



**ANNOUNCEMENT**

**IVAN & PETR**

A group of young people are gathered outdoors, likely on a rooftop or patio, enjoying beer. In the foreground, a woman with long brown hair, wearing a pink beanie and a green jacket, holds a glass of beer. Behind her, a man with curly blonde hair and another man with dark hair are also holding glasses of beer. They are all smiling and appear to be in a social setting. The background shows a brick wall and some foliage.

**IT USED TO BE NICHE, NOW THE  
NEW DRINKING TREND IS HERE TO  
STAY**

**CLUE: IT'S A FASTEST GROWING  
BEER SEGMENT**



## Why Non-Alcoholic Beer Is Growing – Europe & Beyond

- 🧠 **Health & Wellness First**

Consumers seek moderation, fewer calories, and alcohol-free socializing — especially Gen Z & Millennials.

- 🕒 **More Occasions, More Demand**

Fits into lunch breaks, work events, weekday evenings, or post-sport — anytime alcohol doesn't.

- 🍺 **Taste No Longer a Compromise**

Modern brewing delivers full-flavor beer experiences, eliminating past stigma around “near beer.”

- 🙌 **Social Acceptance & Inclusion**

Being sober-curious is cool — NA beer is now a smart, modern choice, not a fallback.

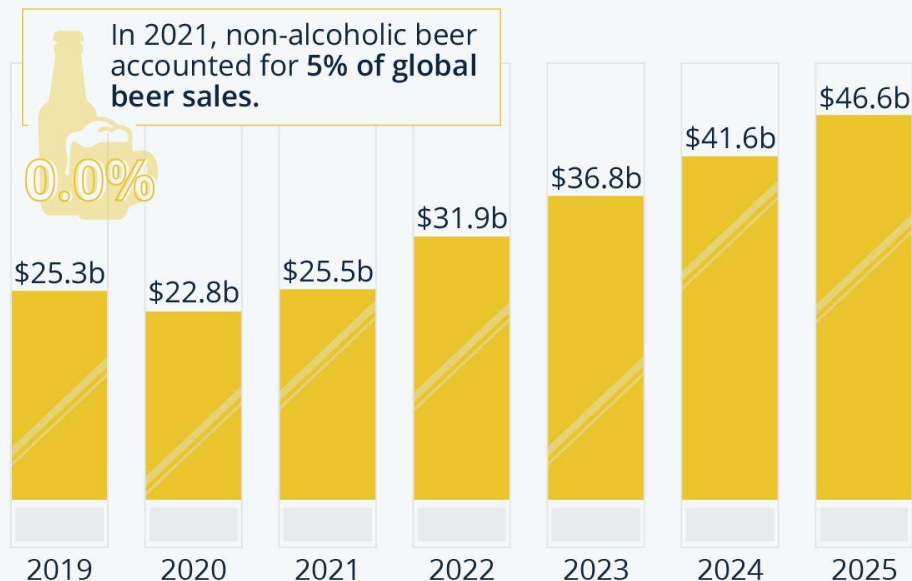
- 📢 **Regulatory & Commercial Advantages**

0.0% ABV allows wider advertising, sponsorship, and placement in venues off-limits to alcohol.

