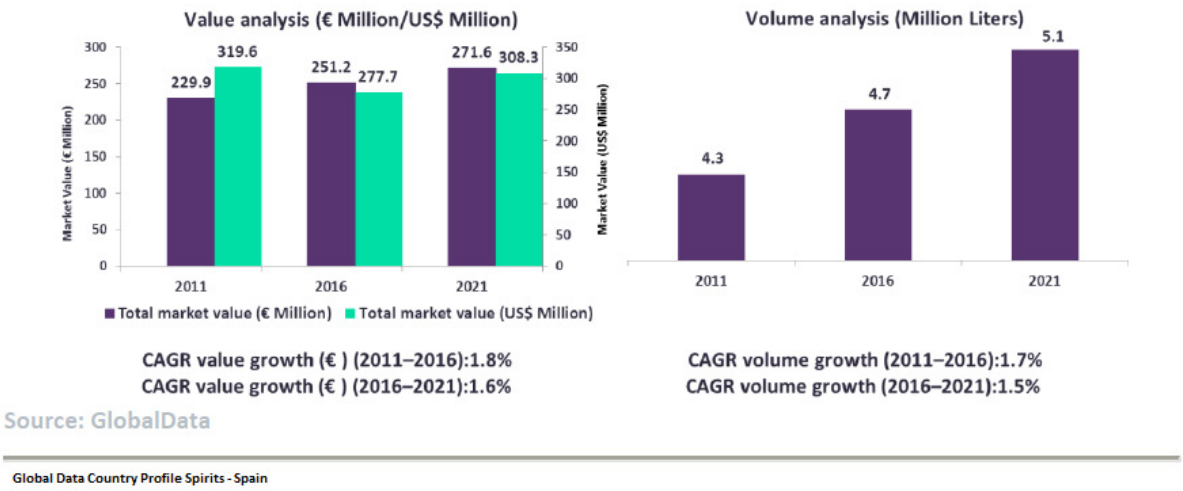


Figure 11. Spain: Value and volume growth analysis, Tequila & Mezcal market, 2011-2021

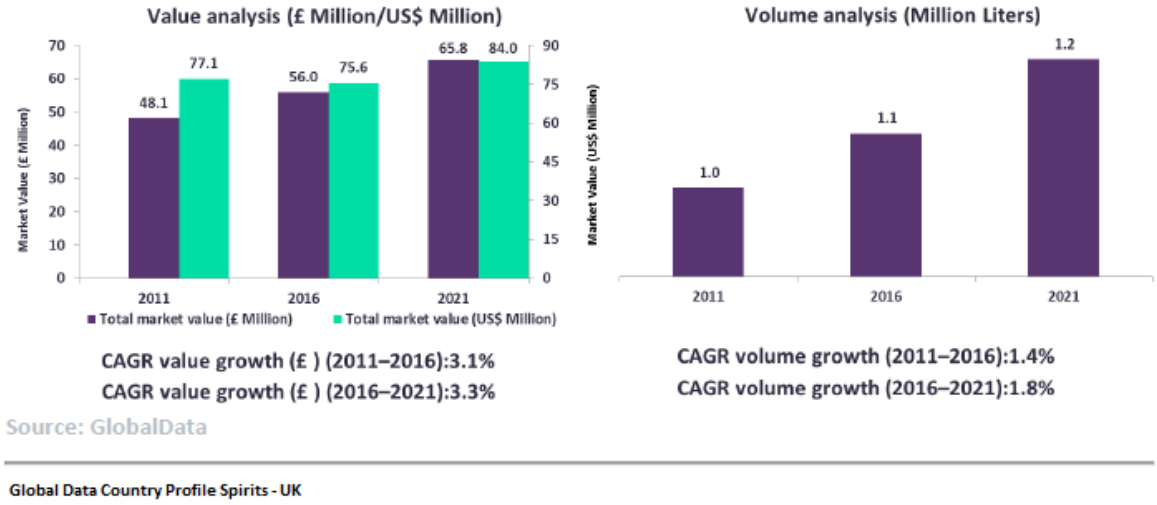


Figure 12. UK: Value and volume growth analysis, Tequila & Mezcal market, 2011-2021

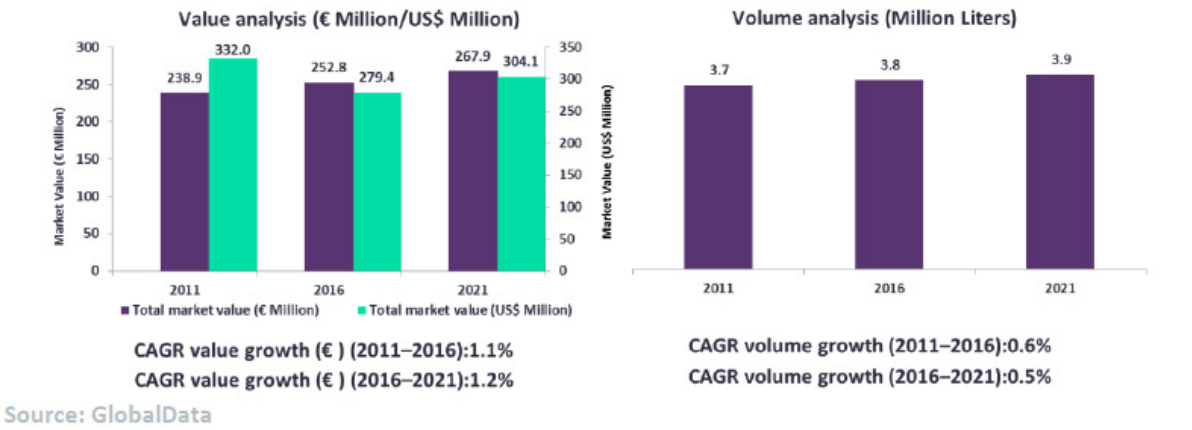


Figure 13. Germany: Value and volume growth analysis, Tequila & Mezcal market, 2011-2021

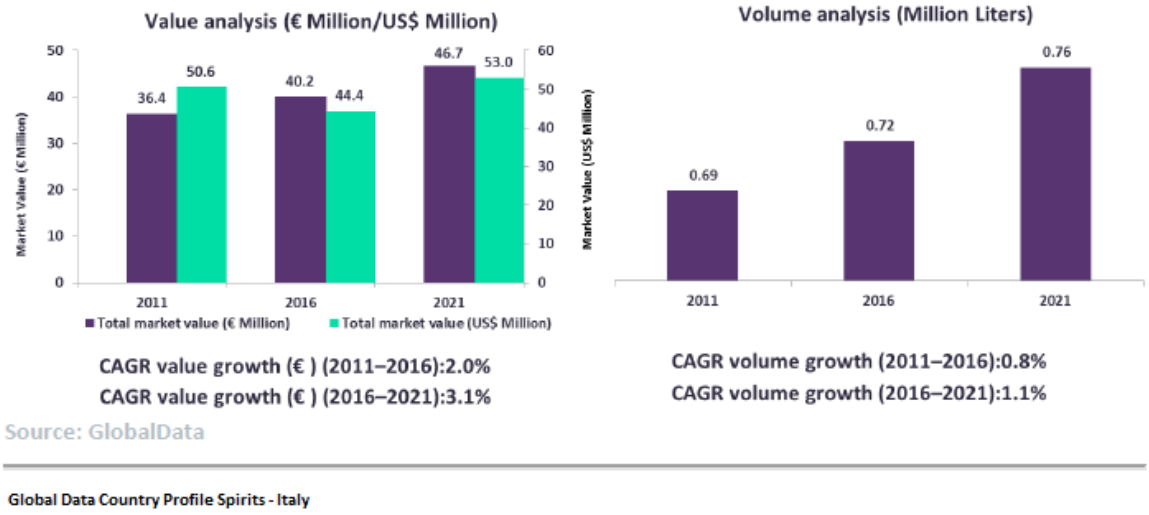


Figure 14. Italy: Value and volume growth analysis, Tequila & Mezcal market, 2011-2021

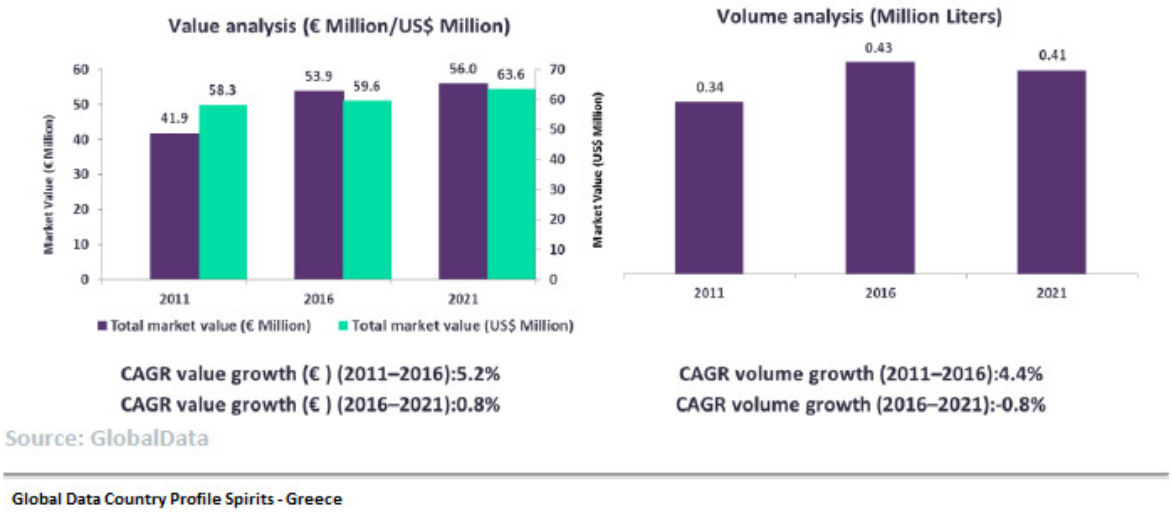


Figure 15 Greece: Value and volume growth analysis, Tequila & Mezcal market, 2011-2021

Tequila	**119.00**	**153.50**	**146.75**	**142.75**	**148.50**	**155.50**	**160.75**	**3.0%**	**0.3%**	**4.7%**
- White Tequila	52.25	58.00	55.25	54.00	50.75	52.50	54.00	0.1%	-2.5%	3.4%
- Gold Tequila	66.75	90.25	85.50	82.25	89.75	93.00	95.75	3.8%	0.8%	3.6%
- Mezcal	-	5.25	6.00	6.50	8.00	10.00	11.00	Nil	17.5%	25.0%

Figure 16. Spain: data on volume tequila and mezcal, Source: IWSR Domestic Volume Report 2016

Tequila	**114.50**	**170.00**	**175.50**	**198.25**	**209.75**	**223.00**	**242.00**	**7.7%**	**7.0%**	**6.3%**
- White Tequila	46.25	78.50	83.40	95.10	102.00	106.50	116.25	9.7%	7.9%	4.4%
- Gold Tequila	67.75	90.50	90.60	100.90	105.00	113.00	121.25	5.8%	5.7%	7.6%
- Mezcal	0.50	1.00	1.50	2.25	2.75	3.50	4.50	24.1%	36.8%	27.3%

Figure 17. UK: data on volume tequila and mezcal, Source: IWSR Domestic Volume Report 2016

Target market: high end on-trade bartenders

The focus will be on the EU cocktail market. With the size and scale of the market, key regions have been chosen, as the European genever producers agree that these present as the most influential areas in the EU. The focus and key performance indicator will be the number of high end bars listing genever in the menus and cocktail menus. All focus will be on penetrating the market by educating bartenders (via presence at key events) about the genever category.

As seen in Figure 18 *Opportunities in the Western Europe Spirits Sector* on-trade is the highest distribution channel next to Hypermarkets & Supermarkets and Food & Drinks Specialists, particularly for Gin & Genever where consumption is above average (41.2%) in on-trade compared to the global on trade consumption (27.3%). On-trade is the term used for the sector of the market in alcoholic drinks comprising sales for consumption on licensed premises.

		Off-Trade					On-Trade
		Hypermarkets & Supermarkets	Food & Drinks Specialists	Convenience Stores	E-retailers	Others*	
Global & Western Europe	Global	36.4%	32.6%	1.0%	0.9%	3.0%	26.2%
	Western Europe	30.2%	31.1%	1.6%	2.6%	6.0%	28.5%
High Potential Countries	UK	31.6%	26.0%	4.9%	1.6%	6.0%	29.9%
	Netherland	30.4%	22.4%	4.5%	2.6%	4.5%	35.5%
	Germany	36.5%	33.7%	N/A	2.5%	4.1%	23.3%
	France	24.7%	38.9%	1.0%	1.7%	1.9%	31.7%

Figure 18. Global Data: Opportunities in the western Europe spirits sector: Leading distribution channels by countries, 2016 p.59

Identifying the on-trade as a great opportunity for Genever, we will focus on a sub category within on-trade that reflects on trends as premiumization, craft and heritage: the high end on-trade and particularly the bartenders working within it.

Gin & Genever						
Global	41.3%	21.7%	3.9%	1.8%	3.9%	27.3%
Western Europe	25.3%	22.2%	2.2%	2.9%	6.2%	41.2%
UK	32.4%	22.2%	5.1%	2.2%	6.8%	31.4%
Netherland	23.1%	15.7%	4.5%	2.7%	3.6%	50.5%
Germany	37.2%	33.8%	NA	2.3%	3.5%	23.3%
France	21.7%	37.4%	1.4%	2.4%	4.0%	33.1%

Figure 19. Global Data: Opportunities in the western Europe spirits sector: Leading distribution channels in the Western European region by markets, 2016 p.60

See chapter 2.11 Target group characteristics, demography, socio-professional profiles, typology for a more specific target group profile.

Home market: retailer approach

Within the Lowlands region, most genever distillers are well represented in cocktail bars. Genever as a category is already established. Therefore in the home countries of European genever, there will be an additional focus on retailers. The approach of retailers would be the next step to take in the rest of Europe, as follow-up of this promotion project. The 'home market' is the demonstration market for this retailers approach.

Target area: gin/whisky countries and bartender hubs

To make the most impact with this promotional project, the key countries are selected based on:

- Current set-up of distribution channels where at least one or more members of the trade organizations have distribution set-up for proper follow-up of the category promotion.
- Gin and/or whisky consumption should be above average, as we consider this the two best segments from which genever can recruit consumers.

Within the selected key countries the focus will be on influential cities within these countries. These cities will be chosen based on the presence of influential trade fairs and high-end bartenders and cocktail bars.

Certain trade fairs are seen as the main inspiration and network hubs for high end bartenders from different countries in the EU. Making an impact on these events and the cities they are being held in, has more impact than targeting bartenders one by one in their home country. Some countries will not be key countries for the promotion of genever, but will have very interesting trade shows that should be attended. These cities will be selected as secondary within this project.

