



GlobalData Differentiation

August 31

We are here to help support your **GROWTH STRATEGY** as your Strategic Insights Partner





Consumer Products IC – Proposition



	FEATURE	GLOBALDATA
MARKET DATA	Survey Responses	1,000,000 (all years)
	City Level Category	101,817
	Brand Shares	> 108,000
	Innovations Tracked	200,000
	Categories and Segments	941
	Ingredient Profiles	34,456
	SKU Prices Tracked	586,242
ANALYSIS & INSIGHT	Companies	12,500
	News	66,432
	Deals	65,227
	Countries	110
	Cities Covered	3,000
	Analysis Reports	14,541 – All years 2,354 – one year
DISRUPTIVE INNOVATION & THEMATIC RESEARCH	Jobs	599,719
	Influencers	2,367
	Patents	4,440,377
	Themes	Yes

Category Presentations



Global Alcohol Report



Key questions answered:

- What alcohol categories offer the greatest opportunities and where?
- What are the trends driving growth?
- What will the landscape look like in 5 years?

Low/No Alcohol Beer and Beer Mixes

Part 1: Low/No Alcohol Beer and Beer Mixes Success Case Study: Amstel Radler

Amstel successfully leveraged the positive reputation and popularity of its established beer brand to create a low ABV radler that appealed to new consumers seeking a familiar beer with a unique twist.

- | Overview |
|---|
| <ul style="list-style-type: none"> • This radler is a combination of Amstel's beer and lemon water. It contains 2.0% alcohol, and claims to be a great beverage for the after-exercise occasion. • In 2018, it was the fifth largest brand by volume share in the low alcoholic beer category, and second in terms of value share globally. |
| Positioning |
| <ul style="list-style-type: none"> • This radler has offers consumers familiar with Amstel's traditional beer offering with a lighter, lower alcoholic alternative with a flavor twist. • Positioned as a refreshing beverage, the addition of a citrus element such as lemon juice heightens perceived freshness perceptions. • Engages with both traditional Amstel beer drinkers and new customers seeking a "healthier" drink. |
| Key take-outs |
| <ul style="list-style-type: none"> • Successfully capitalized upon the popularity of its traditional beer product and created a new "fresher" alternative. • Appeals to two consumer groups, traditional Amstel beer consumers and those seeking a "fresher" beer alternative with a lower ABV. |



Key questions answered:

- Which markets offer the best opportunities?
- What are the potential white spaces?
- What needs and behaviours could be addressed?

Global Cider Report

Innovation Spotlight: Emerging Cider Flavors

The cider industry is exploring unique flavour profiles that go beyond berries that have dominated innovation over recent years. These experimental options are capturing the attention of younger demographics in developed markets.

 <p>Kopparberg, Cherry Cider</p> <p>Kopparberg's Cherry Cider looks to appeal towards experiential consumers. Similarly, it will stand out in a UK market that is filled with berry variants.</p>	 <p>Buskey Mojito Cider</p> <p>Taps into a demand for hybrid products that can "ease" new consumers into the cider space through familiarity. Also marketed as "light" to complement a trend towards "better for you" alcohol.</p>	 <p>Strongbow, Blossom Rose</p> <p>Blossom Rose uses wine imagery to entice new consumers. There has been a trend of cider producers introducing rose variants, particularly in the UK.</p>	 <p>Frisco Spritz</p> <p>Frisco is marketed as containing a "gentle touch of herbal bitterness". Ciders containing herbs and spices have grown at a CAGR of over 50% between 2014 and 2019.</p>	 <p>Rozie's Pie Rhubarb Cloudy Cider</p> <p>A number of rhubarb cider products have launched in the UK over the review period. Likewise, "cloudy" variants, which are typically sweeter, have also become more prominent.</p>	 <p>Culk Mokal Cactus & Lime</p> <p>The inclusion of cactus and lime creates a "better for you" perception in the mind of consumers. Similarly, the product has a reduced ABV volume to further cement its position as a "light" cider.</p>
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Key questions answered:

- What is the global opportunity in low/no alcohol beer and beer mixes?
- Which markets represent the best opportunities?
- What are the competition doing?

International Expansion



Questions answered

1. Which countries represent the most attractiveness markets for us to enter?
2. What sub-sectors will work best within these markets?
3. What are my Top 10 best market opportunities?

Benefits to clients:

- Make major investment decisions on international expansion based on evidence.
- Understand opportunities based not only on market attractiveness but also existing company assets and capabilities.

