

13TH GLOBAL BOTTLED WATER CONGRESS

10-12 October 2016, Prague



Conference: Flowing with purpose
Karlovarské plant tour
International market developments
Natural and aqua plus innovation
Global Bottled Water Awards

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13TH GLOBAL BOTTLED WATER CONGRESS

ABOUT THE EVENT

Zenith's Global Bottled Water Congress is now in its 13th year, having become one of the best sources for international market updates and networking in the industry. Designed for industry leaders, suppliers, customers and analysts to gain a complete overview of the latest market trends, the Congress provides key insights across all continents from leading companies in each region and extensive time for informal discussion.

Consumers are ever more intently looking for healthier hydration alternatives to other drinks. As a result, bottled water is gaining share of the global beverage market and been energised by innovation, with the category expanding to include new design, sparkle, flavour and functionality. This year's event provides a very timely occasion to look at how the market is shifting, what the opportunities are for further growth and what impact this will have on strategic priorities.

The Congress includes a tour of a major bottling plant, two days of conference sessions and a gala awards dinner. Delegates will hear from leading international and regional manufacturers on market and strategic developments, as well as from newer innovators and entrepreneurs creating new concepts and products, helping shape the market of the future.

Highlights include:

- Conference presentations by a range of leading producers and innovators
- Extensive networking time with key industry figures
- Market insights and updates
- Gala industry dinner with presentation of 2016 Global Bottled Water Awards
- Plant tour hosted by leading national producer Karlovarské Minerální Vody



MONDAY 10 OCTOBER

KARLOVARSKÉ MINERÁLNÍ VODY BOTTLING PLANT TOUR

10.30 / Coach leaves Corinthia Hotel for 130km journey to Karlovy Vary, also known as Carlsbad. Packed lunch to be provided on the coach. Hotel foyer

13.00 / Arrive, refreshments, bottling plant tour

The Karlovarské Minerální Vody bottling plant is the biggest for bottled water in the Czech Republic. Its six production lines fill 200 million bottles a year.

4 lines are for PET, 1 is for glass and 1 is aseptic. These are used for still, sparkling and flavoured water, fruit juice and fruit drinks. The main brands are Mattoni natural mineral water, Aquila spring water, Granini fruit juice and Fruttimo juice drinks.

The site also has blow moulding facilities. Pre-forms are moulded from granules nearby.

15.00 / Coach departs for return journey to Prague

17.30 / Coach reaches Corinthia Hotel

18.30- / **WELCOME RECEPTION** Cocktail lounge



CONFERENCE: FLOWING WITH PURPOSE

TUESDAY 11 OCTOBER

REGIONAL MARKET PERSPECTIVES

- 09.00 / **Welcome and Czech Republic market overview** Bellevue
Overview of national and regional perspectives, recent market developments including international influences plus importance of innovation and strong distribution in successful brand building.
Alessandro Pasquale, Chief Executive Officer of **Karlovarské Minerální Vody**, Czech Republic
- 09.15 / **Providing consumers with what they want**
Perspectives on the challenges and opportunities of introducing enhanced waters in a fragmented and competitive market as consumers gravitate increasingly towards healthy choice and added value.
Marian Sefcovic, General Manager of **Radenska**, Slovenia
- 09.30 / **Modelling demand for bottled water in Russia**
The largest producer of natural mineral water in the Baltics and CIS region, with products in 30 countries, shares its perspectives on identifying new target markets and driving forward export success.
George Pavlov, Chief Financial Officer of **IDS Borjomi International**, Ukraine
- 09.45 / Questions and discussion
- 10.15 / Hydration break and networking

GLOBAL MARKET OUTLOOK

- 11.00 / **Taking the lead on water stewardship**
World market leader on protecting sources, safeguarding sustainability and responding to environmental concerns.
Diego Antonello, Head of Operations for **Nestlé Waters Europe**
- 11.20 / **Ensuring successful international expansion**
Germany's leading exported bottled water brand on the importance of brand proposition and portfolio in ensuring success on the international bottled water market
Dietmar Spille, Executive Vice President International for **Gerolsteiner Brunnen GmbH & Co KG**, Germany
- 11.40 / **Keynote address: Broadening the appeal of water**
World leader in aqua drinks on current success and future potential through positioning, flavour, lifestyle and functionality.
Francisco Camacho, Executive Vice President of **Danone Waters**, France
- 12.00 / Questions and discussion
- 12.30 / **An ocean of opportunity in bottled water dispensing closures**
Heather Barbarino, Global Director – Marketing and Innovation for **Aptar Food + Beverage**, United States
- 12.45 / **New closure generation: enhanced performance and convenience**
Volker Spiesmacher, Marketing and Sales Director for **Bericap GmbH**, Germany
- 12.55 / Lunch Let's Eat Restaurant