Category Summary – Gin/Genever

Leading Markets

	Market	2009	2014	F 2020	Mkt Share 2014	Mkt Share F 2020	CAGR 09 to 2014	CAGR 14 to F 2020	Vol Chg 14 to F 2020
	World Total	52,695.5	49,211.8	48,989.5	100.0%	100.0%	-1.4%	-0.1%	-222.2
1.	Philippines	18,076.0	13,869.3	11,105.5	28.2%	22.7%	-5.2%	-3.6%	-2,763.8
2.	United States	10,982.3	10,095.0	9,761.0	20.5%	19.9%	-1.7%	-0.6%	-334.0
3.	Spain	3,050.8	3,906.8	4,813.8	7.9%	9.8%	5.1%	3.5%	907.0
4.	United Kingdom	2,666.0	2,995.8	3,441.3	6.1%	7.0%	2.4%	2.3%	445.5
5.	India	4,375.0	3,568.5	2,747.0	7.3%	5.6%	-4.0%	-4.3%	-821.5
6.	Duty Free*	866.0	1,119.8	1,394.7	2.3%	2.8%	5.3%	3.7%	274.9
7.	Netherlands	1,823.3	1,385.5	1,373.0	2.8%	2.8%	-5.3%	-0.2%	-12.5
8.	Germany	891.8	1,006.5	1,195.0	2.0%	2.4%	2.5%	2.9%	188.5
9.	Kenya*	43.3	554.8	859.8	1.1%	1.8%	66.6%	7.6%	305.0
10.	Canada	725.3	771.0	796.0	1.6%	1.6%	1.2%	0.5%	25.0
11.	Slovakia	870.3	740.0	760.3	1.5%	1.6%	-3.2%	0.5%	20.2
12.	Belgium & Luxembourg	589.8	721.5	712.5	1.5%	1.5%	4.1%	-0.2%	-9.0
13.	South Africa	598.8	564.8	621.0	1.1%	1.3%	-1.2%	1.6%	56.3
14.	Uganda*	327.3	467.8	575.3	1.0%	1.2%	7.4%	3.5%	107.5
15.	Italy	513.3	475.5	573.3	1.0%	1.2%	-1.5%	3.2%	97.7
16.	France	527.5	481.8	524.0	1.0%	1.1%	-1.6%	1.4%	42.3
17.	Japan	443.0	462.5	464.5	0.9%	0.9%	0.9%	0.1%	2.0
18.	Portugal	86.8	180.8	385.8	0.4%	0.8%	15.8%	13.5%	205.0
19.	Australia	256.0	294.8	365.5	0.6%	0.7%	2.9%	3.7%	70.7
20.	Turkey	150.5	200.3	271.5	0.4%	0.6%	5.9%	5.3%	71.2
21.	Greece	318.5	249.5	256.5	0.5%	0.5%	-4.8%	0.5%	7.0
22.	Venezuela	258.0	215.0	230.5	0.4%	0.5%	-3.6%	1.2%	15.5
23.	Canary Islands	102.8	117.8	198.5	0.2%	0.4%	2.8%	9.1%	80.7
24.	Argentina	255.0	228.8	188.0	0.5%	0.4%	-2.1%	-3.2%	-40.8
25.	Sweden	161.0	164.0	181.8	0.3%	0.4%	0.4%	1.7%	17.7

Source: IWSR Calculations
** Straight-line forecast market*
All volume figures in '000s nine-litre cases

Figure 20. Worldwide countries with highest gin/genever consumption. The combination between hogh conspumption and a basic distribution network are interesting countries for the promotion project.

As shown in Figure 20, the leading European markets for gin/genever are:

- **Spain**
- **United Kingdom**
- *Netherlands* (home country and already quite aware on genever, therefor 'secondary country')
- **Germany**
- Slovakia (no good distribution network, therefore not a target country)
- *Belgium* and Luxembourg (home country and already quite aware on genever, therefor 'secondary country')
- **Italy**
- France (no good distribution network, therefore not a target country)
- *Portugal* (no good distribution network, however a very interesting trade fair in Lisbon, therefor 'secondary country')
- **Greece**
- *Czech Republic* (not in this graph, but has an interesting trade fair in Prague, therefore a 'secondary country')

Key countries and most relevant events:

- Spain (Alimentaria Barcelona, Madrid)
- United Kingdom (Imbibe, Cocktails in the city, Tales Of The Cocktail on tour)
- Germany (BCB, Hanse Spirit)
- Italy (Gin Day Milan)
- Greece (Athens Bar Show)

Secondary countries with influential events:

- The Netherlands (Genever Day Lowlands)

- Belgium (Genever Day Lowlands)
- Portugal (Lisbon Bar Show)
- Czech Republic (Prague Bar Show)

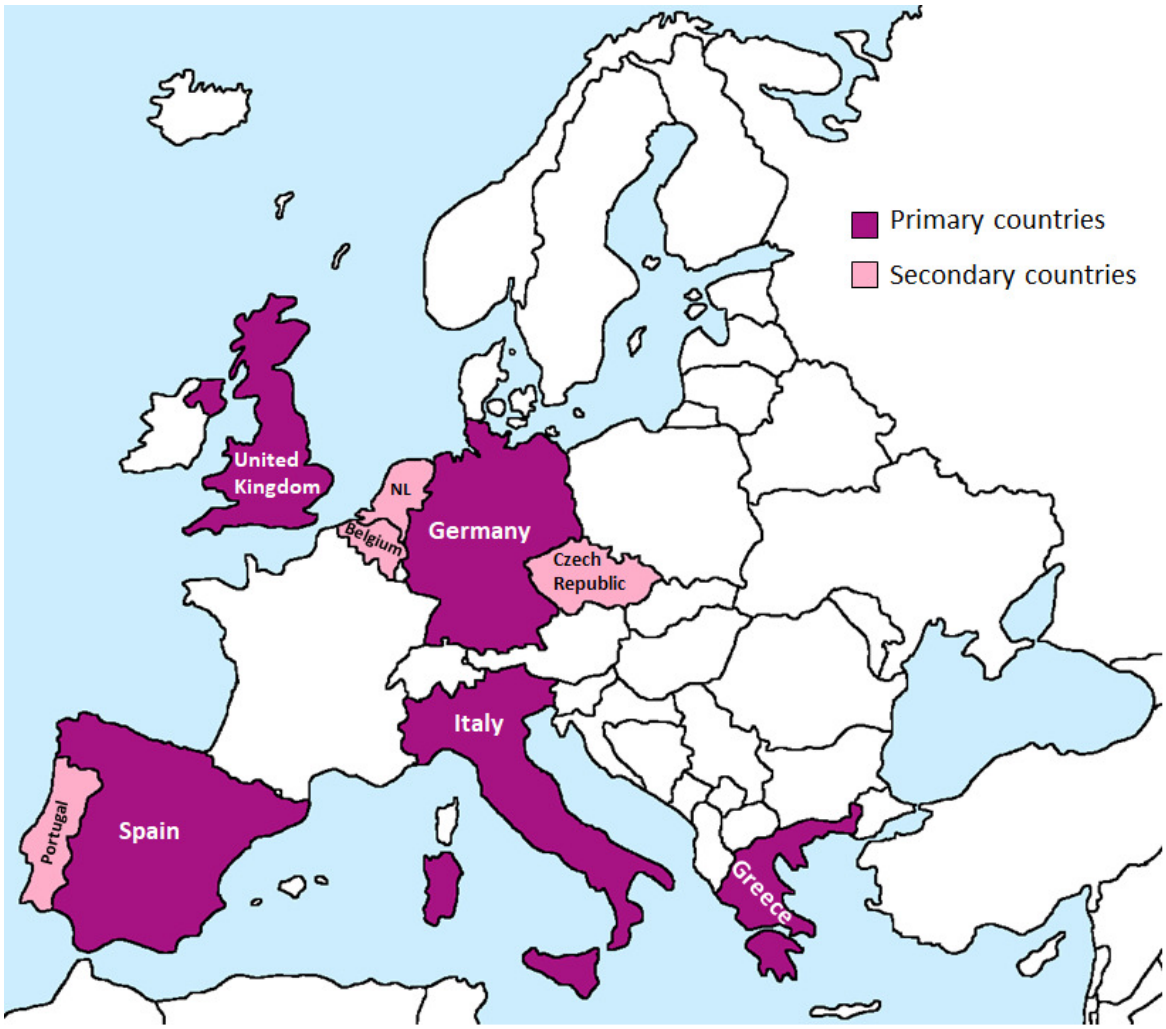


Figure 21. Overview of the primary and secondary countries that this promotion project will focus on.

2.8 Competitive advantages of your proposing organization

For the subsidy proposal both Spirits NL (spirits trade organization The Netherlands) and Vinum Et Spiritus (wine and spirits trade organization Belgium) will work together. They represent the main players in the world-wide market of genever and are the designated organizations to promote genever throughout Europe. The members of Spirits NL and Vinum Et Spiritus are actively involved in the design and implementation of the project.

2.9 Key differences and competitive advantages

As mentioned, genever will compete directly with gin and whisky, which is largely and broadly available. The key differences that will make genever more competitive than gin are the European values:

- **Quality:** The types of Genever that will be introduced throughout Europe are all high quality products, small batch, and in most cases handmade products, whereas in the current market

for domestic gin there is a range of low quality blended products, which in many cases are not even distilled and are instead blended with flavours;

- **History:** Genever has a very long and rich history. As bartenders continue to be inspired by the variety and story of the popular gin category, they will automatically come to the 'grandfather of gin': genever. When the English tried to replicate the production process of genever, they were not able to do so because they were unable to replicate the complex distillation process of malt spirit. They therefore decided to use a less complex base ingredient and simplify the ingredients included during the distillation process, resulting in the creation of gin.
- **Tradition:** Genever has a strong tradition, both in Europe and the rest of the world. Companies that produce Genever are often family business dating back hundreds of years, still using old family recipes. Before Prohibition (in 1880) it was the most consumed spirit in the United States and eight times larger than gin. With an increased desire from bartenders to look back at traditional cocktails, and be inspired by historical drinks, bartenders will discover the drink of their ancestors: Genever;
- **Craft/Artisan:** The diversity and relative small scale of Genever producers is likely to play well with both consumers and bartenders in Europe, who favour regional, small batch, and unique or distinct products;
- **Classic Cocktails:** Genever is likely to have been used widely in the early emergence of cocktail culture, most likely in all early gin recipes it was in fact "Dutch gin" or Genever that was used. With the increasing trend and resurgence of classic cocktails (largely gin or whisky based) Genever is more relevant than ever;
- **Taste:** Genever has a more intense, crafted taste. Genever contains malt spirit with a distinct flavour of grain, ranging from 1,5%-14,9% (New-Style or 'Jonge') to 15% or more (Old-Style or Oude), even up to 100% malt. That makes the flavour and versatility much stronger. Gin contains a neutral spirit, and is less dynamic in its versatility than gin. Genever typically has a lower final alcohol content, a minimum of 1,5% for New-Style and a minimum of 35% for Old-Style. This gives genever, in comparison to gin, a very different and more complex taste profile;
- **Diversity:** Genever as a category is diverse, with offerings botanical and juniper rich like Genever, ranging through to aged whisky like products. Young genever, grain genever, spelt genever, rye genever, old genever, malt spirit genever and cask finishes, aged propositions are just some examples of different kinds of Genever.

2.10 Challenges on the logistics side: main distribution channels

As mentioned producers aren't bound to work with importers, distributors or sales agencies. The only challenge that might arise is that the label design might have to be different by country, as each country has specific laws regarding obligatory labelling information. Most producers are known with these requirements, so this seems like an obstacle easily overcome.

2.11 Target group: characteristics, demography, socio-professional profiles, typology

This promotion project focuses on targeting high-end bartenders who will be educated to serve, recommend, and become ambassadors for the genever category, making sure that the story, and products are passed on to their customers; the consumers. Making them aware of European Genever and getting them to list it on their bar menu will be realized by educating them in the key message of the promotional campaign. In addition we focus on trade media and trade press, as they have a large influence on the above mentioned target group and can be of great value to this project. By communicating through trade press we will make the general impact of promoting European Genever greater. We can break down the target group in three focus groups:

1. ***Super Premium***: Highly educated bartenders with a profound cocktail knowledge and who are already familiar with the category from old cocktail recipes from the history of gin and genever. They have a large bartender network on and offline and they are trendsetters and influencers in the bartending industry. They are frequently targeted by brands and often participate in brand and category initiatives in the spirits industry as speakers, guest bartenders, etc. As a result, they are more difficult to win over, in order to do so we need to get them engaged and excited about the revival of genever. Can be found in award winning bars, trade shows and industry get-togethers, and they or their bars are known in the international bartending scene. Their menus will be tailor made (experimental or classic) and their portfolio will be very high quality with higher priced drinks.
2. ***Premium***: Bartenders who are aiming to work in a leading cocktail bar. They are ambitious, active, and know about the bigger categories as well as some better known smaller ones such as mezcal, soju, etc. and but may not be able to differentiate between the more niche categories. They will be easier to target than Super Premium as they are not receiving as much attention from other brands, and they still have the aim to learn.
3. ***Media (trade press):*** Cocktail writers, bloggers, authors, super premium bartenders, World's 50 Best Bar owners, Tales of the Cocktail award winners. All the influencers can be incorporated into all aspects of campaign (media campaign, trade shows, category ambassador program, and study tours). Cocktail writers, bloggers, authors, classic trade media, local but influential news outlets, titles, online, digital, social media, business, lifestyle, To be targeted for media campaign and trade shows, locals can also be targeting to Category Ambassador program and events.

2.12 Consumption trends in the medium term

The following consumption trends in the medium term are important for the promotion of European genever throughout Europe:

- An emergence and interest in classic cocktails, and trends towards more cocktail experimentation is a developing movement in the market;
- Launching of small batch micro-distilleries, has become more and more prevalent evidencing the large demand from European consumers for more regional, crafted artisan spirits products;
- Premium spirits have seen significant growth in Europe to date, and it continues in top mixology countries especially (United Kingdom, Germany, and the Netherlands) who see sustained interest from the bar community in;
- Generally speaking, consumers across all food and drinks categories are searching for authenticity in their consumption. Authentic ingredients and processes are of increasing importance to consumers.

2.13 Current state of bartender awareness

As Genever is not yet seen as a separate category, most bartenders can't tell the difference between Genever and gin. However, our focus target group consists of high end bartenders, true craftsmen, who will have learned about Genever through the role the spirit played in early cocktail history. Therefore, awareness of the product is there but needs to be developed further. However, there seems to be a lack of deeper category insights and the diversity it has to offer, as well as how it can be incorporated in drinks and menus nowadays.