Example: International expansion and category diversification strategy

Project DOM Market Attractiveness Index Scorecard & Weighting

Cumulative Weighted Score
Green = Strong Potential
Yellow = Moderate Potential
Red = Low Potential

Country	MCBC Division	Region	Category	Segment	Sub-Segment	Cumulative Weighted Score
Austria	EBL	West Europe	Soft Drinks	Adult Soft Drinks	Adult Soft Drinks	183
Austria	EBL	West Europe	Flavored Alcoholic Beverages	Alcoholic soft drinks	Alcoholic soft drinks	146
Austria	EBL	West Europe	Beer	Beer	Beer	201
Austria	EBL	West Europe	Beer	Beer	Beer - Beer Mies	175
Austria	EBL	West Europe	Beer	Beer	Beer - Craft	192
Austria	EBL	West Europe	Beer	Beer	Beer - Discount	168
Austria	EBL	West Europe	Beer	Beer	Beer - Domestic	203
Austria	EBL	West Europe	Beer	Beer	Beer - Flavoured	176
Austria	EBL	West Europe	Beer	Beer	Beer - Flavoured Beer (beer type)	167
Austria	EBL	West Europe	Beer	Beer	Beer - High Alcohol	173
Austria	EBL	West Europe	Beer	Beer	Beer - Imported	176
Austria	EBL	West Europe	Beer	Beer	Beer - Lager	200
Austria	EBL	West Europe	Beer	Beer	Beer - Licensed	176
Austria	EBL	West Europe	Beer	Beer	Beer - Low Alcohol	171
Austria	EBL	West Europe	Beer	Beer	Beer - Mainstream	202
Austria	EBL	West Europe	Beer	Beer	Beer - Non-Alcoholic	178
Austria	EBL	West Europe	Beer	Beer	Beer - Non-Craft	197
Austria	EBL	West Europe	Beer	Beer	Beer - Non-Lager	179
Austria	EBL	West Europe	Beer	Beer	Beer - Premium	174
Austria	EBL	West Europe	Beer	Beer	Beer - Standard Strength	203
Austria	EBL	West Europe	Beer	Beer	Beer - Superpremium	175
Austria	EBL	West Europe	Beer	Beer	Beer - Unflavoured	199
Austria	EBL	West Europe	Spirits	Brandy	Brandy	168
Austria	EBL	West Europe	Soft Drinks	Carbonates	Carbonates	199
Austria	EBL	West Europe	Soft Drinks	Carbonates	Carbonates - Discount	172
Austria	EBL	West Europe	Soft Drinks	Carbonates	Carbonates - Low Calorie	194
Austria	EBL	West Europe	Soft Drinks	Carbonates	Carbonates - Mainstream	197
Austria	EBL	West Europe	Soft Drinks	Carbonates	Carbonates - Premium	199
Austria	EBL	West Europe	Soft Drinks	Carbonates	Carbonates - Regular	199
Austria	EBL	West Europe	Cider	Cider	Cider	171
Austria	EBL	West Europe	Cider	Cider	Cider - Flavoured Cider (cider type)	194
Austria	EBL	West Europe	Cider	Cider	Cider - Mainstream	170
Austria	EBL	West Europe	Cider	Cider	Cider - Premium	175
Austria	EBL	West Europe	Cider	Cider	Cider - Superpremium	183
Austria	EBL	West Europe	Cider	Cider	Cider - Unflavoured (cider type)	171
Austria	EBL	West Europe	Soft Drinks	Mixers	CocktailMixers	191
Austria	EBL	West Europe	Soft Drinks	Water	Coconut Water	199

Scorecard (Based on scoring criteria in each sheet)

Current Volume (2019)	Current Value (2019)	Value per HL (2019)	Historical Volume Growth	Forecast Volume Growth	Historical Value Growth	Forecast Value Growth
3	5	3	3	4	5	5
6	5	3	12	12	20	15
3	5	6	6	4	10	10
9	15	6	9	12	15	15
6	10	6	9	12	15	15
3	5	6	15	16	25	20
9	10	3	9	12	15	15
9	15	6	9	12	15	15
6	10	6	9	12	15	15
3	5	6	9	12	15	15
3	10	6	9	12	15	15
6	10	6	9	12	15	15
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3	5	6	9	12	20	15
9	10	9	9	12	20	15
3	5	6	12	16	20	20
3	5	6	12	12	15	15
3	5	6	12	12	20	15
3	5	6	15	12	25	15
3	5	6	12	12	15	15
6	5	3	12	12	20	20
3	5	6	12	16	25	20

