

NÜTRL ON PREMISE TOOLKIT



Chapter 1: On Premise Opportunity

High Level Category Insights and On-Premise Opportunity

Audience: Internal AB, WSLR Leadership & National Chain Account Buyers

Chapter 2: Execution & Mega Platforms

Strategy to drive NÜTRL ROS & Distro w/Mega Platforms & Local Brand Plans

Audience: Internal AB, WSLR Leadership + Front Line Reps

Chapter 3: NÜTRL Playbook

Reasons to Believe, Insights & Guide to Crack Non-buys.

Audience: Internal AB, WSLR Leadership + Front Line Reps



NÜTRL ON PREMISE TOOLKIT



1

**ON PREMISE
OPPORTUNITY**

2

**EXECUTION PRIORITIES &
MEGA PLATFORMS**

3

**NÜTRL SELLING
PLAYBOOK**



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PLAYBOOK**





**WHY THE
ON PREMISE
IS SUCH A
CRITICAL
CHANNEL
TO WIN FOR
NÜTRL...**

BRANDS ARE BUILT IN THE ON PREMISE!

MONDAY FEBRUARY 10TH

ON PREMISE EXPECTING SPENDING BOOST THIS YEAR:

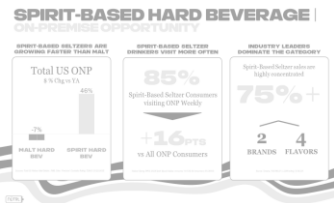
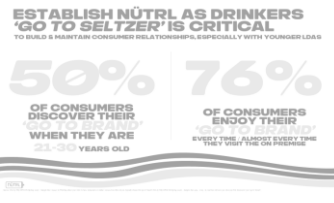
CGA's On Premise Impact Report reflects broader consumer optimism to kick off the year, "*with almost two thirds (65%) of consumers expressing a positive outlook for 2025,*" up +7 percentage points from August 2024.

ALMOST TWO-THIRDS OF CONSUMERS PLAN TO REORDER BRANDS TRIED IN THE ON-PREM.

Emphasizing just how important the on-premise is to consumer engagement and trail, the report notes that when consumers try a new drink in a venues "almost two thirds (63%) are likely to order it again during subsequent visits." Then too, 60% of consumers "actively seek it out for home consumption" while half will "make in-store purchases of brands they first tried when out."

EXECUTIVE SUMMARY:

ON PREMISE OPPORTUNITY

TOPIC	KEY INSIGHTS AND RTBS	SUPPORT MATERIAL
HARD BEVERAGES ON-PREMISE INDUSTRY	Hard Beverages are a \$3.3 Billion Dollar On-Premise Industry¹ Hard Beverages grew +\$254 Million Year over Year in the On-Premise¹	
SPIRIT-BASED SELTZER OPPORTUNITY	Sprit Based Seltzer Drinkers VISIT MORE, SPEND MORE & Recruits the Key 21-34 Y/O Demographic in the On Premise Offers Trade Up Opportunity for retailers to capture Incremental \$\$\$. Avg Spirit Seltzer PTC is 39% higher vs Malt Seltzer.	
NÜTRL ON PREMISE OPPORTUNITY	Establish NÜTRL as the ‘Go To Seltzer’ for the younger LDAs in the On Premise as only 28% of Seltzer Drinkers have a ‘go to brand’. 50% of drinkers establish ‘Go To’ Brand from 21-35 years old, while 76% of drinkers enjoy their ‘Go To’ Brand every time they visit the On Premise.	
WHY NÜTRL?	NÜTRL drinkers are nearly 2.5x more likely to go out to bars and clubs than any other alcohol buyer. NUTRL is the #2 Spirit Based Seltzer Brand in the On Premise and continues to grow cultural relevance with partners like Live Nation & Bussin’ with the Boys	

HARD BEVERAGES ARE A GROWTH ENGINE FOR THE ON PREMISE

**HARD BEVERAGES ARE WORTH
\$3.3 BILLION**
ON-PREM MARKET SIZE

+\$254 MILLION
ON-PREM MARKET GROWTH YOY

PREMIUMIZATION
DRIVEN VIA SPIRIT-BASED SEGMENTS



SPIRIT-BASED HARD BEVERAGE |

ON-PREMISE OPPORTUNITY

SPIRIT-BASED CONTRIBUTION TO GROWTH



100%

of ONP Hard Beverage
\$ **Growth** came from
Spirit-Based items
L52W

Nielsen OPM 52WE 03/22/2025

SPIRIT-BASED HARD BEV APPEALS TO KEY DEMO

Spirit-Based Hard Bev
Drinkers Are

21-34



190 INDEX

vs Avg Consumer

CGA Spring OPUS 2025: Category Drinkers: RTD, Sample 726 vs All Consumers, Sample 15001