In 2012, spirits connoisseur Mark Ridgewell brought Genever out of the shadows once again with a simple observation: he claimed that genever fills the gap between whiskey and gin. "*Whiskey is heavy and complex; gin floral and full of botanicals. Genever – through playing with the maturation*

process, the addition of more or less malt spirit, and the use of more or fewer botanicals – can move effortlessly move between the two extremes.” [1]

Cocktail historian David Wondrich proposed in his book on classic cocktail culture, that many of the classic gin cocktails becoming popular among a new wave of bartenders were likely to have been made with genever; “Genever has been rediscovered in pockets and there’s cautious talk that the Dutch spirit could be making a comeback.”[2]

> “Jenever is the Dutch ancestor of gin. It has the complexity of a brown spirit and the mixability of a white one, and should, in my opinion, be used much more often.”[3]

2.14 Challenges on awareness

- Explaining what genever is (malt spirit, juniper berries, botanicals, aged or unaged);
- Showing the rich diversity of genever;
- Education on how to use genever;
- Showcasing tradition, craft and quality of genever;
- Describing the different flavour profiles of genever, in particular compared to gin and whisky

2.15 SWOT analysis

STRENGHTS	OPPORTUNITIES
• Protection Geographical Indication • High quality product • Craft production process, artisanal product • Full of history, ‘grandfather of gin’ • Great tradition • Diverse category (from Gin to Whisky) • Versatility in use (from neat sampling to cocktails) • Intense, crafted taste • Experience with a European category approach in the US	• Popular gin and whisky market, need for high quality products growing • Increasing desire from bartenders to look back at traditional cocktails and historical drinks • Bartenders desire to explore with unique, different tastes and flavours • Consumers always looking for new, better products • Consumer trends towards transparency and artisanal products • Involvement both Dutch and Belgian producers, as well as smaller brands, with a willingness to cooperate and put joined efforts in pushing the category together • Resurgence of classic cocktails • Trade fair approach reaches all relevant bartenders at once, very effective
WEAKNESSES	THREATS
• Low awareness of genever as a category • Small size / market share of spirits (0,17% of gin/genever market) • Complex category	• Large marketing investment from established categories (competitors) • Availability and competitive pricing difficult for small genever producers • 28 member states that all have their own rules and languages

Figure 22. SWOT analysis for the promotion of genever in the EU

[1] Spirits explained by Mark Ridgwell of taste and flavor limited, 2012
[2] Drinks International, Unearthing the past, February 2018
[3] Nico, bartender Hotel Rivington & Sons, Zurich, 2015

2.16 Relation to genever promotion in the United States

A selection of Genever producers from The Netherlands and Belgium are currently involved in a promotion project of European Genever in the United States. This project consists of several promotional activities and is aimed at the growth of the European export market.

The start of this project has led to a unique collaboration of Genever producers that is now expanding into a boundary crossing European collaboration, as more producers feel the need to promote European Genever as a product of quality, taste, diversity and tradition.

Promoting genever in the United States is one thing, but this product needs to have a steady sales volume in its home market as well: Europe. The United States is a large market, where the Genever sales will steadily, but slowly rise, aiming for a long-term result. In Europe the ambition is to set a more short-term result, though containing the same sustainability. The overall spectrum isn't as wide and focusing on key regions without complicated regulations and distributor contracts, can result in a quick realization of growth. With the market share of genever declining worldwide, it is necessary to act as a category within Europe and promote European Genever to increase sales volume as well as market share.

With the increase of volume and market share, Genever producers from the The Netherlands, Belgium and the PGI-defined parts of France and Germany, can ensure the traditional production of Genever and the quality, taste, diversity and rich tradition of this unique European spirit throughout Europe.

2.17 Overall conclusions

- Genever has a rich history within the EU, the potential for an expansion to the complete European market is very attractive;
- Consumer trends make it the right time for Genever to rise up, with the emergence of craft spirits and re-emergence of cocktail culture, demand for high quality products, demand for more transparency in food and drink production, significant shift toward 'real' products with history and tradition;
- Genever can be considered the grandfather of gin (which is very popular), thus professional bartenders who dive deeper into the brief history of gin soon discover the rich history of Genever;
- Genever bridges the gap between both transparent spirits, such as vodka and gin, and aged spirits, such as cognac and whisky, making it very diverse;
- The market structure in Europe demands for co-operation when smaller categories are concerned thus a promotional project for Genever, supported by an EU subsidy, is essential;
- The EU scheme PGI Scheme acknowledges that Genever has its own unique character;
- A promotional project in Europe needs to focus on a few key regions, for this project these are the cities mentioned at 1.6 Marketing Strategies;
- Genever consumers are rich, young, and innovative high-end cocktail drinkers which are influenced directly by bartenders.

3. ACTION OBJECTIVES

The promotional campaign will focus on the high-end spirits market in Europe. The market analysis in the previous chapter has shown us the following about the spirits market:

1. The emergence of craft spirits and re-emergence of cocktail culture in Europe means that it is a fantastic opportunity for genever to also emerge. Traditionally known as a 'the spirit of the low lands', the diversity in style and regional styles shows that genever is truly a stand-alone spirits category.
2. An increased interest in crafted small batch distilleries globally showcases that the potential of genever throughout Europe is more attractive than ever before.
3. Premium spirits have seen significant growth in Europe to date, and is predicted to see some more interest from the bar community, as it continues to in top mixology countries (United Kingdom, Germany, and the Netherlands).
4. Bartenders have heard about European Genever, but don't know that it has;
    a. Rich story (history in European culture)
    b. Premium quality, crafted processes
    c. Versatility in flavour and of drinking serves and occasions
5. The best way to make an impact is to focus on trade fairs where we can reach high-end, influential bartenders at the same time and follow-up from there.

Based on this knowledge, the strategy of the promotion campaign will be: Build awareness for the genever category as a cocktail ingredient in Europe by educating bartenders on the versatility in flavour, divers drinking strategies, high quality and history of European Genever.

This strategy can be translated into two main objective categories; awareness objectives and economic objectives. These objectives are described in detail in the next paragraphs. The methods for measuring whether the objectives are met are described in section 7 of this document.

3.1 Awareness objectives

The awareness objective of the promotion campaign is to increase the **awareness** of European Genever among **bartenders** by educating them on the rich history and high quality of European Genever. This awareness objective can be broken down into two measurable objectives; the number of bartenders made aware of genever and the number of bartenders educated on genever.

As it is difficult to define an exact number of bartenders in Europe, we have consulted a Eurostat report, measuring the number of bars in the key countries in 2010. Based on the experience of the genever producers, the assumption is that there are on average 2.5 bartenders per bar. The total universe of bartenders in the five target counties comes to 1.017.500 (see table below, source: Report by Ernst & Young commissioned by The Brewers of Europe with support from HOTREC, The Hospitality Sector in Europe - An assessment of the economic contribution of the hospitality sector across 31 countries, September 2013).

Country	Number of bars	Number of bartenders
UK	44.000	110.000
Spain	172.000	430.000
Italy	119.000	297.500
Greece	34.000	85.000
Germany	38.000	95.000
Total	***407.000***	***1.017.500***

Figure 23. Number of bartenders in the target region. (assumption: 2,5 bartenders/bar), source: Eurostat 2010

As mostly the bar owners and bartenders that work in the segment of premium plus bars travel to the trade shows and read trade news, we will consider 50% of the total bartender universe as the premium universe, which leaves us with 508.750 bartenders. The proposing organizations have had experience in these targeted countries: the UK, Belgium, Italy and Germany. It is the experience of all the brands that were represented at trade fairs in these countries that only a small group of bartenders is aware of genever and an even smaller group can be considered educated. At trade fairs Imbibe, Boutique Bar Show, Venuez, The Gin Day and Bar Convent Berlin they have spoken directly to several bartenders and only one in twenty bartenders they spoke to, knew that genever was different than gin. Of those bartenders, only one in ten could explain genever as a product, therefore being considered an educated bartender.

This comes down to a baseline definition of:

5% of 508.750 = 25.437 aware bartenders

10% of 25.437 aware bartenders = 2.544 educated bartenders

1. Increase the number of bartenders that are made aware of European Genever

To introduce European Genever to the high-end bartender in Europe, they have to become aware of the existence of the product. This awareness can best be increased through making the bartenders, who are the gatekeepers for cocktail menus, aware of European Genever. As stated the current amount of bartenders that are aware of genever is around 25.500. Based on the activities that will be executed (see work packages in chapter 6) a feasible objective within the promotional project is to make an additional 174.250 bartenders aware of genever during the promotional project.

	Baseline (current situation)	Objective
Europe	25.500 aware bartenders	additional 174.250 aware bartenders

2. Increase the number of bartenders that are educated in European Genever

By educating bartenders in the rich story, protected geographical indication, high quality and versatility of European Genever they will get excited about the world of genever and can credibly recommend genever to end consumers. As stated the current amount of bartenders that are educated on genever is around 2550. Based on the activities that will be executed (see work packages in chapter 6) a feasible objective within the promotional project is to educate an additional 6.325 bartenders on genever during the promotional project.

	Baseline (current situation)	Objective
Europe	2.550 educated bartenders	additional 6.325 educated bartenders

3.2 Economic objectives

The main economic objective of the promotion campaign is to increase the **sales volume** of European Genever in Europe by realising a significant **growth of market share** of European Genever throughout Europe. This economic objective can be broken down into two measurable objectives; the number of listings of European Genever in cocktail bar menus and the sales volume of European Genever throughout Europe.

1. Increase the number of European Genever listings in cocktail bars

In theory, educating bartenders should directly work through to the number of European Genever listings in cocktail bars. When education is done right, bartenders should be excited to start listing European Genever on the menu in the bar they work.

There will however also be other flow on effects. When bartenders are looking for inspiration to improve on the quality of their own bar and bar menus, they will often look at influential bars they respect. For cocktail bars in Europe there are only a small number of influential and reputable bars. While these can change from year to year there are established cocktail cities where the best and most interesting cocktails are made (Tales of the Cocktail's Spirited Awards names the top cocktail bars each year, and the Berlin Bar Convent's Mixology Awards name the best bars of Germany, Austria and Switzerland). A growing awareness of European Genever in these key countries and cities will result in an increase in listings of European Genever in cocktail bars. The number of European Genever listings in cocktail bars can be tracked per cocktail bar. This means that the objective will have a direct effect on the commercial goals of the promotional campaign.

Figure 24 (Current genever consumption in the primary markets) shows that the current sales volume is 139.500 litres. Looking at the consumption pattern of spirits in those same countries, an average of 30% of those sales is done on-trade (41.850 litres). Considering an average sale of 400 litres per outlet per year, we could say that there are around 100 listings in the primary markets. For this promotional project, we will put that down as our estimated baseline, with a definitive baseline researched by the start of the project. These listings have been reached without any promotional effort, so we aim for a sustainable growth of 8 times the amount of current listings to 800 listings within 3 years, so an additional 700 listings.

	Baseline (current situation)	Objective
Europe	100 listings of European Genever	additional 700 listings of European Genever

2. Increase sales volume of European Genever throughout Europe

An increase in the number of European Genever listings in cocktail bars will increase the sales volume of European Genever throughout Europe. More availability in influential cocktail bars means more consumption, as well as related availability in other bars and high end retail. This will result in two effects:

1. Increasing the profit of European Genever producers throughout Europe. This profit allows them to invest more into the European market to further expand their business even more.
2. Reaching higher sales volume will establish the category in the market.

Based on IWSR data the current sales volume of Genever in the five primary countries is equal to 139.500 litres, see Figure 24.

Country	Genever consumption 2014/2015 ('000 9 litre cases)	Genever consumption 2014/2015 (in litre)
Germany	12	108.000
Italy	1	4.500
Spain	2	202.50
UK	1	6.750
Greece	0	0
Total	***16***	***139.500***

Figure 24. Current genever consumption in the primary markets (source: IWSR)

The total sales volume of the combined gin and genever market in these 5 countries is equal to 80.788.500 litres (IWSR). This means that genever only represents 0,17% of the total gin and genever market in these countries.

The total gin and genever market is expected to grow to 90.415.687 litre in the next three years. This is due to the growth in sales of gin. With the help of the promotion project we estimate that the share of genever in the gin and genever market can grow to 0.5% over the next 3 years. This means that in year three we expect to sell a total of 90.415.687*0,5% = **452.078** litres of genever, more than tripling the sales volume. The objective is therefore to increase the sales volume by an additional 452.078 - 139.500 = **312.578 litres**

	Baseline (current situation)	Objective
Europe	A sales volume of 139.500 litres of Genever a year	An additional sales volume of 312.578 litres of European Genever a year

4. ACTION STRATEGY

4.1 Target groups and key message

To reach the action objectives as set out in the previous chapter, the target group on which the strategy will focus is bartenders. Throughout the action strategy we will communicate messages on different levels. Within every means of communication the main focus will be on *European Genever*, promoting the most versatile spirit from Europe. Key values for promoting genever are quality, taste, diversity and tradition. The 7 brands of the proposing organizations will only be communicated in a supporting manner to show and prove the diversity of genever, entailing no more than 5% of the total communication space.

Union message

In the action strategy to support this promotional project, the following union message will be communicated:

Genever: the most versatile spirit from Europe
Promoting Genever in Europe - Genever Traditions Back in the Spotlight

Key messages

Making bartenders aware of European genever and getting them to list it on their bar menu will be realized by educating them in the key messages of the promotional campaign.

- European genever is the most versatile spirit, suitable for a broad range of consumption occasions, with a strong link to classic and modern cocktails because of its added depth of complexity and its similarities to both gin and whisky;
- European genever is made with traditional, craft, artisanal production methods, has a unique high quality taste, and an incredible range of products across its various styles and expressions;
- European genever has a very rich history, with development of the product dating back more than 350 years, and at one time was dominant in the cocktail culture, having the position gin now enjoys;
- Evidencing both the quality and unique character that European provenance gives this product.

4.2 Activities and relation to objectives

1. Media campaign

By having influential, reliable and independent writers and bloggers in the spirits industry write about European genever (its rich story, high quality, versatility and resurgence in the cocktail industry) a general awareness of the category will be created among bartenders. By carefully choosing the writers and bloggers that are seen as reliable by its public (bartenders), this is expected to create a positive effect in the awareness of bartenders. This is considered to be a cost effective way to target bartenders, as opposed to traditional forms of advertisement like television commercials, printed ads or online banners.

2. Trade fairs

The most important awareness activity, expected to have the largest impact, is the participation in trade fairs. European genever will be promoted as a new category at nation-wide and regional spirit

events. At these influential trade fairs, bartenders can directly be made aware of the category by personally telling and showing them everything that is great about European genever.

Key countries and most relevant events:

- Spain (Alimentaria Barcelona, Madrid)
- United Kingdom (Imbibe, Cocktails in the city, Tales Of The Cocktail on tour)
- Germany (BCB, Hanse Spirit)
- Italy (Gin Day Milan)
- Greece (Athens Bar Show)

Secondary countries with influential events:

- The Netherlands (Genever Day Lowlands)
- Belgium (Genever Day Lowlands)
- Portugal (Lisbon Bar Show)
- Czech Republic (Prague Bar Show)

Name	City	Visitors	Information
Bar Convent Berlin	Berlin, Germany	12.000	Visitors from 74 countries, 25% representing (cocktail) bars and 84% focussed on spirits
Venuez	Antwerp, Belgium	7.000	Visitors from over 10 countries, 26% representing (cocktail) bars and 49% focussed on spirits
Imbibe	London, UK	12.000	Visitors of whom 80% focusses on spirits
London Cocktail Week	London, UK	25.000	300 bars joining the program, 100% focussed on spirits
Lisbon Bar Show	Lisbon, Portugal	5.000	Seminars and workshops, suppliers, brands, outlets, bartenders, experts or simply passionate about the industry
Prague Bar Show	Prague, Czech Republic	Hundreds	First bar show in Czech Republic, seminars, workshops, bar and beverage industry professionals
Athens Bar Show	Athens, Greece	8.000	Seminars, case studies, All bar industry professionals such as bartenders, bar managers, F&B managers, entrepreneurs, waiters/waitresses, and assistants, Merchants, distributors, and representatives of companies and brands of the industry.