Title & Notes	Scorecard	Dashboard	Current Volume	Current Value	Value per HL	Historical Vol Growth	Forecast Volume Growth	Historical Val Growth	Forecast Value Growth	Hist Inc Vol	Forecast I
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Channel Opportunities



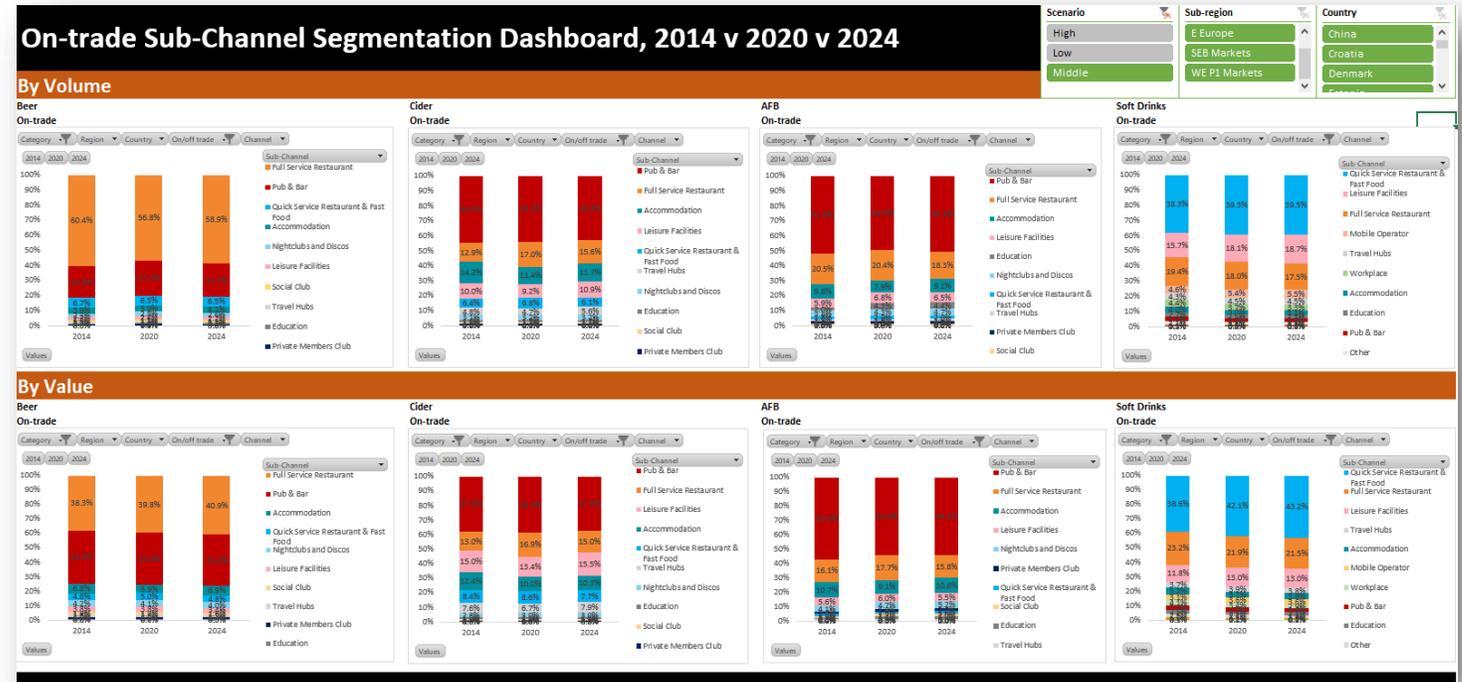
Example: Channel segmentation of beer, cider and soft drinks in 30 countries

Questions answered

1. How can on-trade and off-trade channels be segmented down?
2. How will channels perform in future?
3. How will Covid-19 likely impact on the on-trade over the next 5 years?

Benefits to clients:

- Enables positioning of brands and products towards particular channels.
- Identifies growth opportunities.





Questions answered

1. What consumer trends will impact the future of the food and beverages industry?
2. What impact will trends have on categories, brands, retail and foodservice?
3. How do these trends differ by region?

Benefits to clients:

- Understand your future consumers.
- Forms the basis for innovation.

Example: Future trends in food and beverages

Six Mega-trends

Evolving Lifestyles
Changing demographics, lifestyles and consumption habits.
Gen Z is now the largest demographic group, about 32% of the global population.