# DATA IS PROVING THE CONSUMER TRENDS

## Buzz-Free Drinking? The Rise of Non-Alcoholic Beer

Estimated global sales of non-alcoholic beer



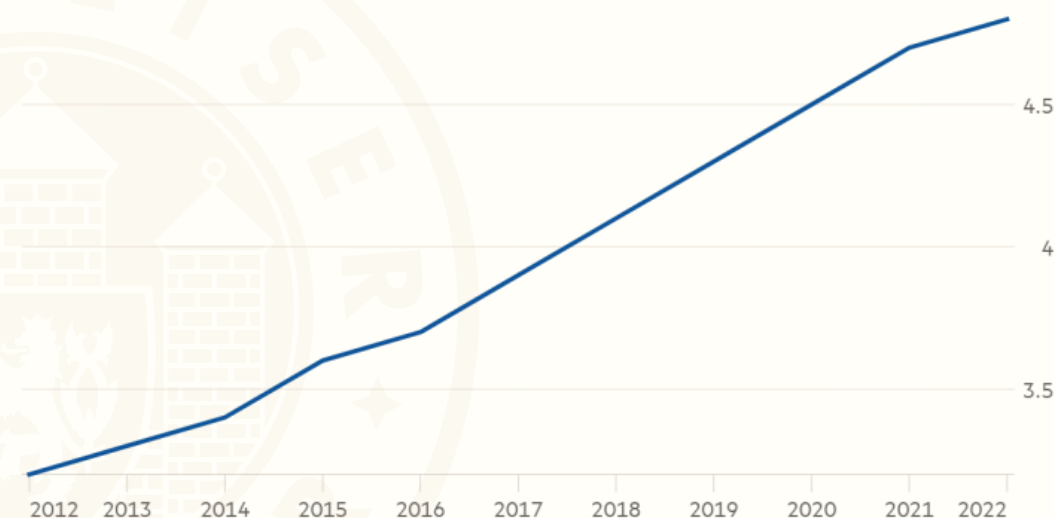
Source: Statista Consumer Market Outlook



statista

## Sales of non-alcoholic beer surge

Global volumes (bn litres)



Source: Euromonitor  
© FT

# NEW GENERATION HAS A DIFFERENT PERCEPTION OF ALCOHOL, WHICH IS ACCELERATED BY SOCIAL MEDIA

Generation Z appear to be more cautious than their predecessors in their relationship to alcohol

## Health—physical and mental

Generation Z is **well-educated about the health risks associated with behavior such as excess alcohol consumption**. This makes them more questioning of why they would want to drink.

## Perception/image of drinking

Google research in 2019 showed that **41% of Generation Z associated alcohol with 'vulnerability', 'anxiety', and even 'abuse'**.<sup>1</sup> Zoomers report drunkenness as unsettling and thus unappealing. It is also seen as uninteresting and 'uncool'.

## Control

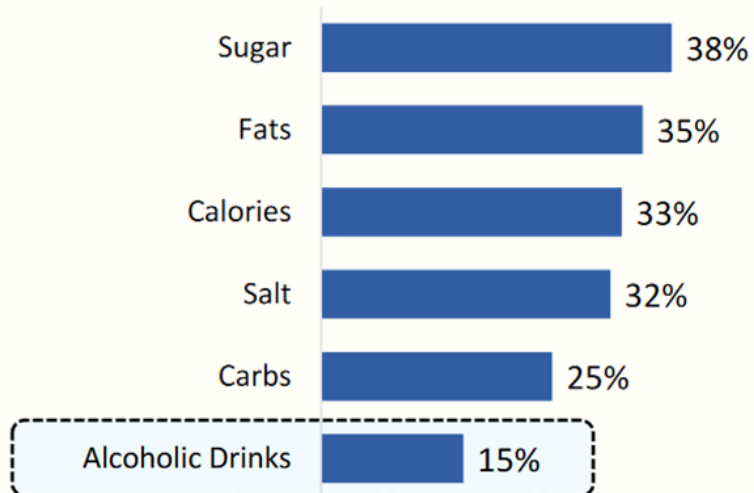
According to Google research, **60% of UK Generation Z associate drinking with a loss of control—49% reported that their online image is always at the back of their minds**.

## Cost

**The expense of alcohol comes on top of the loss of control**. This creates an incentive to moderate/avoid.

## DECLARED MODERATION OF ALCOHOL USAGE OF 15% THIS IS HOWEVER LOWER THAN OTHER FOOD CATEGORIES.

*"I am actively trying to consume less..."*



**15%** of global consumers are actively trying to reduce their consumption of alcohol, compared to **38%** of consumers who are trying to reduce their sugar intake