The Gin Day	Milan, Italy	3.500	Exclusive about gin and genever, seminars and workshops at 'The Gin School'
Alimentaria	Barcelona, Spain	140.000	Visitors from 157 countries, focus on trade (importers, bartenders and retailers)

Figure 25. Overview of trade fairs and key figures per fair

3. Category activations and ambassadors

Five Category Ambassadors (CA's) for genever will be appointed to get in contact with influential bartenders in key countries, mainly through trade fairs, to make appointments for workshops/masterclasses. These influential bartenders will directly be educated by Category Ambassadors visiting them in their own cocktail bars or by giving workshops/masterclasses to small groups of bartenders. The activations will centre on highlighting the diversity and versatility of Genever to bartenders. By personally showcasing this to the bartenders they can directly be influenced and experience all the great possibilities genever has. Besides this, the activations by Category Ambassadors will also be an effective way of building closer relationships with bartenders and create a genever community in Europe.

Influential bartenders will be educated in the rich story and unique production process of genever by attending a study tour (upon invitation from the CA's) where they are invited to The Netherlands and Belgium to visit the birthplace of genever. It is expected that bartenders, after having experienced the story of genever, will be more inclined to list it on their cocktail menu in their bar, resulting in an increased demand for European genever in Europe.

4. Tasting Promotion Kits

Influential bartenders and VIP Media (writers, bloggers, influencers, and press) will be educated in the quality, taste, diversity and tradition of genever by providing them with tasting promotion kits containing one product per participating brand. This showcases not only the richness of the category, but actively stimulates the target group to experience genever first-hand. We will inspire them to sample genever in one of the many ways to consume it. It is expected that by inspiring media and trade press to sample genever, they will write more about it and therefore reach a broader audience of influential bartenders.

4.3 Adaption of strategy to different target markets

The action strategy will be adapted in different target markets with consideration of the complexity of the European market. There are two main challenges regarding the target markets:

1. The language barrier; each country of the five key countries has its own language.
2. Different drinking cultures; even within the cocktail culture, preferences can vary from strong to subtle flavour and from cocktail serve to a neat serve, etc.

The target group of bartenders transcends the differences between the target markets. Both barriers will be overcome by our focus on bartender hubs and bartenders networks. In all activities (trade fairs, media campaign, category activations and ambassadors and tasting promotion kits) we are able to communicate in one main language, English. By our focus on genever being the most versatile spirit from Europe, the diversity is an important part of the strategy. This has as a result that genever can be used in all different drinking cultures, with different ways and moments of consumption.

4.4 Relation to other activities on targeted markets

From both trade organizations we notice that our members are present at several trade fairs and have set up attempts at media campaigns. These individual approaches barely have impact on the large ground there is to cover within the EU. This is the reason The Netherlands has set up a corporation with Belgium to promote genever as a category, using the experience of the members from their current activities in targeted markets. Current activities done by the proposing organizations will be transformed to actions carried out as a whole group instead of individuals.

5. EU-DIMENSION OF THE ACTION

This project is important for the EU, as Genever is a spirit with a PGI status. The EU provides the protection of certain geographical names which are linked to a particular territory, with the aim to protect traditional production methods and to ensure the quality of the product.

Genever is an old traditional spirit, which has historically played an important role in the EU, especially in The Netherlands and Belgium. Also outside of the EU, in the United States and in Africa, Genever has played a role historically and Spirits NL and Vinum et Spiritus want to regain its prominence within the EU.

5.1 Beneficial for other EU producers

The European spirits sector currently generates €21 billion through VAT and excise annually and provides one million European jobs, as well as sales and growth that will stay local – these economic benefits being deeply and firmly rooted in Europe's regions. A promotional project for this important sector improves its position and will contribute overall to an improved market situation and knowledge regarding the quality, taste, diversity and tradition of genever within the EU.

5.2 Protected Geographic Indication, important European scheme

Geographically-specific products that contribute to the culture of their regions are important for the EU. The strong points of the EU agricultural sector are the diversity and the specific characteristics of its products that are connected to the different geographical areas and traditional production methods which combine to give them unique flavours. This provides a diversity and authenticity to the products that consumers inside and outside of the EU are searching for more and more.

"OUR SPIRITS HAVE A WELL-DESERVED REPUTATION FOR QUALITY AND INNOVATION"
Phil Hogan (EU commissioner)

"The spirit drinks sector is important for consumers, producers and the agricultural sector in the Community. The measures applicable to the spirit drinks sector should contribute to the attainment of a high level of consumer protection, the prevention of deceptive practices and the attainment of market transparency and fair competition. By doing so, the measures should safeguard the reputation which Community spirit drinks have achieved in the Community and on the world market by continuing to take into account the traditional practices used in the production of spirit drinks as well as increased demand for consumer protection and information. Technological innovation should also be taken into account in the categories where such innovation serves to improve quality, without affecting the traditional character of the spirit drinks concerned" (Regulation (EC) No 110/2008 of the European Parliament and of the Council).

Distilled spirits are as diverse as the EU itself, spanning 46 product categories and including 240 geographically-specific products. With genever being a relatively new protected category, a promotional project is needed to increase the awareness of this European spirit as an agricultural

product with high quality and a lot of tradition and culture. The project increases the image of Europe as the cradle of spirits with a high quality and a rich history.

5.3 Raising awareness of European products

European Genever is rooted in the culture and history of Europe and understanding European spirits goes beyond export sales, tax revenues generated and net contributions to the European economy. It is about the unique spirit of genever, and the wonderful people who are engaged in the production and sale of European Genever. Europe invites everyone to explore the life of genever, to discover the richness they have to offer and to meet those who are passionate in producing and serving an extraordinary range of quality drinks. From the farmers who cultivate the grain; the workers who gather juniper berries; the sixth and seventh generation master blenders; to the coopers who fashion casks and barrels; all the men and women who comprise the European spirits sector – from the family-owned micro-distilleries to the (sometimes still family-owned) multinationals. European Genever is a spirit that is rich in history, and rich in the diversity of the individuals who make it all happen.

5.4 Synergies between organisations in The Netherlands and Belgium

A selection of genever producers from The Netherlands is currently involved in a promotional project to boost European Genever in the United States. This project consists of several promotional activities and is aimed at the growth of the European export market. The start of this project has led to a unique collaboration of genever producers that is now expanding into a boundary crossing European collaboration, as more producers feel the need to promote European genever as a product of quality, taste, diversity and tradition. This way the joint effort can create a large market share for genever. By means of a media campaign, trade fairs, a promotional tour and study tours the high quality and rich culture of EU products will be promoted throughout the EU.

5.5 Sustainability of the action

Genever entails a big economic sector within the EU and is very labour intensive. In 2017, within The Netherlands alone, production of genever by the largest distillers was more than 110.000 hectolitres. This promotional project is expected to drive additional sales volumes for genever, hence sustaining the existing jobs to produce, market, and sell genever, and can even have the result of creating additional jobs. Both inside the distillers companies as in the distribution channels (retail) and consumption outlets (cocktail bars etc.) will show growth as a result of this project.

The boost of micro distilleries, mostly using 100% natural, locally produced ingredients adds to the environmental benefits of this project.

6. DESCRIPTION OF ACTIVITIES AND ANALYSIS OF BUDGET POSITIONS

The promotional campaign can be split up into six activities:

1. **Media campaign**
2. **Trade fair**
3. **Category Activation and Ambassadors**
4. **Tasting Promotion Kits**
5. Project management
6. Evaluation

The four main activities have been described in paragraph 4.2 and will be further elaborated on in this chapter. Supporting these four main activities, budget will also be allocated to the management of the project and the evaluation of the results.

6.1 Media Campaign

A media campaign will be started to increase the awareness of European Genever among bartenders and retailers in Europe. Retailers are an additional target group, mainly for The Netherlands and Belgium. By having trade press and influential media writing about genever, we will also reach retailers, as some of them will be reading those articles as well.

Why: By having influential, reliable and independent writers, bloggers and influencers (bartenders, food writers, influencers) in the spirits industry write about European genever (its rich story, high quality, versatility and resurgence) a general awareness of the category will be created among bartenders. By carefully choosing the writers and bloggers that are seen as reliable by their public (bartenders), this is expected to create a positive effect in the awareness of bartenders. This is considered to be a cost effective way to target bartenders, as opposed to traditional forms of advertisement like television commercials, printed ads or online banners.

Who: The target audience will be bartenders in Europe. Influential writers/bloggers that can be approached to write about European genever are, among others:

- *Spirits Business*
- *Drinks International*
- *Entree*
- *Influential bloggers in the EU:*
    - *Simon Difford (English)*
    - *Ingmar Voerman (Dutch)*
    - *Mixology (German)*

Where*:* The media campaign will take place throughout selected regions and around the selected European Barshows.

When: The media campaign will span all three years. Only the first year the budget for the website will be higher than in year 2 and 3 because in this year a website will have to be set up.

Work package	Media campaign
Specific objectives	The objectives for the media campaign are to: - Make bartenders aware of European genever as a category; - Educate bartenders in the rich story, high quality and wide range of application of European genever.

Description of activity	For the media campaign the following activities will be carried out: - Hire a PR-bureau to help organize the media campaign; - Select writers/bloggers to approach; - Educate writers/bloggers about European genever and work together with them to write articles/blogs about European genever; - Track the impact of the media campaign by measuring the Gross Rating Points of the articles/blogs that write about European genever.		
	YEAR 1	**YEAR 2**	**YEAR 3**
Deliverables	- 50 articles/blogs that include at least 2 out of 4 key messages - GRP measurements - Evaluation of results and lessons learned for rest of media campaign	- 50 articles/blogs that include at least 2 out of 4 key messages - GRP measurements - Evaluation of results and lessons learned for rest of media campaign	- 50 articles/blogs that include at least 2 out of 4 key messages - GRP measurements - Evaluation of results and lessons learned for rest of media campaign
Result indicators	The media campaign will have the following result regarding the promotion of European genever: - 100.000 bartenders made aware of European Genever		

Budget analysis	**year 1**	**year 2**	**year 3**
Hiring of PR-bureau	€ 50.000	€ 50.000	€ 50.000
Fee of writers/bloggers	€ 25.000	€ 25.000	€ 25.000
Social media	€ 8.500	€ 8.500	€ 8.500
website	€ 10.000	€ 3.000	€ 3.000
Total costs	***€ 93.500***	***€ 86.500***	***€ 86.500***

Implementation	The activity will be executed by both Spirits NL and Vinum Et Spiritus, its members and third parties: - Project Manager via Spirits NL: overall coordination; - Members: Input for media campaign; - PR-bureau (TBD): Planning, coordination and impact measurement of media campaign.

6.2 Trade fairs

The most important awareness activity expected to have the largest impact is the participation in key trade fairs European genever will be promoted as a new category at nation-wide and regional spirit events. At these influential trade fairs, bartenders can directly be made aware of the category by personally telling and showing them everything that is great about European genever.

***Why**:* Trade fairs are gatherings of all important players in the spirits industry, where they share experiences and inform themselves on trends and new products. Trade fairs are “high impact moments” of which there is only a few each year in which smaller brands and categories can really show themselves and make an impact. Therefor trade fairs are an optimal opportunity to promote European Genever and grow its awareness.

Through the stand design and by the persons occupying the stand, bartenders will be educated on European genever. This will be done by both telling the story of European Genever and by showcasing the diversity and versatility of it.

***Who**:* The activation will be open to all attendees of the trade fair. A specific focus (through i.e. the design of the execution) will be on bartenders. Next to that we will focus on importers, as they will be approached to import genever in the target countries.

Where:

- Spain (Alimentaria Barcelona, Madrid)
- United Kingdom (Imbibe, Cocktails in the city, Tales Of The Cocktail on tour)
- Germany (BCB, Hanse Spirit)
- Italy (Gin Day Milan)
- Greece (Athens Bar Show)
- The Netherlands (Genever Day Lowlands)
- Belgium (Genever Day Lowlands)
- Portugal (Lisbon Bar Show)
- Czech Republic (Prague Bar Show)

***When**:* All three years. The first year of the promotional campaign a large investment will be made into the design and in hardware to execute the key events per year. After the initial outlay has been made, the investments the following years will be lower.

Work package	Trade fairs		
Specific objectives	The objectives for the trade fairs are to: - Get in contact with bartenders; - Educate bartenders in the rich story, high quality and versatility of European genever; - Collect business cards/contact details of bartenders.		
Description of activity	For the trade fairs the following activities will be carried out: - Execution of stand, stand design and program - Occupy the stand with employees from Spirits NL, Vinum Et Spiritus and one or more of the 7 European genever companies; - Design a suitable brochure to present the key message; - Create "guest book" to gather contact details; - Follow up actions: Invite influential bartenders from key regions to study tours and extend training invites to local bartenders		
	YEAR 1	**YEAR 2**	**YEAR 3**
Deliverables	- Stand design - Brochure design - Impact measurements - Evaluation of results and lessons learned for future trade fairs	- Update stand design - Updated Brochure design - Impact measurements - Evaluation of results and lessons learned for future trade fairs	- Update stand design - Updated Brochure design - Impact measurements - Evaluation of results and lessons learned for future trade fairs
Result indicators	The trade fairs will have the following results regarding the promotion of European genever: - 50.000 bartenders made aware of European Genever (1st awareness objective) - 3.000 bartenders educated on European Genever (2nd awareness objective)		

Budget analysis	**year 1**	**year 2**	**year 3**
Fair attendance fee (10/year)	€ 60.000	€ 60.000	€ 60.000
Stand design	€ 45.000	€ 10.000	€ 10.000
Brochure design + printing	€ 25.000	€ 9.000	€ 9.000
Activations (after party, seminar, etc.)	€ 50.000	€ 50.000	€ 50.000
Travel costs (ca. 10 people/fair, trip and hotel)	€ 40.000	€ 40.000	€ 40.000

Total costs	***€ 220.000***	***€ 169.00***	***€ 169.000***
Implementation	The activity will be executed by both Spirits NL and Vinum Et Spiritus, its members and third parties: - Project Manager via Spirits NL: overall coordination; - Members: Attendance fair trades; - Designer (TBD): Design brochure, design stand; - Impact measurement (e.g. Quadrant, Motivaction, Occurrence)		

6.3 Category Activation and Ambassadors

To promote the category throughout Europe, we will set up a team of five Category Ambassadors (CAs) for the whole promotion project. Each CA will be responsible for appointed target countries. They will be professional influencers and bartenders who are passionate about genever.