Evolving Economies
Shifting global power and influence.
By 2040, Asia is expected to drive 40% of the world's consumption.

Health & Wellness
Consumer awareness and monitoring of holistic wellness.
The Global non-alcoholic beverage market is expected to be worth USD 1,253 billion by 2024.

Sustainability & Ethics
Environmental impact and social responsibility is increasingly important and influential.
69% of consumers globally under 40 are willing to pay more for sustainable products.

Smart & Connected
Technological and digital advancements that increase opportunities to engage.
Global e-commerce sales is forecasted to be 6.4 trillion USD by 2023.

Indulgence & Experience
Added levels of discretion for a heightened consumption and brand experience.
Media that appeals to more than three senses increases brand engagement by 70%.

Trends Framework

- Evolving Lifestyles:** Urbanisation & Cosmopolitanism, Generational Shifts, Polarising Interests.
- Evolving Economies:** Global GDP Slowdown, Globally Local, Shifting Global Influence.
- Sustainability & Ethics:** Environmental Responsibility, Trust & Transparency, Localism.
- Indulgence & Experience:** Sensory & Indulgence, Premiumization & Experience, Personalisation.
- Smart & Connected:** Smart Living, Connected Consumers, Next Generation Shopping.
- Health & Wellness:** Moderation & Avoidance, Holistic Health, Guided Health.

Health & Wellness Summary

Consumers look for brands that help them to achieve their physical, mental and spiritual aspirations for growth. Consumers are becoming more aware of their lifestyle habits, with increasing access to information and ways to track their health and wellbeing.

Trend maturity

Corruption → Emerging → Growth → Maturity → Revival

Sub-trend

Sub-trend	Consumer Behavior	Business Implications
1. Moderation & Avoidance	32% and 33% of consumers are actively trying to reduce their consumption of alcohol and sugary drinks respectively.	<ul style="list-style-type: none"> Major opportunity for growth in low/no alcohol beer and cider, 'adult soft drinks' and low-calorie soft drinks. Channels actively promoting free-from, with devoted retail aisles and even alcohol-free bars.
2. Holistic Health	58% of consumers proactively seek products which improve their health.	<ul style="list-style-type: none"> Functional beverage segments are relatively niche, but are growing fast, including CBD-based drinks, Kombucha and nutraceutical drinks. Such drinks are moving from health food shops to the mainstream – where the big opportunity lies.
3. Guided Health	54% of consumers are highly attentive to product ingredients or marketing claims.	<ul style="list-style-type: none"> Consumers will increasingly use technology to monitor their health. Transparency is essential, providing consumers with the information they need, when they need it.

Coronavirus impact

Accelerate

- Health brought top-of-mind during the Coronavirus pandemic.
- Increased concern about hygiene in terms of packaging and ingredients.
- Online understanding of how social interactions contribute to overall wellness and mental health.

Health & Wellness Category Impact

Health-conscious consumers are increasingly conscious of physical and mental health, and actively seek functional benefits from food and drinks. Functional drinks like kombucha, CBD drinks, low/no alcohol alternatives, and other nutraceutical drinks have emerged to meet these demands.

- ▶ Around a third of all consumers globally are actively trying to reduce alcohol and sugary drinks consumption.
- ▶ Consumers are demanding clean ingredients that provide both physical and mental wellbeing – increased mental clarity, more energy, improved athletic performance, better mood and lower stress.
- ▶ Low/no alcoholic beverages, adult soft drinks and low-calorie soft drinks appear attractive for an industry faced with widespread moderation and avoidance behaviour among consumers.
- ▶ Low/no alcohol beer needs to be a vital focus due to global rapid growth, with 2.1 BL sold in 2019 at a value of 7.1 B Euros.

Low/No Alcohol Beer

2.1 BL in 2019
7.2% Vol CAGR (vs 0.2% total beer)
7.6% Vol CAGR (vs 2.9% total beer)

Kombucha

153 ML / €357m in 2019
38% Vol CAGR
19% Val CAGR

Nutraceutical Drinks

799 ML / €1.3 Bn in 2019
3.6% Vol CAGR
5.2% Val CAGR

Low Calorie Soft Drinks

545 ML / €80 Bn in 2019
1.8% Vol CAGR vs 0.1% (vs reg soft)
5.2% Val CAGR vs 2.7% (vs reg soft)



Tracking Flavour and Ingredient Innovations

Consumer Survey Insights: Ingredient Appeal

The popularity of functional health and energizing ingredients can be linked to lifestyle changes during the COVID-19 pandemic