INTERNATIONAL GROWTH MARKETS

- 14.15 / **Global beverage market trends and developments** Bellevue
Detailed insights on global drinks consumption; key growth markets and regions; challenges, opportunities and market outlook.
Richard Hall, Chairman of **Zenith International Ltd**
- 14.30 / **Key markets to watch**
- World's fastest growing bottled water markets
- Changing consumer perceptions of healthy hydration
- Trading up to bottled water from carbonated soft drinks
- Spotting market opportunities and taking market share
Hans Pronk, Director - Beverages at **Rabobank International**, Netherlands
- 14.45 / **Export: seeking success in a crowded market**
Importance of differentiation and adapting products to maximise export opportunities in competitive emerging markets.
Henry Heng, Managing Director of **The Refresh Group**, Australia
- 15.00 / Questions and discussion
- 15.30 / Refreshments and networking

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TUESDAY 11 OCTOBER

16.00 / PERSPECTIVES ON COMMUNICATING WATER BENEFITS

Presenting the facts, responding effectively to negative press around bottled water and helping consumers make healthier choices.

Patricia Fosselard, Secretary General of **European Federation of Bottled Waters**, France

Dietmar Spille, Executive Vice President International for **Gerolsteiner Brunnen GmbH & Co KG**, Germany

Joe Doss, President and Chief Executive Officer of **International Bottled Water Association**, United States

Alessandro Pasquale, Chief Executive Officer of **Karlovarské Minerální Vody**, Czech Republic

17.00 / Close

GLOBAL BOTTLED WATER AWARDS

19.00 / Drinks reception

Cocktail lounge

19.30 / Gala Industry Dinner

Bellevue

21.30 / Global Bottled Water Awards presentation

The 2016 Awards attracted over 100 entries from 25 countries in 11 categories, demonstrating creativity, innovation, marketing, community initiative and environmental best practice. The Awards are organised with the support of the International Bottled Water Association and BeverageDaily.com.

**Global Bottled
Water Awards
2016**



WEDNESDAY 12 OCTOBER

NATURAL WATER INNOVATION

09.00 / Changes to watch in bottled water

Bellevue

Focus on innovation in bottled water, including kids' drinks, enhanced water products and premium offerings.

Esther Renfrew, Market Intelligence Director of **Zenith International Ltd**

09.20 / Premium positioning through innovation in packaging

The importance of packaging design and innovation in building a successful premium brand.

Jesús Núñez, General Manager – Water and Soft Drinks Unit for **Mahou San Miguel Group**, Spain

09.40 / Questions and discussion

10.00 / Hydration break and networking

AQUA PLUS INNOVATION

10.45 / Flavours to favour

Extending the appeal of an iconic premium brand with new flavour variants and a sparkling format.

Ken Gilbert, Group Chief Marketing Officer of **Voss USA Inc**, United States

11.00 / Disrupting the bottled water market

Black water with fulvic acid to develop a natural detox sector, what impact to expect and how widely it is developing.

CJ Comu, Founder, Chairman and Chief Executive Officer of **EarthWater Plc**, United States

11.15 / Arctic+: taking a broad look at functional appeal

How far do consumers influence the creation of new functional products; and how far do companies influence consumer buying patterns?

Jiří Vlasák, Chief Executive Officer of **Hoop Polska Sp zoo**, part of Kofola Group, Poland

11.30 / Tree water trends and outlook

Perspectives on the increase in plant-based waters, where they sit in the wider beverage category and what are the future prospects for the sector.