***Why*:** Their goal is to educate other bartenders and create a community of genever aficionados throughout Europe. Their assignment consists of giving trainings, stimulating menu listings and organizing an International Genever Day which will be used to host high-end bartenders in a visit to the home market of genever.

International Genever Day

To attract more attention to genever we will claim one International Genever Day each year during which we will provide a full Genever Experience, where we will promote the diversity of the category. The International Genever Day is an event directed at bartenders throughout Europe, who are invited to celebrate International Genever Day in the home market of genever (The Netherlands and Belgium). The event consists of several category activations, such as a Bartenders Breakfast, seminars and masterclasses, genever tastings, cocktail competition and a Genever Escape Room.

Study Tour (Full Genever Experience)

Influential bartenders will be educated in the rich story and unique production process of Genever by organizing study tours where they are invited to the different distilleries to visit the birthplace of Genever. The trip would include transport (flight), accommodation (hotel), meals and visits to different sites. These sites can be, among others, distilleries, Genever bars and the Genever museum. It is expected that participants, after having experienced the story of Genever, will write and promote on their channels about the category and their experience on the study tour, resulting in an increased interest for European genever.

Who: The super premium and premium bartenders as described in chapter 2.11

***Where**:*

1) Education and create a community will be done in target area as described in chapter 2.7
2) International Genever Day will be executed in target area as described in chapter 2.7
3) The study tours are planned to be executed in The Netherlands and Belgium. The cities Hasselt, Gent (BE), Schiedam, Amsterdam, Dordrecht, and Groningen (NL) can be visited as they are important Genever producing cities.

When:

1) During full period of the program
2) Every year on to be decided date in April
3) Once a year

Work package	Category Activation and Ambassadors		
Specific objectives	The objectives for the Category Ambassadors (CA) are to: - Get in contact with influential bartenders in key regions (i.e. through trade fairs); - Educate influential bartenders in the rich story, high quality and versatility of European Genever; - Showcase influential bartenders how European Genever will fit into their drink assortment of their bar; - Build close relationships with influential bartenders from high-end and select target group: creating a genever community; - Inviting selected bartenders for the International Genever Day to visit the home market of genever for a study tour (Full Genever Experience)		
Description of activity	For the Genever Community the following activities will be carried out: - Planning of the CA program; - Keep a log of the CA program and document the trip via (social) media - Track the impact of the CA program by capturing the opinion of the visited bartender on European Genever through surveys and by measuring follow up European Genever listing in the EU; - Extension of training invites to local bartenders; - Track the impact of the category activations by capturing the opinion of the visited bartender on European genever through surveys and by measuring follow up European genever listing in the EU - Organisation of International Genever Day		
	YEAR 1	**YEAR 2**	**YEAR 3**
Deliverables	- CA program planning - 150 bartenders trained per country/CA - 25 bartenders attending a study tour - Campaign logbook year 1 - Impact measurements - Evaluation of results and lessons learned for rest of CA program - One International Genever Day	- CA program planning - 150 bartenders trained per country/CA - 25 bartenders attending a study tour - Campaign logbook year 2 - Impact measurements - Evaluation of results and lessons learned for rest of CA program - One International Genever Day	- CA program planning - 150 bartenders trained per country/CA - 25 bartenders attending a study tour - Campaign logbook year 3 - Impact measurements - Evaluation of results and lessons learned for rest of CA program - One International Genever Day
Result indicators	The Category Activations will have the following results regarding the promotion of European Genever: - Educate and train 5 category ambassadors, one responsible per target country (keeping in mind there might be turnover during the 3 years) - 2.250 bartenders educated via the CA trainings - 75 bartenders attending International Genever Day - 2.325 bartenders educated on genever in total (2nd awareness objective) - 23.250 bartenders made aware of genever (1st awareness objective). This is 10 times the amount of educated bartenders because bartenders will promote genever within their social networks - 500 new listings in cocktail bars (1st economic objective)		
Checklist for project manager	- Create toolkit for CA - Organize PR and social campaigns - Assist with developing ideas for local events and trainings to differentiate from standard industry activations and trainings		

Budget analysis	year 1	year 2	year 3
Hiring of Genever Category Ambassadors	€ 25.000	€ 25.000	€ 25.000
Planning and coordination of category activations	€ 5.000	€ 5.000	€ 5.000
Organization International Genever Day	€ 7.500	€ 7.500	€ 7.500
Category activations expenses (i.e. travel and hotel)	€ 12.500	€ 12.500	€ 12.500
Study tour (25 bartenders/influencers p/y)	€ 15.000	€ 15.000	€ 15.000
Total costs	***€ 65.000***	***€ 65.000***	***€ 65.000***

Implementation	The activity will be executed by both Spirits NL and Vinum Et Spiritus, its members and third parties: - Project Manager via Spirits NL: overall coordination; - Members: Input for category activations; - Event coordinator (TBD): Planning and coordination of category activations - Impact measurement (e.g. Quadrant, Motivaction, Occurrence)

6.4 Tasting Promotion Kits

Influential bartenders and VIP Media (writers, bloggers, influencers, and press) will be educated in the quality, taste, diversity and tradition of genever by providing them with tasting promotion kits containing one product per participating brand.

Why: This showcases not only the richness of the category, but actively stimulates the target group to experience genever first-hand. We will inspire them to sample genever in one of the many ways to consume it. The tasting promotion kit will be either delivered via post or handed over in person during trade fairs or workshops. In either case, every receiver of a tasting promotion kit will be registered and there will be a follow-up by the category ambassadors to measure the impact.

Who: influential bartenders and VIP Media (writers, bloggers, influencers, press). It is expected that by inspiring media and trade press to sample genever, they will write more about it and therefore reach a broader audience of influential bartenders.

Where: The tasting promotion kits are produced and distributed throughout all five key countries.

When: during full period of the program

Work package	Tasting Promotion Kits		
Specific objectives	The objectives for the tasting promotion kits are to: - Educate trade press and bartenders in the quality, taste, diversity and tradition of genever - Inspiring trade press and bartenders to sample genever		
Description of activity	For the tasting promotion kits the following activities will be carried out: - Design and production of the tasting promotion kit box - Design and production of small bottles for the liquid per SKU/brand - Design and production of communication material connected to the tasting promotion kit - Maintaining a registration system of tasting promotion kit recipients and follow-up - Sending out tasting promotion kits to relevant recipients		
	YEAR 1	**YEAR 2**	**YEAR 3**

Deliverables	- 900 tasting promotion kits produced - 600 tasting promotion kits sent out to media - 300 tasting promotion kits handed over to bartenders - Impact measurements	- 900 tasting promotion kits produced - 600 tasting promotion kits sent out to media - 300 tasting promotion kits handed over to bartenders - Impact measurements	- 900 tasting promotion kits produced - 500 tasting promotion kits sent out to media - 400 tasting promotion kits handed over to bartenders - Impact measurements
Result indicators	The tasting promotion kits will have the following result regarding the promotion of European genever: - 1700 tastings by media/trade press - 240 articles published (1st awareness objective) - 1000 bartenders made aware of genever through tastings (1st awareness objective). - 1000 bartenders educated on genever (2nd awareness objective) - 200 new listings in cocktail bars (1st economic objective)		
Budget analysis	**year 1**	**year 2**	**year 3**
Production and distribution	€ 25.000	€ 25.000	€ 25.000
Total costs	***€ 25.000***	***€ 25.000***	***€ 25.000***
Implementation	The activity will be executed by both Spirits NL and Vinum Et Spiritus and its members: - Project Manager via Spirits NL: planning and coordination of the study tours; - Media bureau: selecting recipients and sending out tasting promotion kits - Impact measurement (e.g. Quadrant, Motivaction, Occurrence)		

6.5 Project Management

Why: To make sure the above elements are executed properly we will hire a Project Manager who can act as the liaison between the clients and the execution parties. There will also be an appointed Project Coordinator from Spirits NL to make sure all the activities are done within the given boundaries, both budget and timewise.

Who - Project Coordinator: Mr. Naudin ten Cate has experience with a similar promotional project that is currently being executed in the United States. He will therefore be the Project Coordinator, representing Spirits NL and Vinum Et Spiritus, the trade organizations.

Budget: €40.000, per annum
This is build-up of from € 20.000 for Project Coordination, plus € 10.000 per trade organization for all project management actions. This is based on a fee of € 400 per day, times 50 days per year for the project coordinator and 50 days for the others employees together.

Who - Project Manager: Before the start of the project, the trade organizations and participating members will hire an external project manager that is yet to be recruited. Criteria for this project manager are defined as follows:

Person/CV:
- Execution oriented, willing to get his or her hands dirty (a do-er versus a thinker)
- A quick learner who can absorb knowledge of Genever category and its history

Must have:
- Worked in and/or have solid knowledge of the spirits industry (client or agency side)

- Thorough knowledge of the spirits market
- Previous experience organizing events, trade show activations, and/or promo tours
- Experience working at/with an agency

People skills:
- Good negotiator
- Good listener, diplomatic and able to find compromise between stakeholders
- Brings people together

Nice to have:
- A good understanding of category marketing
- Knowledge on genever

Budget: €40.000, per annum
This is based on an hourly fee of € 100 and 400 hours per year.

Where: As all of the brands are located in The Netherlands and Belgium, both the Project Coordinator and the Project Manager need to act as the central contact point and must be based in a central location in either one of the two countries.

When: The Project Manager and Project Coordinator will be active throughout the entire promotional project. There will be an emphasis on the beginning of the project, when execution agencies and such are recruited. For the Project Manager, the periods around trade fairs will also be extra busy, where the Project Coordinator will spend extra time by the end of each year to evaluate results and budgets and to report to CHAFEA.

Work package	Project Management		
Specific objectives	- Managing the project - Organizing meetings with relevant parties - Guarding budget, time table and objectives		
Description of activity	- Kick-off meeting Luxembourg CHAFEA - Kick-off meeting trade organizations, creative agency, members - Managing the project: guarding budget and spending - Managing the project: guarding time table and objectives - Managing the project: making sure all stakeholders are represented in final decisions - Managing the project: staying in touch with all involved parties, including agencies (creative, evaluation)		
	YEAR 1	**YEAR 2**	**YEAR 3**
Deliverables	- Kick-off meeting - Evaluation meeting May 2019 - Monthly reporting to the whole group - Weekly updates between PM/PC - Year report with updated budget, evaluation results and insights	- Evaluation meeting May 2020 - Monthly reporting to the whole group - Weekly updates between PM/PC - Year report with updated budget, evaluation results and insights	- Evaluation meeting April 2021 - Monthly reporting to the whole group - Weekly updates between PM/PC - Year report with updated budget, evaluation results and insights - Send-off meeting

Result indicators	The project management will have the following result regarding the promotion of European genever: - Budget spending control (no overspend) - Overseeing execution is according to promotional project plan (regular reports)		
Budget analysis	**year 1**	**year 2**	**year 3**
Project Management Fee Project Coordination	40.000 40.000	40.000 40.000	40.000 40.000
Total costs	***80.000***	***80.000***	***80.000***
Implementation	The activity will be executed by Denis Naudin ten Cate, the other employees from the trade organisations and a to be recruited Project Manager		

6.6 Evaluation

The evaluation agency will be obliged to deliver detailed evaluations based on specified KPIs after each event and throughout the year. Data and results are to be compiled and then audited.

Why: A crucial part of this project will be correct evaluation and compliance. This will be reviewed by the EU to ensure all criteria are met so the subsidy can be reimbursed.

Who: A to be recruited research Institute, for example Quadrant, Motivaction or Occurrence. Each of those parties is an independent and internationally reputable market and user experience research company. They are experts in socio-economic data analysis and have extensive experience in solid research set-ups and data interpretation. Their unique data, models, and knowledge offers insight and integral advice for policy and decision-making processes.

Where: Reporting will be done digitally, but the agency will conduct surveys on the location of trade fairs and online

When: After each event and throughout the year

Work package	Evaluation		
Specific objectives	- Measure the number of bartenders that are made aware of European Genever (awareness) - Measure the number of bartenders that are educated in European genever (awareness) - Measure the number of European genever listings in cocktail bars (economic) - Measure sales of European genever in the EU (economic)		
Description of activity	- Pre-project interviews with all involved parties - Conducting surveys - Tracking numbers of visitors - Tracking articles and online mentions - Tracking sales data and listings (in cooperation with trade organizations)		
	YEAR 1	**YEAR 2**	**YEAR 3**
Deliverables	- Quarterly report (4x) - Annual report (1x)	- Quarterly report (4x) - Annual report (1x)	- Quarterly report (4x) - Annual report (1x)
Result indicators	The evaluation will have the following result regarding the promotion of European genever: - Evaluation of impact Trade Fairs - Evaluation of impact Media Campaign - Evaluation of impact Category Activations and Ambassadors - Evaluation of impact Tasting Promotion Kit - Objectives measurement (evaluation reports)		
Budget analysis	**year 1**	**year 2**	**year 3**

Evaluation costs	€28.500	€28.500	€28.500
Total costs	***€28.500***	***€28.500***	***€28.500***
Implementation	The activity will be executed by an evaluation agency, which is to be recruited. (e.g. Quadrant, Motivaction, Occurrence)		

6.7 Budget per target country

General costs, visual design and other costs are equally divided over the five key countries. For the activities we have divided the budget in a realistic approach, given the fact that we've added secondary countries for the value of the influential trade fairs.

Key countries: Spain, United Kingdom, Germany, Italy, Greece

Secondary countries: The Netherlands, Belgium, Portugal and Czech Republic

Country	Budget promo project
Primary countries	*80% of total budget*
Germany	€ 232.928,00
Italy	€ 232.928,00
Spain	€ 232.928,00
UK	€ 232.928,00
Greece	€ 232.928,00
Secondary countries	*20% of total budget*
The Netherlands	€ 72.790,00
Belgium	€ 72.790,00
Portugal	€ 72.790,00
Czech republic	€ 72.790,00
Total budget	**€ 1.455.800,00**

7. MEASUREMENT OF RESULTS AND ACTION INDICATORS

7.1 Methodology

For a sound evaluation of the action results, we will select a research Institute, for example Quadrant, Motivaction, Occurrence, to execute this for Spirits NL and Vinum Et Spiritus. Quadrant, Motivaction, and Occurrence, are independent and internationally reputable market and user experience research companies. They are experts in socio-economic data analysis and have extensive experience in solid research set-ups and data interpretation. Their unique data, models, and knowledge offers insight and integral advice for policy and decision-making processes.

Awareness impact

Surveys will be used to track changes in the awareness of the target group. At the beginning of each activity focus groups of bartenders will be made, that are representative for the target group(s). Each survey will be based on a set of questions concerning the awareness objectives of European Genever. At the end of the activity, a new survey will be held to measure the improvements in awareness and understanding. This will give a clear picture of the impact the education program has had on the target group (bartenders).

To create a baseline of bartender awareness, a sample size of 1,000 representative bartenders will be surveyed. At every trade fair a same sample size of 1,000 bartenders will be surveyed to measure the impact the trade fair had had on Genever awareness. For the promotional and study tours the number of bartenders that can be reached is limited and therefore all bartenders reached through these activities will be surveyed (a representable sample size will be chosen per activity).