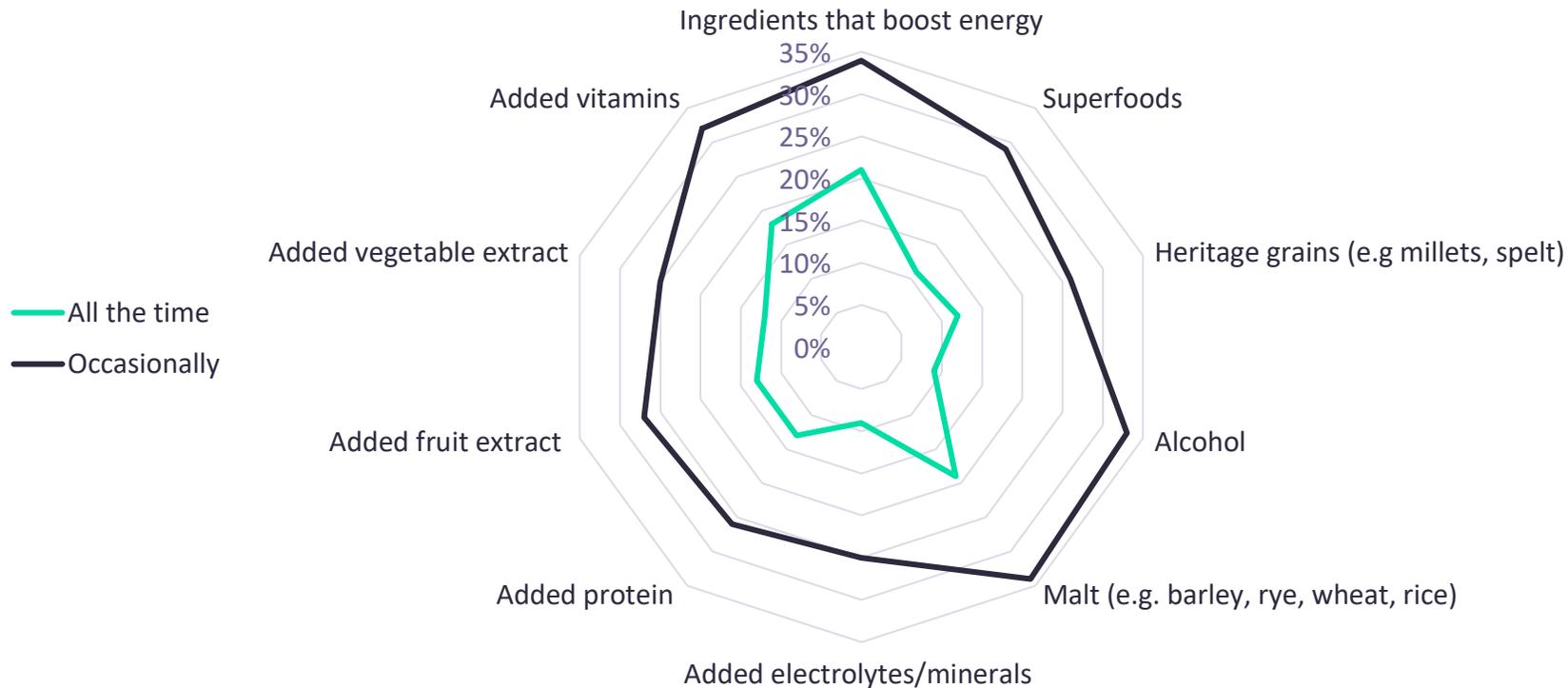


Introduction

Ingredient Appeal

Take-outs

Global: "How often do you buy food/drink products with the following ingredients?", 2021



Lifestyle changes during COVID-19 has heightened attention on health benefits

Over half (55%) of global consumers buy ingredients that boost energy, such as caffeine and guarana either "all the time" or "occasionally." This may be attributed to increased consciousness of the benefits for mental performance, especially given the drastic lifestyle changes resulting from the COVID-19 pandemic, such as working from home. Many people have found more time to cook from scratch and invest time in eating healthier foods as a result of working from home. Since the outbreak of the pandemic, reduced social occasions and movement outdoors has prompted the World Health Organization (WHO) to promote the consumption of vegetables, fruit, pulses, and wholegrain foods in all meals.² Popularity around malt and other cereal grain ingredients can therefore be linked to an increased focus on healthier eating.