Paul Lederer, Founder of **Tápped**, United Kingdom

11.45 / Questions and discussion

12.15 / Lunch

Let's Eat Restaurant

CONFERENCE: FLOWING WITH PURPOSE

WEDNESDAY 12 OCTOBER

BREAKTHROUGH NEW BUSINESS

- 13.30 / **The changing investment landscape for beverage start-ups** Bellevue
With the bottled water category broadening out and health and wellness now a key strategic focus, investment in new products and concepts is at an all-time high. This session will provide advice and guidance on how to attract the right level of investment and strategic support to succeed in a changing and very competitive market.
William Anderson, Founder and Chief Executive Officer of **First Beverage Group**, United States
- Entrepreneur shoot out**
Speakers will make a 10 minute presentation followed by 10 minutes of feedback from the panel.
- 13.45 / **Perkii: Probiotics in water**
Pushing functional water into new probiotic territory, delivering on taste and flavour, promoting a broader health and wellness message.
Randolph Milne, Chief Executive Officer of **Perkii Probiotics**, Australia
- 13.55 / **Making water appealing to the younger consumer**
Case study in developing bottled water for kids and how to maximise further growth and innovation in this niche sector.
Heather McDowell, Founder of **Tickle Water**, United States
- 14.05 / **Smart hydration products**
Innovation which provides smart solutions to help promote good hydration whilst pushing the beverage sector into the "Internet of Things"
Yoav Hoshen, Co-founder of **Water IO**, Israel
- 14.15 / **Expert panel**
Panel will comment on innovator presentations, brand building, financing future expansion and gaining distribution.
William Anderson, Founder and Chief Executive Officer of **First Beverage Group**, United States
Jiří Vlasák, Chief Executive Officer of **Hoop Polska Sp zoo**, part of Kofola Group, Poland
Ken Gilbert, Chief Marketing Officer of **Voss USA Inc**, United States
- 14.45 / Chairman's closing remarks
- 15.00 / Close

Programme correct as at 3 October 2016

ABOUT BOOKING

Congress package includes plant tour, reception, awards dinner, conference sessions and documentation. Excludes accommodation.

Details	Payment by 29 July SUPER SAVER <small>Limited availability</small>	Inc VAT	Payment by 2 September SAVER	Inc VAT	Payment after 2 September STANDARD	Inc VAT
Full congress						
One delegate rate	€1290.00	€1560.90	€1490.00	€1802.90	€1690.00	€2044.90
Two delegate rate (per person)	€1190.00	€1439.90	€1390.00	€1681.90	€1590.00	€1923.90
Three delegate rate (per person)	€1090.00	€1318.90	€1290.00	€1560.90	€1490.00	€1802.90
Separate elements						
10 Oct plant tour, reception	€200.00	€242.00	€250.00	€302.50	€300.00	€363.00
11 Oct Conference	€700.00	€847.00	€800.00	€968.00	€900.00	€1089.00
11 Oct Awards dinner	€150.00	€181.50	€170.00	€205.70	€190.00	€229.90
12 Oct Conference	€550.00	€665.50	€600.00	€726.00	€650.00	€786.50

*Participation in plant tour should be confirmed by 30 September, otherwise availability cannot be guaranteed.

To qualify for multiple delegate discounts, bookings must be made together. Substitutions will be accepted at any time. Cancellations will be subject to a €130 plus VAT administration charge and cannot be made after 2 September. Bookings are subject to Zenith events terms and conditions, see www.zenithinternational.com/events. All delegates must pay Czech Republic VAT at prevailing rate, currently 21%. Rate may be subject to change. VAT reclaim information is available on request.

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ABOUT THE LOCATION

Located on the Vltava River, **Prague** is the largest city and capital of the Czech Republic. It has played a key political, cultural and economic role in Central Europe and in 1992 the historic centre of the city was named a UNESCO World Heritage Site. Welcoming around 6.5 million visitors every year, famous attractions include Prague Castle and the Old Town Square.

The Congress will be held at the **Corinthia Hotel Prague**, which is located a short metro ride from the city's most famous landmarks and enjoys breathtaking views across the city. Facilities include a choice of restaurants, a café and jazz bar, a luxury day spa including pool, gym and sauna. The hotel is 20km from Vaclav Havel Airport.

An **allocation of rooms** is available at negotiated rates for delegates attending the Congress. For more information and to book, please visit www.zenithinternational.com/events

Corinthia Hotel Prague, Kongresova 1, Prague 4, 140 69, Czech Republic **t** +420 261 191 111 **f** + 420 261 225 011 **e** prague@corinthia.com

Congress registration: Please book online at www.zenithinternational.com/events or call the Events Department on +44 1225 327900 for information. Visas may be required from some countries. Zenith will be happy to help with visa support documentation where possible.



ABOUT ZENITH INTERNATIONAL

Recognised since the 1990s as Europe's leading drinks consultancy, Zenith International has over 1,000 clients across more than 50 countries.

These include:

- world leading as well as local and newly formed food and drink manufacturers
- equipment, ingredient and packaging suppliers
- financial institutions, agencies and other consultancies
- trade associations and public authorities.

The company's main activities involve comprehensive market analysis, strategic and commercial advice, financial and technical consulting projects, information services and event organisation. With over 40 staff based in the World Heritage City of Bath, Zenith also has regional representation in numerous other countries, including offices in Dubai and New York.



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