Economic impact

To track the number of European genever listings in cocktail bars over the key regions, the databases of the Spirits NL and Vinum Et Spiritus members that take part in this promotion campaign will be used. All members have a database tracking the number of European genever listing in cocktail bars they have per region in the EU. By annually handing over this data a total number of listings can be calculated, without the members getting to know each other's precise numbers (sensitive company data).

Volume figures for European genever sales in the EU are published annually by IWSR (see appendix). These statistics will be used to define and measure the results (per year and at the end of the campaign) concerning the objective to increase the sales of European genever in the EU.

7.2 Evaluation method per activity

Every activity will require a different approach for evaluation methods, in order to measure the impact of the action on the action objectives of the promotion campaign as described in chapter 3:

A. Increase the number of bartenders that are made aware of European Genever (awareness)
B. Increase the number of bartenders that are educated in European genever (awareness)
C. Increase the number of European genever listings in cocktail bars (economic)
D. Increase sales of European genever in the EU (economic)

Below the different approaches for evaluation methods that will be used to track the action objectives are described per activity. However, not all activities can directly be linked to a result of an objective. For example, in the media campaign it is not possible to track the number of listings in cocktail bars it results in because this link is too indirect to measure. Tracking the increase in sales of European genever in the EU (objective D) can't be linked directly to any of the activities. The impact

on the sales of European genever in the EU can therefore only be measured over the complete set of activities. The increase in sales of European genever in Europe will be tracked through IWSR data.

Activity 1: Media Campaign

A. The impact the media camping has on the number of bartenders that are made aware of European Genever will be measured in the following ways:
    a. Through Gross Rating Points of published articles/blogs about European Genever (carried out after every blog/article);
    b. Through tracking published articles mentions for keyword “genever” in the EU (carried out throughout the year);
    c. Through tracking social media mentions for keyword “genever” over time in the EU (carried out throughout the year).
B. Not applicable, within the media campaign bartenders will not be educated, just made aware;
C. Not applicable, it is not possible to track the number of listings in cocktail bars the media campaign results in because the link is too indirect to measure.

Activity 2: Trade Fairs

A. The impact the trade fairs have on the number of bartenders that are made aware of European Genever will be measured through tracking the number of bartenders of which contact information is gathered at the trade fairs and tracking the number of bartenders that visit the seminars at the trade fairs (carried out annually);
B. The impact the trade fairs have on the number of bartenders that are educated in European Genever will be measured through surveys (carried out annually);
C. The impact trade fairs have on the number of European Genever listings in cocktail bars transcends the category approach of the promotional project and comes down to the data of the members. It will be measured how many cocktail bars are visited by Category Ambassadors after each trade fair and brands can provide information on how many of those cocktail bars have listed one or more of their genevers.

Activity 3: Category Activations and Ambassadors

A. The impact category activations have on the number of bartenders that are made aware of European Genever will be measured through tracking the number of bartenders that are met (carried out annually);
B. The impact category activations have on the number of bartenders that are educated in European Genever will be measured through surveys (carried out annually);
C. The impact category activations have on the number of European Genever listings in cocktail bars will be measured based on the data of listings that the members (anonymously) share with the trade organizations Spirits NL and Vinum Et Spiritus (carried out annually).

Activity 4: Tasting Promotion Kits

A. The impact the tasting promotion kits have on the number of bartenders and trade press that are made aware of European Genever will be measured through tracking the number of bartenders that have received a tasting promotion kit;
B. The impact the tasting promotion kits have on the number of bartenders and trade press that are educated in European Genever will be measured through surveys (carried out annually);
C. The impact the tasting promotion kits have on the number of European Genever listings in cocktail bars will be measured based on Spirits NL and Vinum Et Spiritus member databases (carried out annually).

7.3 Impact, result and output indicators

Below the intended output, result and impact on the objectives are listed per activity.

Activity 1: Media campaign

Type of indicator	Indicator	Quantity	Explanation
Output	Nr of articles/blogs published	150	50 blogs/articles per year
Result	Nr of bartenders reached over 3 years	200.000	On average 1.330 per article/blog
Impact	Objective A: Nr of bartenders made aware	100.000	50% of reached bartenders

Activity 2: Trade Fairs

Type of indicator	Indicator	Quantity	Explanation
Output	Nr of trade fairs visited Nr of brochures distributed over 3 years	30 60.000	10 trade fairs per year 2000 per trade fair
Result	Nr of bartenders reached over 3 years	50.000	around 4000 per trade fair
Impact	Objective A: Nr of bartenders made aware Objective B: Nr of educated bartenders	50.000 3.000	100% of reached bartenders 6% of reached bartenders due to the limited number of bartenders who will take the time to get educated at a trade fair

Activity 3: Category activations

Type of indicator	Indicator	Quantity	Explanation
Output	Nr of bartenders trained	2.250	150 per year per country
	Nr of international bartenders trained at Genever Festival	75	25 per year
Result	Nr of (influential) bartenders reached over 3 years	2.325	through trainings and genever day
Impact	Objective A: Nr of bartenders made aware Objective B: Nr of educated bartenders	23.250 2.325	10 times the number of reached bartenders. This is due to the reach of the social media networks of the bartenders 100% of reached bartenders due to the education being very direct and personal at a promotional tour.

	Objective C: Nr of listings in cocktail bars	500	Around 20-25% of reached bartenders. These are listings that follow the in depth education of decision makers in the CA trainings and in the home of Genever

Activity 4: Tasting Promotion Kit

Type of indicator	Indicator	Quantity	Explanation
Output	Nr of Tasting Promotion Kits delivered	2700	900 per year
Result	Nr of (influential) bartenders reached over 3 years	1000	300-500 per year
Impact	Objective A: Nr of bartenders made aware	1000	100% of reached bartenders
	Objective B: Nr of educated bartenders	1000	100% of reached bartenders due to the tasting promotion kit being very educational
	Objective C: Nr of listings in cocktail bars	200	20% of reached bartenders

Impact of our all four activities compared to the objective

	Objective	Sum of impact of activities above
A. Bartenders awareness	174.250 bartenders	174.250 bartenders
B. Educated bartenders	6.325 bartenders	6.325 bartenders
C. European Genever listings in cocktail bars	700 listings	700 listings

For objective D. 'Increase sales of European genever in the EU', the objective is to sell an additional 312.578 litre a year. This objective is met through the impact the above three objectives will have:

- 174.250 aware bartenders will result in an additional 121.275 litres (a bottle per bartender)
- 6.325 educated bartenders will result in an additional 56.925 litres (9 litres per bartender)
- 700 listings will result in an additional 130.000 litres sold (130 litres per menu listing)

This brings the total impact to an additional 308.200 litres of genever sold. This is just under the objective, but within the margin.

7.4 Return of Investment for the EU genever sector

Because of the difference in both budget and plan of action between the primary and secondary countries, the ROI for these countries is determined separately.

Primary countries

In chapter 3.2 the current sales volume and the objective in sales volume were already mentioned.

- Sales volume of genever 2014/2015 = 139.500 litre
- Objective in three years = 452.078 litre

Based on an average genever price per litre of € 10, the market value of genever in the 5 primary countries combined was approximately € 1,4 million in 2015. Without the execution of a promotion project, the expected market value of genever is expected to decrease to € 1.361.250 in three years (see chapter 2)

However with the execution of this promotion project, genever is expected to get a market share of 0,5% of the total gin/genever market (currently the share is 0,17%). This represents a total market value for genever of €4,5 million. This means a growth of market value of € 3,1 million.

To calculate the Return on Investment the gain (increase in market share – cost of promotion campaign) must be divided by the cost (cost of promotion campaign). The cost of the promotion project in the five primary countries is € 1,16 million. This gives a ROI of (3.1 - 1,16) / 1,16 = **171%**. This is a positive ROI, indicating that if all set out goals will be reached for the planned budget, the project will be a good investment for the primary countries.

Genever consumption 2014/2015 (litre)	139.500
Average genever price (per litre)	€ 10,00
Market value of genever 2014/2015	€ 1.395.000
Expected market value of genever in 3 years, without EU promotion project	€ 1.361.250
Gin/genever consumption 2014/2015 (litre)	80.788.500
Market share of genever in the total gin/genever market 2014/2015	0,17%
Expected gin/genever consumption in 3 years (litre)	90.415.687
Expected market share of genever in the total gin/genever market in 3 years, with the EU promotion project	0,5%
Expected genever consumption in 3 years (litre)	452.078
Expected market value of genever in 3 years	€ 4.520.784
Added value because of the EU promotion project	**€ 3.159.534**
Budget EU promotion project (primary countries)	**€ 1.164.640**

Return on Investment (primary countries)	**171%**

Figure 26. ROI calculation primary countries

Secondary countries

For the secondary markets there is a large difference between the home countries (Netherlands and Belgium) and the two countries that will only be visited for trade fairs (Portugal and Czech Republic).

Home countries

Because the share of genever in the home countries, the Netherlands and Belgium, is already quite big, the focus will lie on growth through premiumization.

The current consumption of premium genever is around 671.445 litres per year. This is 3 to 5% of the total genever market in the Netherlands and Belgium. Based on an average premium genever price per litre of € 12, the current market value of premium genever in the home countries combined is approximately € 8 million. The premium genever market is expected to grow with 1% per year in the home countries. This gives an expected market value of premium genever in 3 years of € 8.3 million.

After the execution of this promotion project, the market share of premium genever in the home countries is expected to grow an extra 2%. This will put the market value of premium genever at € 8.7 million, an increase of € 414k.

The cost of the promotion project in the home countries is € 145k. This gives a ROI of (414 - 145) / 145 = **185%**. This is a positive ROI, indicating that if all set out goals will be reached for the planned budget, the project will be a good investment for the home countries.

Current premium genever consumption (litre)	671.445
Average premium genever price (per litre)	€ 12,00
Current market value premium genever	€ 8.057.340
Expected market value of premium genever in 3 years, without EU promotion project	€ 8.299.060
Expected market value of genever in 3 years, with EU promotion project	€ 8.714.013
The added value of the EU promotion project	**€ 414.953**
Budget EU promotion project (home countries)	**€ 145.580**
Return on Investment (home countries)	**185%**

Figure 27. ROI calculation home countries

Other secondary countries
Within Portugal and the Czech Republic the genever market is currently very small, almost 0. As explained the promotion project includes these countries because of the interesting trade fairs that are held in these countries. So the focus of the project will not necessarily be to get larger market shares for genever in these countries. Going to the trade fairs in these countries will have as a main goal to increase market share of genever in the whole of Europe, especially in the primary countries. However, going to the trade fairs in these countries is still expected to have some influence on the genever market in these countries. Therefor also for these countries a return on investment can be calculated.

Without an EU promotion project the expected genever consumption in Portugal and the Czech Republic will still be 0 in 3 years. With the EU promotion project it is expected that genever will win a share of 0,5% of the total gin/genever market in Portugal and the Czech Republic. The total gin/genever consumption is expected to be around 481k 9 litre cases in 3 years in Portugal and the Czech Republic. 0,5% of this is around 2.4k 9 litre cases of genever. This equals a market value of € 216k (at an average genever price per litre of € 10).

The cost of the promotion project in the other secondary countries is € 145k. This gives a ROI of (216 - 145) / 145 = **49%**. This means that although focus will not be on these countries, the ROI in these countries is still positive, indicating that the project will be a good investment for the other secondary countries.

Current genever consumption (litre)	0
Average genever price (per litre)	€ 10
Current market value of genever	€ 0
Expected market value of genever in 3 years, without EU promotion project	€ 0
Current market share of genever in the total gin/genever market	0%
Expected gin/genever consumption in 3 years (litre)	4.336.875
Expected market share of genever in the total gin/genever market in 3 years, with EU promotion project	0,5%
Expected genever consumption in 3 years (litre)	21.684
Expected market value of genever in 3 years	€ 216.843
The added value of the EU promotion project	**€ 216.843**
Budget EU promotion project (other secondary countries)	**€ 145.580**
Return on Investment (other secondary countries)	**49%**

Figure 28. ROI calculation other secondary countries

Total Return on investment

The ROI calculations for the different markets all show positive Return on investments. If the added values of the primary and secondary markets are summed up and put against the total budget for the EU promotion project, an ROI for the total project can also be calculated. In total the EU promotion project is expected to create an additional market value for genever of € 3.791.331 in 3 years. The total value of EU promotion project is equal to € 1.455.800. This gives an ROI of (€ 3.791.331 - € 1.455.800) / € 1.455.800 = **160%**.

The total added value of the EU promotion project	€ 3.791.331
Total budget EU promotion project	€ 1.455.800
Return on Investment (total project)	**160%**

Figure 29. ROI calculation total project

This will however not be the only return on investment that will come from the project. An increased awareness and sales of Genever in the primary and secondary countries in the EU will most likely also result in increased awareness and sales of genever in other parts of Europe and the world. This is due to Europe, especially Germany and the United Kingdom, being a leading and trend setting market in the spirit industry. If Europe embraces Genever, other markets are very likely to follow.

8. ACTION ORGANIZATION AND MANAGEMENT STRUCTURE

8.1 Experience applying organization

Project management and coordination

The overall project management and coordination of the promotion project is executed by the applicants, Spirits NL and Vinum Et Spiritus. The project leader and coordinator will be Denis Naudin ten Cate from Spirits NL (CV attached in annex). The different activities will be executed by a team of employees from Spirits NL, Vinum Et Spiritus and their members (genever producers). The administrative organization will be done by José Oosterveen (experienced administrator), communication activities and supervising the overall content of the EU message will be the responsibility of Joep Stassen, director of Spirits NL and Geert van Lerberghe, director of Vinum Et Spiritus (CV attached in annex).

Both parties have quite some experience with setting up and executing campaigns to promote spirits, as described in chapter 1.

Profiles staff Spirits NL

Denis Naudin ten Cate (overall project management and coordination) is educated as a lawyer and has worked in the spirits industry since 2006. He is an experienced lobbyist in Europe for Spirits NL and in this role he was involved in the TTIP negotiations of Dutch spirits producers. Mr. Naudin ten Cate is active in promotional activities of genever on a European level. As employee of Spirits NL, Mr. Naudin ten Cate has had extensive involvement with all Dutch producers of genever for the application and implementation of the EU geographical indication (PGI) of the different types of genever. At first with writing the technical files of different types of genever and finding consensus among the Dutch producers together with all the stakeholders of the other member countries (Belgium, France (2 départements) and Germany (2 Bündesländer)).

Joep Stassen (communication and supervision) is a trained lawyer and has worked as a lawyer for a listed company as corporate secretary and in house lawyer. He has worked for the Dutch spirits trade association for over 13 years. Up until 2012, Joep worked for a semi-public commodity board for spirits and since then solely for the Dutch association for spirits importers and producers, Spirits NL. Since 2013 Mr. Stassen was also president of the Board of SpiritsEUROPE, the European representative body for producers of spirit drinks with a membership comprising of 31 national associations representing the industry in 24 countries as well as a group of leading spirits producing companies.