# NON ALCOHOLIC BEER IS FREQUENT CHOICE FOR PEOPLE STRIVING FOR HEALTHIER LIFESTYLE

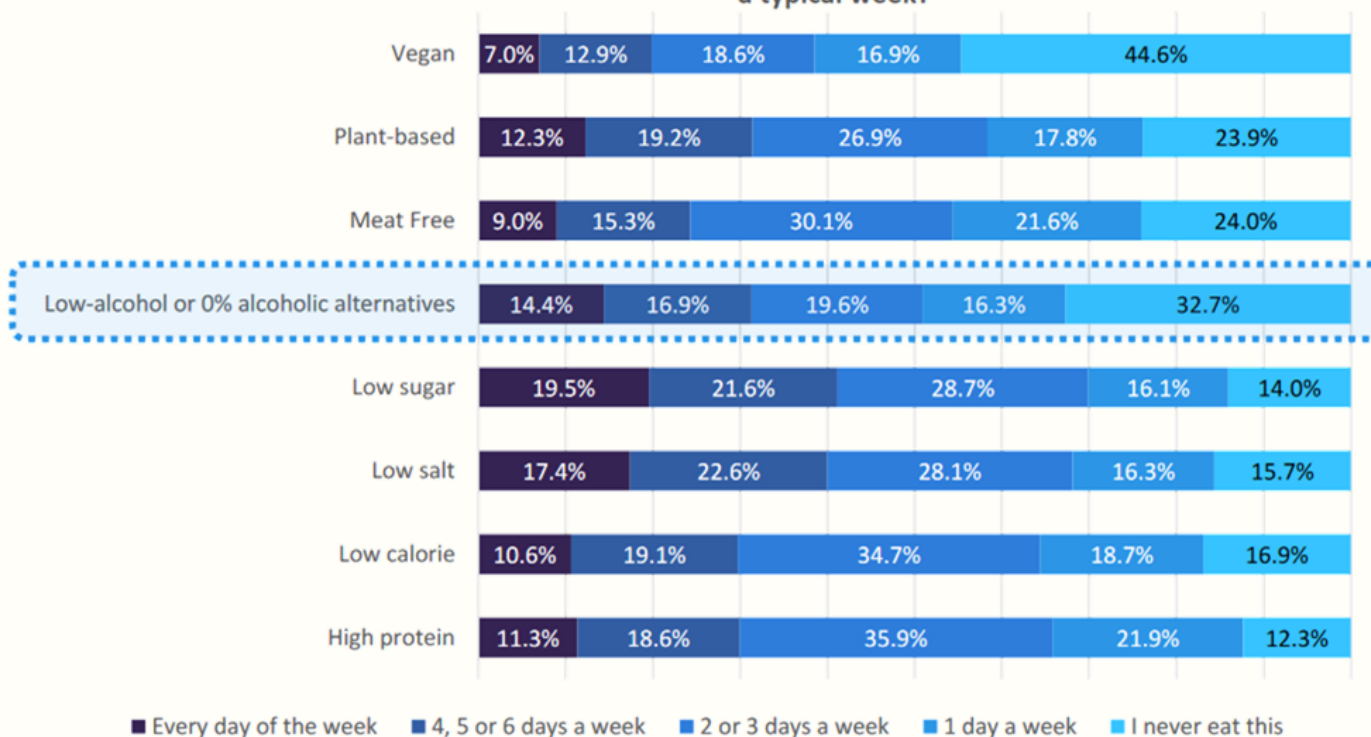
**Low sugar; low salt;  
and Low or 0% Alcohol**

are the most frequently  
consumed types of food  
commonly classed as  
"healthier".<sup>1</sup>

**67%**

of consumers buy low alcohol  
or 0% alcoholic alternatives  
at least 1 day a week<sup>1</sup>

Global, Q1 2023: How often do you consume each the following types of food during a typical week?<sup>1</sup>



Source: [1] GlobalData 2023 Q1 global consumer survey





ARE WE LATE TO THE GAME?  
THERE IS SOOOO MUCH CHOICE  
ALREADY



**YES, BUT WE WANTED TO BE SURE IT WILL  
BE WORTH IT**



# OUR NEW BUDVAR 0.0%

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- WE DIDN'T WANT TO FAKE IT — NO SHORTCUTS, NO ARTIFICIAL AROMAS
- OUR NEW 0.0% LAGER IS BREWED JUST LIKE OUR CLASSIC — WITH TOP INGREDIENTS AND TRADITIONAL METHODS.
- ALCOHOL IS REMOVED GENTLY AT THE END, USING A COLD MEMBRANE PROCESS THAT KEEPS THE FULL LAGER FLAVOR INTACT.
- TOGETHER WITH OUR TECH PARTNER, WE CREATED A CUSTOM MEMBRANE TO PROTECT THE TASTE THAT MAKES BUDVAR, BUDVAR.







**AVAILABLE SINCE**  
**SPRING 2026**