KEY DEMO PROMOTES FREQUENCY & SPEND

21-34 visit ONP weekly

1.6X

More vs Avg Consumer



50% of 21-34 YOs consume

3+

Hard Beverages per visit

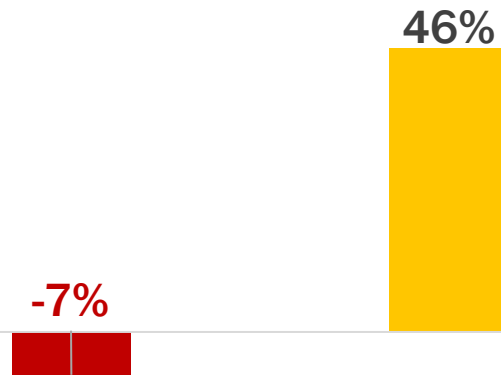
Source: CGA Spring OPUS 2025, Age Band 21-34 vs Avg Consumer, n= 3800, 15k, % drinking out weekly.
Source: Nielsen Spring OPUS 2025, Q: Number of drinks consumed during most recent drink led visit N=3416

SPIRIT-BASED HARD BEVERAGE | ON-PREMISE OPPORTUNITY

SPIRIT-BASED HARD BEVS ARE GROWING FASTER THAN MALT

Total US ONP

\$ % Chg vs YA



**MALT HARD
BEV**

**SPIRIT HARD
BEV**

Sources: Total US Nielsen Malt Seltzer, FMB, Cider, Premixed Cocktails Rolling 52W/E 03.22.2025

SPIRIT-BASED SELTZER DRINKERS VISIT MORE OFTEN

85%

Spirit-Based Seltzer Consumers
visiting ONP Weekly

+16PTS

vs All ONP Consumers

Nielsen Spring OPUS 2025 Spirit Based Seltzer consumer N=726; All consumers N=15003

INDUSTRY LEADERS DOMINATE THE CATEGORY

Spirit-Based Seltzer sales are
highly concentrated

75%+

2

BRANDS

4

FLAVORS

Source: Circana, TUS MULC+, L13W ending 5/25/25

SPIRIT-BASED SELTZER |

TRADE UP OPPORTUNITY

CONSUMER WILLINGNESS TO TRADE UP = INCREMENTAL \$ FOR RETAILERS

**SPIRIT-BASED SELTZER GENERATES
1.3X MORE \$\$ PER SERVE**

TUS Avg PTC 120z

\$8.79



Spirit Seltzer



\$6.32

Malt Seltzer

Nielsen ONP Seltzer Category Avg Price W/E 03/22/2025 03/22/2025 (High Noon and NÜTRL as Spirit Based Seltzer)

**CONSUMERS ARE LOOKING FOR
MORE PREMIUM OPTIONS**

74%



of consumers are
willing to buy more
premium products



SOURCE: Nielsen SPRING OPUS 2025, Q: likelihood to pay extra for a better quality drink, Quite likely/very likely respondents N=726

ESTABLISHING NÜTRL AS DRINKERS 'GO TO SELTZER' IS CRITICAL

TO BUILD & MAINTAIN CONSUMER RELATIONSHIPS, ESPECIALLY WITH YOUNGER LDAS

50%

OF CONSUMERS
DISCOVER THEIR
'GO TO BRAND'
WHEN THEY ARE
21-30 YEARS OLD

76%

OF CONSUMERS
ENJOY THEIR
'GO TO BRAND'
EVERY TIME / ALMOST EVERY TIME
THEY VISIT THE ON PREMISE



SELTZER CATEGORY IS UNDER-DEVELOPED WITH A 'GO TO BRAND'

VS OTHER ALCOHOL CATEGORIES

% of category drinkers that have a 'go-to' brand in that category

28%

**OF HARD SELTZER/RTD
CONSUMERS HAVE A
'GO TO BRAND'**



BEER

62%



VODKA

57%



WHISKEY

53%



WINE

46%

NÜTRL CONTINUES TO DRIVE SALES IN THE ON PREMISE

#2

Spirits Seltzer

+39%

vs YA

Larger
than the next
FIVE
competitors
COMBINED



GROWING NÜTRL DISTRIBUTION & SAMPLING CONSUMERS

IS THE UNLOCK TO CONVERTING CONSUMERS TO NÜTRL DRINKERS

39%

OF CONSUMERS HAVE
TRIED A **NEW DRINK**
WHEN IN THE ON
PREMISE



FOR NÜTRL DRINKERS GOING OUT IS A LIFESTYLE

NÜTRL drinkers are nearly

2.5X

more likely to **go out to bars and clubs**
than any other alcohol buyer

NÜTRL SEPARATES FROM COMPETITION WITH OUR TASTE



Keep It Tasty.