Josée Oosterveen (administration). After working a long period for a Dutch accountancy firm, Josée Oosterveen founded her own firm and became managing partner of Absoluut Administratieve & Fiscale Dienstverlening. Absoluut has two partners and one employee. The business consists of assisting several medium and small-sized enterprises within different branches. Absoluut is a specialist in financial administrations, salary- and personnel administrations besides responsibilities in taking care of different kinds of tax returns. When needed, Absoluut joins forces with a chartered accountant. This all under the slogan: ''there is no business, like your business'', they like to be close with client and create solutions to problems. For Spirits NL, Absoluut works together with Maas Accountants, auditors and tax advisers providing professional services in the Netherlands.

Spirits NL is the Dutch trade association of producers and importers of distilled spirits and promotes its collective interests. Projects of Spirits NL include amongst others the coordination and execution of a three year promotion campaign to promote European genever in the United States (US) together with five Dutch jenever producing member companies. This program has started in the beginning of

2018 and through the coordination and execution of this extensive promotion campaign Spirits NL has gained important EU project experience.

Profiles staff Vinum Et Spiritus

Geert VAN LERBERGHE – (communication and supervision). Geert is a trained lawyer heading the Belgian wines and spirits association (Vinum Et Spiritus) since October 2013. Prior to that Geert worked as an experienced financial expert and company lawyer in the financial industry (KBC and Deutsche Bank), as a consultant (PwC) and as director European Affairs and Risk Affairs at Febelfin (Belgian association of the financial industry). Besides his role as director general at Vinum Et Spiritus, Geert also acts as director at EFWSID (European Federation of Wine and Spirits Importers and Distributors) and as member of the board at SpiritsEUROPE

Muriel JARDIN – Muriel has a longstanding career of more than 30 years as personal assistant to the director general of Vinum Et Spiritus (formerly known as the Belgian Association of Wine and Spirits).

Members Spirits NL and Vinum Et Spiritus (genever producers)

At the time of writing the project proposal, seven genever producers have committed themselves to the project. These genever producers have experience in promoting spirits in foreign countries and some of them are participating in the promotion of genever in the US as well. Their directors and marketing employees have been involved in designing the project and activities and they will be involved during the execution of the project:

De Kuyper: world's largest producer of cocktail liqueurs, family owned, over 320 years old. Has experience with their gin and genever in several European countries, such as Germany and the UK and will use this knowledge in the project. Involved people: Mark de Witte (CEO), James Ravlich (Global Marketing Manager Spirits), Laura Schacht (Global Cocktail Training and Advocacy Manager).

Herman Jansen Beverages: a family-owned distillery, since 1777, has successfully market *Bobby's gin* in the EU, this experience will be used for the genever project. Involved people: Nik Noordermeer (New projects & analyst) and Thom Bartelse (Managing Director).

Hooghoudt: Producer of several distilled beverages, since 1888. Has experience with reintroducing genever instead of gin (in The Netherlands, UK and Italy). Involved people: Arno Donkersloot (CEO) and Hannah Ellens (Brand Manager retail & export)

Inspirits/Bruggeman: A Dutch-Belgian marketing sales and distribution organization for different distilled brands, with offices in Schiedam and Gent. Including both Dutch and Belgium genever within portfolio. Involved people: Hans Boot (CEO Inspirits) and Maaike Philipsen (brand manager)

Onder de Boompjes: Craft distiller & producer of genever & gin since 1658 in Schiedam, in full control of entire distilling process. Will use its experience of distributing Sylvius gin globally for the genever project. Involved people: Jean Paul Batenburg (CEO)

Jajem: Producer of organic spirits since 2015. Handcrafted at the Golden Arch distillery in Amsterdam. Will focus on JAJEM new style genever. Involved people: Jamie van der Will (CEO) and Sarah Alberti (Brand Ambassador)

Filliers: Filliers Distillery has been creating premium spirits such as grain genever, gin and whisky since 1880. The artisanal distillery process at Filliers relies on the craftsmanship and many years of experience of five generations of Master Distillers. Involved in this project are Emile Filliers (Export Account Manager) and Jonas Naessens (Marketeer).

8.2 Implementing bodies

For the implementation of the activities, a qualified and experienced company in the area of communication and promotion in the international European market will be approached. For the evaluation of the actions within this action an agency will be selected that is qualified to perform these tasks.

The applicants have relevant experience with the recruitment of and the cooperation with such companies/agencies. Both implementing body and the evaluation agency will be selected in line with European legal requirements.

For the recruitment of the implementing body, there will be a selection made respecting the following procedure. A call for interest will be published and in addition carefully selected companies will be asked to indicate their interest for participating in a tender procedure. At least three parties will be included in the final tender procedure and forwarded information about the campaign and the activities included and to be implemented. All companies selected for participating in the tender procedure must be independent of the proposing organizations, have a sound financial basis and have experience with similar actions/target groups.

The offers are weighed, using the following award criteria:

1. **Quality:** the service provided must be clear and transparent, entirely consistent with the job description and meet the requirements of the contract documents;
2. **Experience:** with similar (communication) projects: the provider must demonstrate that they have carried out similar projects in the past (references) and is capable to do so at the moment;
3. **Price:** the total price and/or partial prices, billing terms and conditions of supply are compared;
4. **Flexibility:** in case of unexpected events the project should be allocated in a flexible manner;
5. **Knowledge:** understanding of and/or involvement in the spirits sector and the production and consumption (portfolio) and the communication field.

Weighting

1. Quality 40%
2. Experience 10%
3. Price 30%
4. Flexibility 10%
5. Knowledge sector 10%

A value is assigned between 1 and 10 to each of the criteria. These numbers are multiplied by the percentages of the weighting. The tendering party with the highest final score obtains the contract. After the selection is described why this party is selected.

After selecting the implementing body and the evaluating body legal contracts will be made up

clearly indicating tasks, responsibilities and commitments. Specific reference will be given to:

- Keeping time limits
- Keeping budgetary limits
- Reporting
- Financial administration

8.3 Project management structure

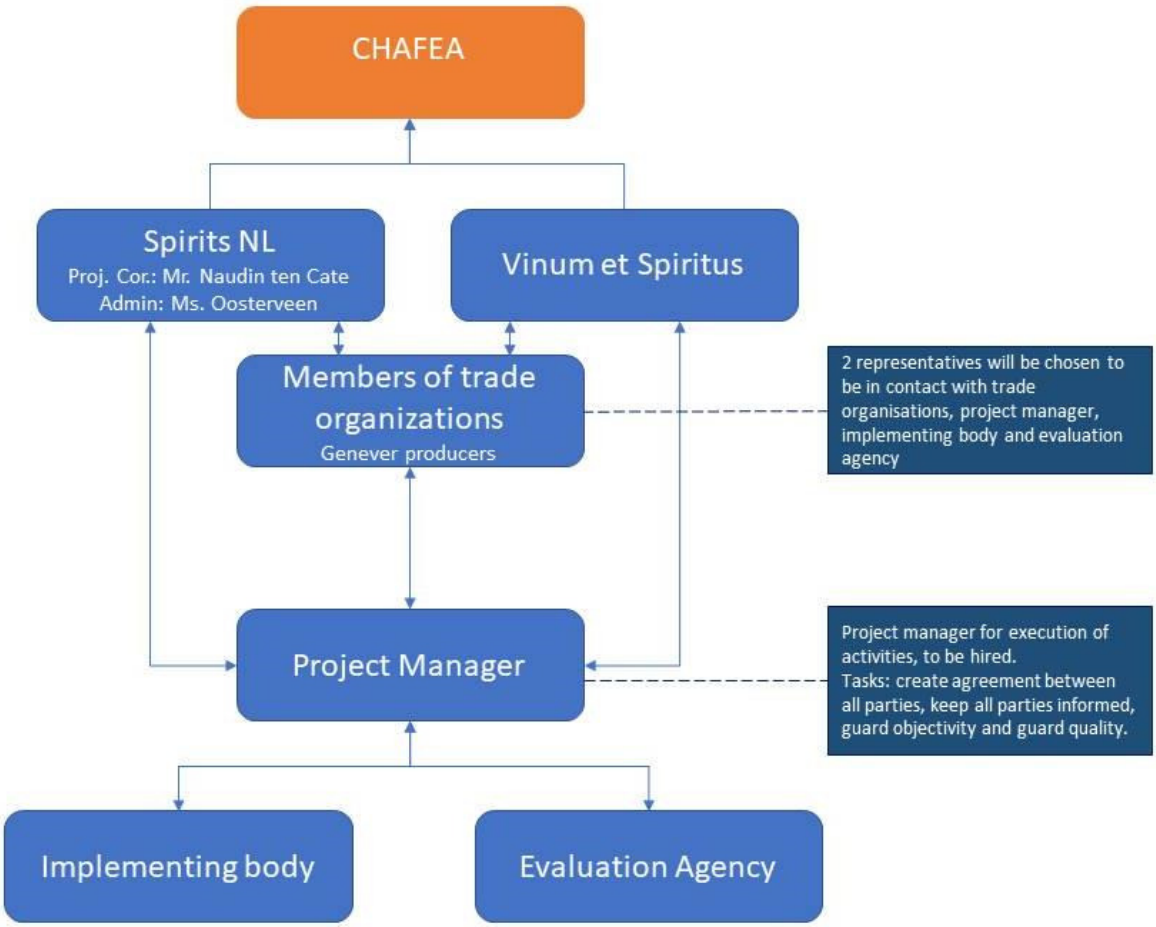


Figure 30. Organization structure for the promotion project

For the execution of the project, a project based management structure will be set up.

- Spirits NL (Mr. Naudin ten Cate) is in the lead and responsible for a sound execution (project coordinator).
- An experienced project manager will be hired before the project starts, to execute the project management on day to day level.
- The administrative tasks are executed by the previous mentioned José Oosterveen.
- Already seven members of Spirits NL and Vinum Et Spiritus have committed themselves to be actively involved with the execution of the project. Employees of these genever producers will provide information for the media campaign, be present at the trade fairs, assist in selecting a suitable ambassador and setting up a promotional tour, guide the selected

visitors on the study tour and give their feedback and support on the overall project. All participants have to be a member of either Spirits NL or Vinum Et Spiritus.

To make sure that the action is implemented on time, within the set budget and that its objectives are met, there will be regular contact between the coordinator, the project manager and the different parties. The activities will be evaluated each year, in order to be able to slightly adjust the plans if needed.

Concerning the European subsidy, Spirits NL is also supported by an intermediate (Craeghs Consultancy) that has extensive experience in guiding European subsidy projects.

8.4 Quality control mechanisms

A project manager will be hired to make sure all planned activities are executed on time, with good quality and with input from all involved parties. In this day to day management, the project manager will be supported by two representatives who represent the genever producers. These representatives are working in the marketing department of the genever producers and have full knowledge of the market, and thus are able to give a lot of detailed information on how to execute the activities for the best results. These representatives are - next to the project manager - the first point of contact for substantive questions from the implementing body.

From our experience with the promotional project for genever in the United States, the above mentioned structure is the most effective way to both guard the set out strategy and budget and provide room for all participants to be involved. It is necessary to have an objective project manager who can bring all these different visions together to one category ambition, as well as acting as a liaison for the trade organizations to make sure all the activities are organized without exceeding the budget or deadlines.

For each individual activity (media campaign, trade fairs, promotional tour and study tours), the implementing body concerned, will on forehand send in a detailed project plan to the project manager and Mr. Naudin ten Cate, project coordinator. Mr. Naudin ten Cate will discuss the plan with the project manager and the members (genever producers). In case the project plan does not meet the expectations, the project manager in liaison with Spirits NL and Vinum Et Spiritus, will ask the implementing body to improve the plan. And if necessary, delay the activity.

Next to that, the implementing body will present an evaluation report of each individual activity after having executed the activity. This evaluation report will be discussed with Mr. Naudin ten Cate and the project manager, to see if the expectations are met in practice. If necessary, future activities will be adapted based on the evaluation results.

And in the extreme case of continuing underperformance, Spirits NL or Vinum Et Spiritus will look for an alternative implementing body.

All this will be included in the contract between Spirits NL or Vinum Et Spiritus and the implementing body.

8.5 Risk Management

The risks that are associated with the implementation of the action can be addressed on different levels:

- Collaboration. Members (genever producers) are needed to execute the project. If the members have a different opinion on activities, the budget or otherwise, it will be difficult to execute the project according to plan. To prevent these discussions, a cooperation

agreement will be drawn up by Spirits NL and Vinum Et Spiritus to be signed by the participating members. This concerns the agreements that have been made while setting up the project, including the financial contributions and the commitment to execute the project according to this plan;

- Market development. If the spirits market in the EU suddenly changes due to unforeseen events, this will influence the outcome of the project especially in terms of expected economic returns. As the trade associations have no direct influence on the market development, this risk is mitigated by a thorough market research beforehand (see Chapter 2 for an overview of this research) and by choosing the right target states (key cities);

- BREXIT. The UK as a key region has the risk of the Brexit, meaning it will no longer be part of the EU during the time of this promotion project. To deal with this risk, the proposal is divided in such a way that key cities within the UK are only a small part of the total focus area. In this way, when the UK is no longer applicable for the execution of this project, the effects will remain the same within the other key countries.

- Negative publicity. For every promotional project there is a risk of negative publicity. This is mitigated by giving total transparency of the product, its history and its production process, to which all genever producers agree and which they see as one of their strongest points. Also, in line with the mission statement of Spirits NL and Vinum Et Spiritus, all messages concern responsible drinking (and prevention of alcohol abuse) by focusing on enjoying a high quality product and always displaying adults in moderate and convivial drinking occasions in spirits advertisements to create positive social norms.

8.6 Finance of action

The proposed activities will be pre-financed by Spirits NL and Vinum Et Spiritus itself, as they have good results on liquidity. The activities that the trade organizations execute are mainly funded from membership fees. Financial contributions by organisation's members are foreseen to finance this action.

Spirits NL has been awarded a grant from the EU for the promotion of European Genever within the United States (under the call: SIMPLE-04-2017; third countries). These activities for the promotion of genever in the EU are clearly separated and different activities than proposed in this proposal, so there will be no overlap between both projects.