Consumer Survey Insights: Ingredient Appeal

Flavor combinations have been especially innovative in yogurts

Four interesting innovations in dairy



Innovation snapshot

Featured flavors

Featured claims

Featured ingredient

Featured packaging



Spar Natur Pur's herb garden organic yogurt, Austria

Why is it innovative?

Formulation: This herb garden variety of organic yogurt from Natur Pur is formulated with 'wiesenmilch', a.k.a meadowmilk. This is milk from cows with access to fresh grass, sun, air, and sufficient space. This taps into trends around purity, ethical consumption and natural positioning.



M&S Food Collection's strawberry clotted cream, UK

Why is it innovative?

Formulation: This launch is the first potted combination of strawberry and clotted cream, reminiscent of the traditional British snack of strawberries and cream with scones. The dairy is sourced from Jersey and Guernsey which taps into localism trends.



Yili Changqin's rose and lychee yogurt, China

Why is it innovative?

Formulation: This product is formulated with lychee and rose jam, as well as Danish lactic acid bacteria. It is also high in fiber. This is a more indulgent and unusual flavor and will appeal to consumers who are looking for a novel flavor combinations.



Ehrmann Almighurt's grape and nut yogurt, Germany

Why is it innovative?

Formulation: In Germany, a grape and nut flavored yogurt was launched. The brand specifically displays that it is formulated using milk from the Allgau. Allgau is a region in Swabia in southern Germany, and the claim establishes its local ties, as well as transparency to German consumers.

Healthy, simple and natural claims helps make post pandemic audiences feel at ease



Featured claims in yogurt and yogurt drink

Innovation snapshot

Featured flavors

Featured claims

Featured ingredient

Featured packaging

Simple, Natural and Pure – The packaging should ideally also match

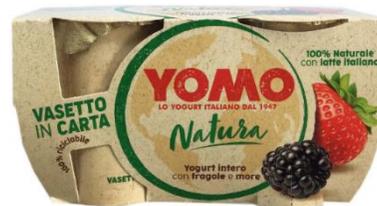
Shoppers are looking for healthy, and natural products. 35% of consumer said that the claim 'contains natural ingredients' would most encourage them to buy a food/drink product.²

Both product examples given here have one thing in common: their packaging enhances their positioning. This is key to inform the consumer what benefits a product has with simply just the shelf presence. For example, one way to establish natural positioning is by ensuring the packaging is environmentally friendly. In fact, 38% of consumers believe that the environmental footprint of products is now more important as a result of the COVID-19 pandemic, and 13% said this was their top priority.³ Claims surrounding purity and naturalness lends itself well to packaging considerations.



Vorarlberg Milch's mango yogurt drink, Austria

Recently in Austria, a mango drinking yogurt was launched claiming to only contain 1% fat and is describes as an ideal small snack. The simplicity of the packaging helps underscore the lean fat percentage. Around 4 in 10 consumers (43%) globally say that they are actively trying to reduce their consumption of fats.¹



Yomo Natura's 'whole' yogurt with strawberry and blackberry, Italy

Available in a 100% recyclable paperboard cup, this yogurt with strawberry and blackberry variant is marketed to have been "made with Italian milk, selected natural ingredients and brown sugar". The raw look of the packaging supports the natural positioning of the product.

Highlighted unusual claim

Packed with vitamins



Ehrmann High Vitamin blood orange yogurt, Germany

This product advertises that it can provide 50% of the daily recommended vitamins by providing vitamin C, D, B6, B9, B12, and the mineral magnesium. It is free from added sugar and lactose, as well as low in fat.

Innovation Update Q4 2020: Dairy

Milk protein as a highlighted ingredient has penetrated most dairy categories



Featured ingredient: Milk protein



Powered by protein

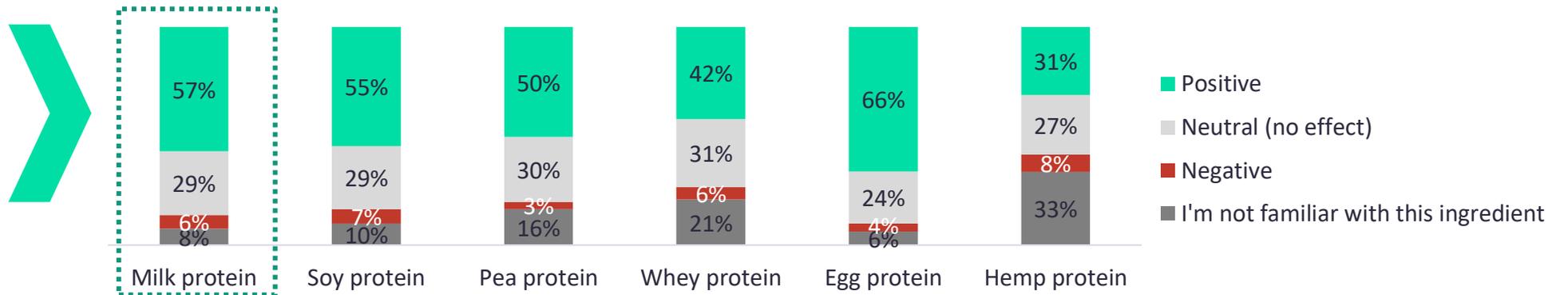
Brands have launched many innovative dairy products with high protein content, especially across Europe. These dairy innovations span across several segments, from cottage cheese and kefir to coffee milk and yogurt.