9. TIME TABLE

Activity year 1	Q1 2019	Q2 2019	Q3 2019	Q4 2019
Projectmanagment	Kick of	report q1	report q2	report q3
Evaluation		report q1	report q2	report q3
Mediacampaign	Press release PR in NL&BE	PR in PT, UK, FR	PR in DU, ES, GR , CH & IT	
Tradefairs	NL & BE	PT, UK, FR	DU, ES, GR, CH & IT	
Ambassors education community		NL & BE	UK, IT, DU	
Geneverday		X		
Studytour			X	
Tastingkit		PR in PT, UK, FR	PR in DU, ES,	

Activity year 2	Q1 2020	Q2 2020	Q3 2020	Q4 2020
Projectmanagment	report q1-q4	report q1	report q2	report q3
Evaluation	report q1-q4	report q1	report q2	report q3
Mediacampaign	PR in NL&BE	PR in PT, UK, FR	PR in DU, ES, GR , CH & IT	
Tradefairs	NL & BE	PT, UK, FR	DU, ES, GR, CH & IT	
Ambassors education community	ES & GR	UK, IT, DU	ES & GR	
Geneverday		X		
Studytour			X	
Tastingkit	PR in NL&BE	PR in PT, UK, FR	PR in DU, ES,	

Activity year 3	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022
Projectmanagment	report q1-q4	report q1	report q2	report q3	report q1-q4
Evaluation	report q1-q4	report q1	report q2	report q3	report q1-q4
Mediacampaign	PR in NL&BE	PR in PT, UK, FR	PR in DU, ES, GR , CH & IT		
Tradefairs	NL & BE	PT, UK, FR	DU, ES, GR, CH & IT		
Ambassors education community	UK, IT, DU	ES & GR			
Geneverday		X			
Studytour			X		
Tastingkit	PR in NL&BE	PR in PT, UK, FR	PR in DU, ES,		

APPENDIX I - BUDGET OVERVIEW

Budget, promotion Genever in EU				
	year 1	year 2	year 3	
General costs				
Audit certificates, guarantee prefinancing	€ 5.000	€ 2.500	€ 2.500	
4% allowance personel costs	€ 1.600	€ 1.600	€ 1.600	
Hours Spirits NL and Vinum et Spiritus	€ 40.000	€ 40.000	€ 40.000	
Total costs	*€ 46.600*	*€ 44.100*	*€ 44.100*	
Visual design				
Visual design for promotion project	€ 15.000	€ 5.000	€ 5.000	
Total costs	*€ 15.000*	*€ 5.000*	*€ 5.000*	
2. Media campaign				
Hiring of PR-bureau	€ 50.000	€ 50.000	€ 50.000	
Fee of writers/bloggers (product, travel, cash)	€ 25.000	€ 25.000	€ 25.000	
Social media	€ 8.500	€ 8.500	€ 8.500	
Website	€ 10.000	€ 5.000	€ 5.000	
Total costs	*€ 93.500*	*€ 88.500*	*€ 88.500*	
3. Trade fairs				
Fair attendance fee (10/year)	€ 60.000	€ 60.000	€ 60.000	
Stand design/production	€ 45.000	€ 10.000	€ 10.000	
Activations	€ 50.000	€ 50.000	€ 50.000	
Brochure design & printing	€ 25.000	€ 9.000	€ 9.000	
Travel costs	€ 40.000	€ 40.000	€ 40.000	
Total costs	*€ 220.000*	*€ 169.000*	*€ 169.000*	
4. Category activations				
Geneverday	€ 7.500	€ 7.500	€ 7.500	
Planning and coordination category activations	€ 5.000	€ 5.000	€ 5.000	
travel expenses (i.e travel and hotel)	€ 12.500	€ 12.500	€ 12.500	
Genever category ambassadors	€ 20.000	€ 20.000	€ 20.000	
Studytour	€ 30.000	€ 30.000	€ 30.000	
Total costs	*€ 65.000*	*€ 65.000*	*€ 65.000*	
5. Tasting promotion kit				
production & distribution	€ 25.000	€ 25.000	€ 25.000	
Total costs	*€ 25.000*	*€ 25.000*	*€ 25.000*	
Other Costs				
Salary PM & representation costs	€ 40.000	€ 40.000	€ 40.000	
Evaluation	€ 28.500	€ 28.500	€ 28.500	
Total costs	*€ 68.500*	*€ 68.500*	*€ 68.500*	
Total costs	**€ 533.600**	**€ 461.100**	**€ 461.100**	**1.455.800,00**
EU subsidy (80%)				1.164.640,00
Own funds (20%)				291.160,00

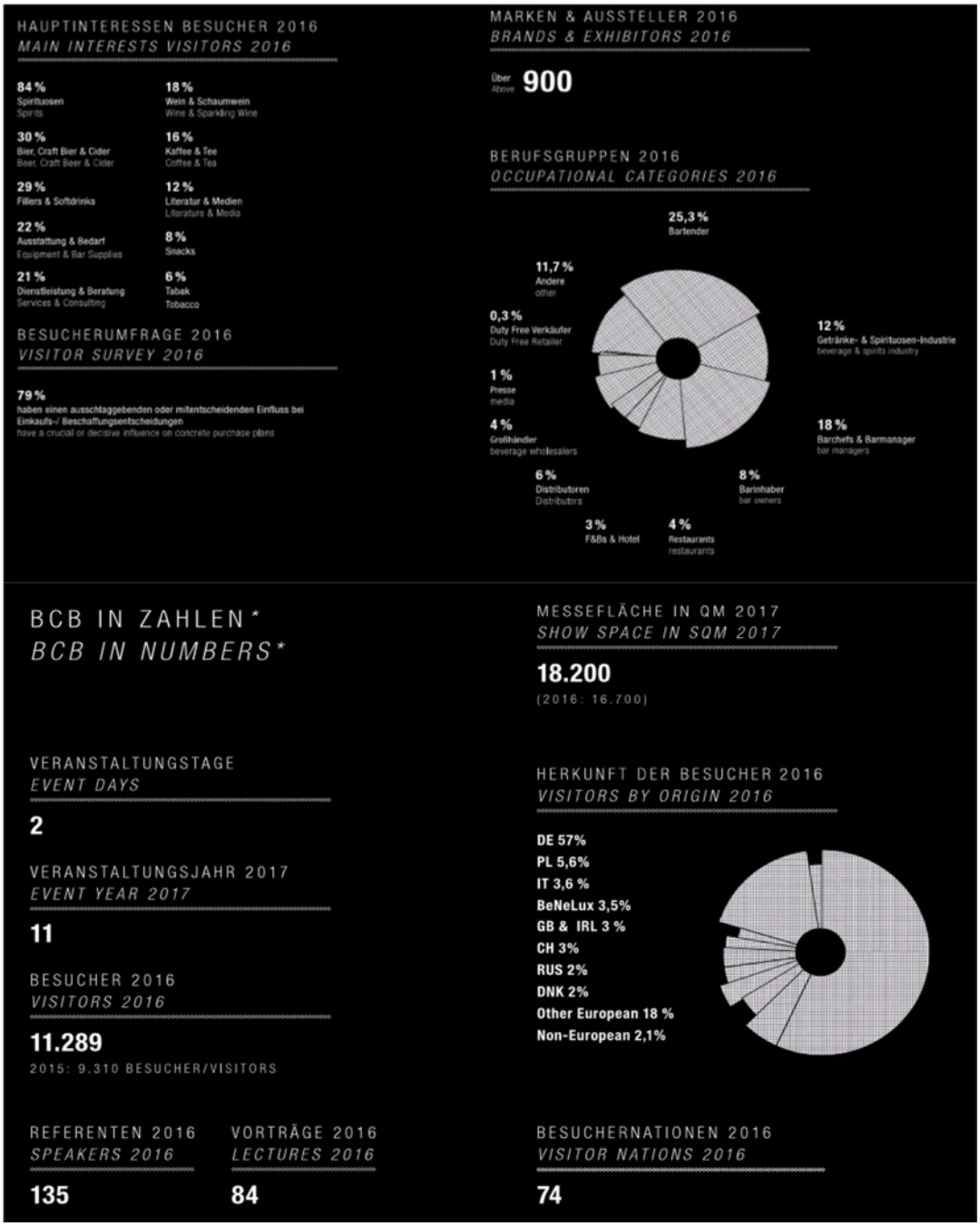
APPENDIX II: DATA ON TRADE SHOWS IN KEY CITIES

Athens Bar Show

Athens Bar Show is an annual educational expo for bartenders and bar professionals.

Last year's event surpassed the 8,000 guests mark, and attendance grows year after year emphasizing the enormous potential of Greek bar scene which has come to be considered one of the most emerging worldwide.

Bar Convent Berlin



Prague Bar Show

- Hundreds of bartenders, bar managers, owners of clubs, bars, cafés and restaurants all over the Czech Republic and Slovakia.
- Czech and international producers and distributors of products and services to the bar sector
- Big brands, family distillers, new products, spirits, liquors, soft drinks, beers, coffee etc.
- Sommeliers, drink experts, designers and architects, audience, trade media
- Over 12 hours of professional seminars by world`s top mixologists and new brands
- Over 800 sqm of event space

Lisbon Bar Show

On 15 and 16 May 2018, all roads lead to the 5th edition of the Lisbon Bar Show will continue to be present at Convento do Beato, and will bring to the capital lusa the biggest names in international bartending as in the successes of have used previous years.

To live up to the high expectations of the more than 5,000 visitors the most important and recognized bartenders at national and international level, positioning itself as a knowledge platform and networking, through which suppliers, brands, outlets, bartenders, experts or simply passionate about the industry can stay abreast of what is best in this area.

In this perspective, the Lisbon Bar Show hosts various seminars and workshops in the course of the event to enable visitors to learn new techniques, trends and industry news with some of the best in the world.

London Cocktail Week

London Cocktail Week is the biggest, most vibrant celebration of our capital's fantastic cocktail scene and the biggest event of its kind - in the world! With 300 bars signed up to the Cocktail Tours and a week-long cocktail village at its heart, this is the ultimate week off work for those that love a mixed drink... Whether you're a gin lover or a whisky guy - there's something for everyone during this week-long excuse to call in sick. From Clapham to Clerkenwell and all London boroughs in between - we cherry pick the list of venues to bring you the very best drinks offering from around the capital.

London Imbibe Live

SENIOR BUYERS FROM…

Bars & Pubs

London Cocktail Club, Mothership, The Pig, Meat Liquor, ETM Group, Mitchells & Butler, Youngs, Atlantic Inns

Hotels

Mandarin Oriental, The Savoy, The Edgbaston, Macdonald Hotels, Accor Group, Ace Hotel, Salcombe Harbour Hotel

Restaurants

Dishoom, D&D London, Barrafina, MASH, Hawksmoor, HIX Restaurants, Inception Group, Gondola Group

Clubs

Deltic Group, The Hospital Club, Arts Club, Ministry of Sound, The Groucho Club

SOCIAL MEDIA

28,000

15,000

5,000

@DarnleysFin
Fantastic couple of days with the team, great chats with people and a lot of love for the new #navystrength Gin. #imbibelive #darnleysgin

@AmathusDrinks
What a show... a huge thank you to all the #Amathus team, our producers & everyone who came to visit our stand. Until next year #ImbibeLive

11,923

ABC AUDITED VISITORS

Imbibe Live is the innovative and interactive annual exhibition for anyone who sources, buys or serves drinks in the licensed on-trade.

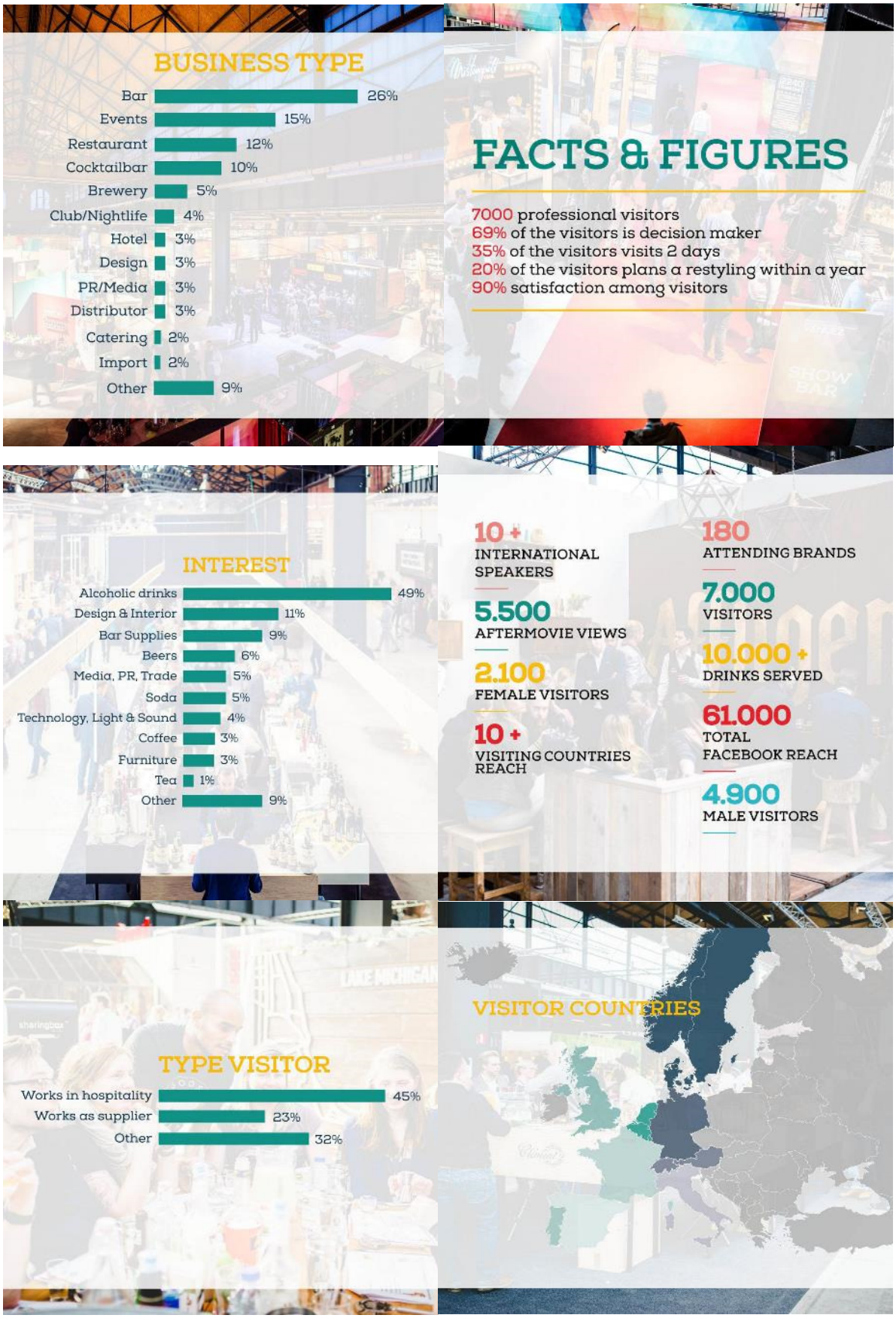
BUYING POWER & INFLUENCE

80% Spirits & Mixers	40% Furniture/ equipment
75% Wine & Champagne	48% Technology
75% Beer & Cider	55% Tea & Coffee
67% Soft Drinks	50% Snacks

250+ EXHIBITORS AND OVER 1,000 PRODUCERS INCLUDING…

Auchentoshan, Bibendum, Boutinot, Britvic, Bulwark Cider, Carlsberg, Tayto Group, Darnley's Gin, Diageo, Drinkstuff, Eurowines, Fever-Tree, Freixenet, Fullers, Kettle Chips, Mangrove, Maxxium, Molson Coors

VISITORS INCLUDING:

OWNERS/PROPRIETORS
DIRECTORS/MDs/CEOs
BAR/RESTAURANT/HOTEL MANAGERS
F&B MANAGERS BARTENDERS
SOMMELIERS

Venuez Antwerp