They also tap into ongoing health and wellness trends due to the overall positive health connotation that protein has. More than half of the global population believe that milk protein has a positive effect on the body¹.

Innovation Examples

<p>Oh!'s high protein Cottage Cheese Switzerland</p> 	<p>Ehrmann's high protein kefir Germany</p> 	<p>Eat lean's high protein cheese UK</p> 	<p>M&S Food High Protein's high protein coffee milk UK</p> 	<p>Spar High Protein's organic Skyr Austria</p> 
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Do you think the following ingredients will have a positive or negative impact on your health?¹



Tapping into sustainable and interactive packaging trends



Featured packaging: Yeo Valley Organic super thick kernald yogurt

Innovation snapshot

Featured flavors

Featured claims

Featured ingredient

Featured packaging

Description

- Super thick, kernald, strained natural yogurt with 5% fat content. Marketed as "high in protein, low in sugar." The product is packaged in 100% recycled PET.

Innovation features

- Introduction of a 100% recycled PET sleeved pot to the UK yogurt market.
- Each pack carries 15 Yeokens, a "digital currency" that can be redeemed for freebies, discounts, and events or donated to charity.

Product details

- Country found : **United Kingdom**
- Manufacturer/distributor: **Yeo Valley Organic**
- Retail price : **2.75 GBP**

Benefits/commentary

- The plastics pot and its lid are both made from 100% recycled PET. The outer sleeve is also produced from recycled board. The use of recycled materials is communicated on the pack sending a clear sustainability message that is likely to appeal to eco-conscious consumers.
- Board outer sleeve features a tear-strip at one side to allow easy separation of the packaging components for recycling purposes. Only the lidding film cannot currently be recycled in the UK.
- The reverse face of the board sleeve is fully utilized for branding purposes. It features an explanation of kerning and how the yogurt is made, as well as instructions for redeeming the Yeokens code.
- The reverse face of the lidding membrane is also used for the brand's Yeokens promotion and is over-printed with a code that can be redeemed online for Yeokens.



Pack dimensions:

Width: 120mm

Height: 88mm

Depth: 120mm

Weight: 450g

Honey: a natural sweetener can enhance the appeal of chocolate and confectionery



Featured ingredient: Honey

Innovation snapshot

Featured flavors

Featured claims

Featured ingredient

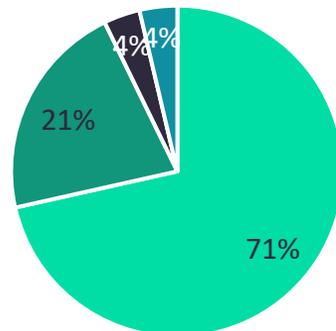
Featured packaging

Consumers worldwide have a positive health association with honey

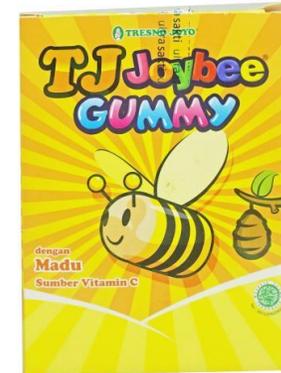
Honey, known for its home remedies (e.g. treating coughs and colds etc.), and has often has the “100% natural” claim attached to it as it is not man-made.¹ This fact poses an opportunity for brands to have honey as the central ingredient for a sugar alternative, as it gives a stronger association to healthy eating than sugar.

In fact, according to GlobalData’s primary research, the majority of consumers globally (71%) find that honey has a positive effect on their health². This demonstrates honey’s strong value proposition in the product formulation. Though there are risks to honey due to high sugar content (e.g. tooth decay)¹, if honey is carefully included in the formulation, where sugar levels are not too high, it can become a beneficial addition to the product strategy and will be especially appropriate for targeting health-concerned consumers.

Global: Do you think the following ingredients will have a positive or negative impact on your health? – Honey, 2019²



- Positive
- Neutral (no effect)
- Negative
- I'm not familiar with this ingredient



PT Yupi Indo honey flavored gummies, Indonesia

This honey-flavored confectionery product is made particularly for children. Its claim to be a source of vitamin C would interest shoppers who wish to improve the intake of nutrients for their kids through more palatable and child-lovable formats like gummies.



Ritter Sport honey nut and yogurt chocolate, Russia and Austria

This chocolate brings an unusual flavor to the category. Its green packaging gives the natural feel the product and using ingredients that are known for their health remedy gives the product the opportunity to target health-concerned consumers as well as adventurous ones.

Innovation Update Q4 2020: Chocolates, Confectionery, and Desserts



CENTRAL & SOUTH AMERICA

Bogota
Calle 71,
No 5-23 Suite 501 D
+571 3470749

Buenos Aires
Basavibaso 1328, 2nd Floor
Off 206, Buenos Aires
1006 CA, Argentina
+54 11 4311 5874

Mexico City
Mote Pelvoux 111-2 Piso
Lomas de Chapultepec
Mexico D.F, 11000
+52 55 5284 2945

AUSTRALIA

Melbourne
Suite 1608
Exchange Tower ,
Business Centre
530 Little Collins Street
3000, Victoria
+61 3 9909 7757
+61 3 9909 7759

Sydney
Suite 602, level 6
45 Clarence St
Sydney 2000
+61 2 8076 8815

NORTH AMERICA

Boston
41 Farnsworth St,
MA 02210, USA
+1 781 762 9450

New York
441 Lexington Avenue,
NY 10017, USA
+1 646 395 5460

San Francisco
425 California Street,
Suite 1300
CA 94104, USA
+1 415 800 0336

Toronto
530 Richmond St West
Suite 300
M5V 1Y4, Ontario, Canada
+1 703 788 3592

Virginia
9870 Main Street, Fairfax,
Virginia 22031, USA
Toll-free in USA:
+1 888 777 9940
Direct: +1 703 383 4903
Fax: +1 703 383 4905

EUROPE

London
John Carpenter House
7 Carmelite Street
EC4Y 0BS, UK
+44 207 936 6400

Basingstoke
4th Floor, Northern Cross
Basing View, Hampshire
RG21 4EB, UK
+44 1256 394200

Hull
Shirethorn House
37-43 Prospect Street
HU2 8PX, UK

Manchester
Churchgate House
M1 6EU, UK
+44 161 359 5813

Madrid
C/Jesusa Lara,
29 - Atico J,
28250 Torreldones,
Spain
+34 91 859 4886

Paris
Les Bureaux de Sevres
2, rue Troyon
92316 Sevres, France

ASIA

Beijing
Room 2301 Bulding 4
Wanda Plaza,
No 93 Jianguo Road
Chaoyang District
Beijing 100026, PR China
+ 86 10 6581 1794
+86 10 5820 4077

Hyderabad
KRISHE SAPPHERE,
MSR Block, 3rd Floor,
Madhapur,
Hyderabad-500081,
Telangana, India
+91 40 6616 6700

Hong Kong
1008 Shatin Galleria
18-24 Shan Mei Street
Fo Tan, New Territories
Hong Kong S.A.R
+852 2690 5200
+852 2690 5230

Seoul
24th floor, City Air Tower,
Teheranro 87gil
36, Samsung Dong,
Gangnam Gu,
Republic Of Korea
(Postcode 06164)
T: +82 2 2016 6070
M: +82 10 8976 2437
F: +82 2 2016 5411

Shanghai

Yueshang Plaza
1 South Wuning Road
Jing'an District
Shanghai, 31, 200042
Floor : 12th , Room #
128
+86 21 5157 2275(6)

Singapore

50, Raffles Place
Unit 38-04A
Singapore Land Tower
048623
+65 6383 4688
+65 6383 5433

Tokyo

Level 3,
Sanno Park Tower,
2-11-1 Nagata-cho,
Chiyoda-ku,
Tokyo, 100-616, Japan
T: +81 3 6205 3511
F: +81 3 6205 3521

MIDDLE EAST

Dubai

Dubai Media City
Building 7, Floor 3,
Office 308
PO Box 502635
United Arab Emirates
+971 4391 3049

Thank you!