RollingStone



RS RECOMMENDS | The 2024 Rolling Stone Spirits Awards

BEST VODKA SELTZER

NÜTRL Vodka Seltzer

► SHOP NÜTRL



NÜTRL

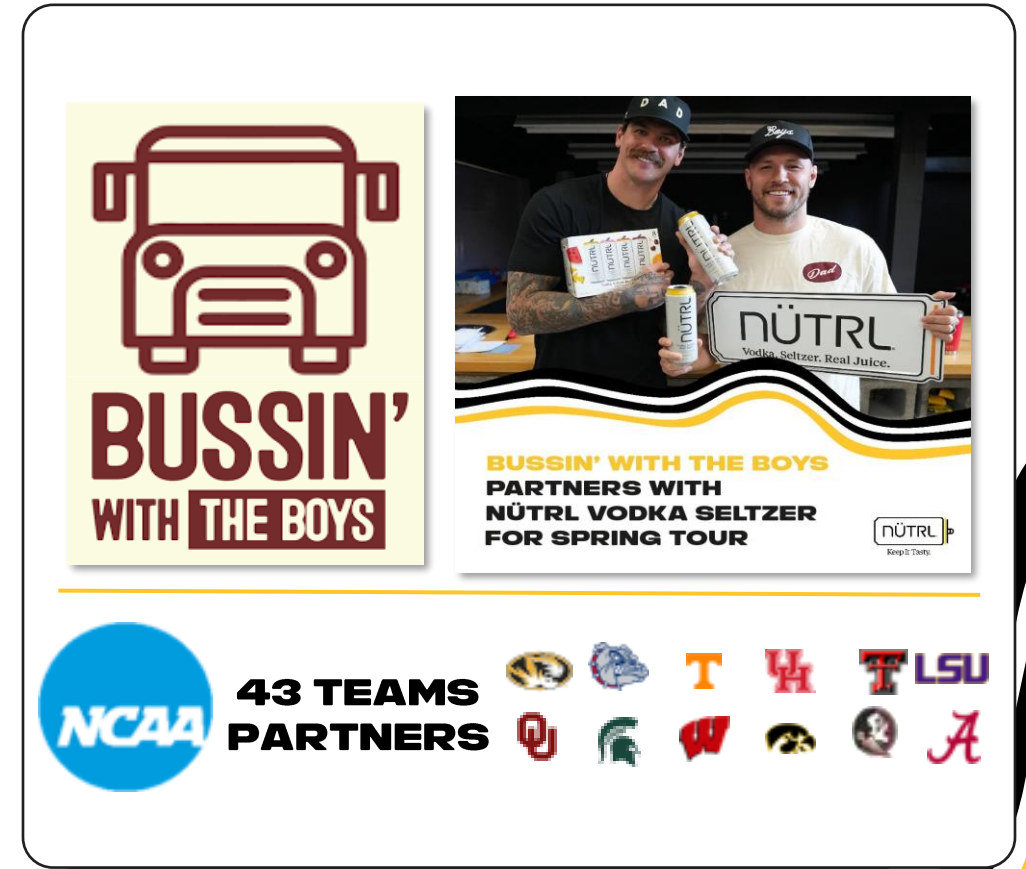
Looking for a way to replace your standard summer bar order? Nütrl's vodka-based (rather than malt-based) seltzer feels like a club cocktail you could serve in a red solo cup, or in an ice-filled tasting glass — and we mean this in the best way possible. Focusing on simple vodka, blended with sparkling water and real fruit juice, these seltzers smell and taste remarkably flavorful (especially the pineapple and watermelon). It's great when you're looking for a drink that doesn't just taste like a hint of a hint of a hint of fruit.

NÜTRL CONTINUES TO INVEST IN MUSIC & COLLEGE TO GROW BRAND AWARENESS

MUSIC PARTNERS



COLLEGE



NÜTRL ON PREMISE TOOLKIT



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**NÜTRL SELLING
PLAYBOOK**



EXECUTIVE SUMMARY |

WINING THE ON PREMISE & EXECUTION PRIORITIES

GUIDELINES	KEY INSIGHTS AND RTBS	EXECUTION PRIORITIES
 Targeted Distribution:	Prioritize ‘B’ Light Lager Accounts to grow Simple Distribution Use local expertise to attack high energy sports bars, patios, rooftops, venues, etc.	Indy “B” Accounts Must Have: Distribution in high energy accounts  ✓ High Energy ✓ Sports, Music & Socializing ✓ Patios, Rooftops, etc.
 Assortment:	Pineapple, Watermelon & Orange are the main priorities for NÜTRL Lean in Strategic Flavor Innovations: Strawberry, Lime, Black Cherry	Grow MPD: Expand: Pineapple & Watermelon Lean Into CITURS: NÜTRL Orange & Lime 
 Features & Menu Placements:	When deciding what to order - 37% of customers review the menu & 26% look at features/specials. 45% of 21-25 year are influenced by Bucket Features for Spirit-Based Seltzers in the On Premise	Menu & Features Must Have: NÜTRL Printed on Menu with Bucket Feature  Buckets Table Tents
 Account Execution:	39% of consumer have tried a ‘NEW’ drink in the On Premise & only 28% of drinkers have a ‘GO TO SELTZER’ It is critical that we out execute competition how nÜtrl shows up at the account to gain exposure & trial	Staff Education & Disruptive POCM Must Have: Staff Education, Samples & POCM  Server Cards Local Signage



PRIORITIZE 'B' INDY ONP ACCOUNTS ALREADY SELLING AMERICAN LAGERS

GUIDELINES



Targeted
Distribution:



Assortment:



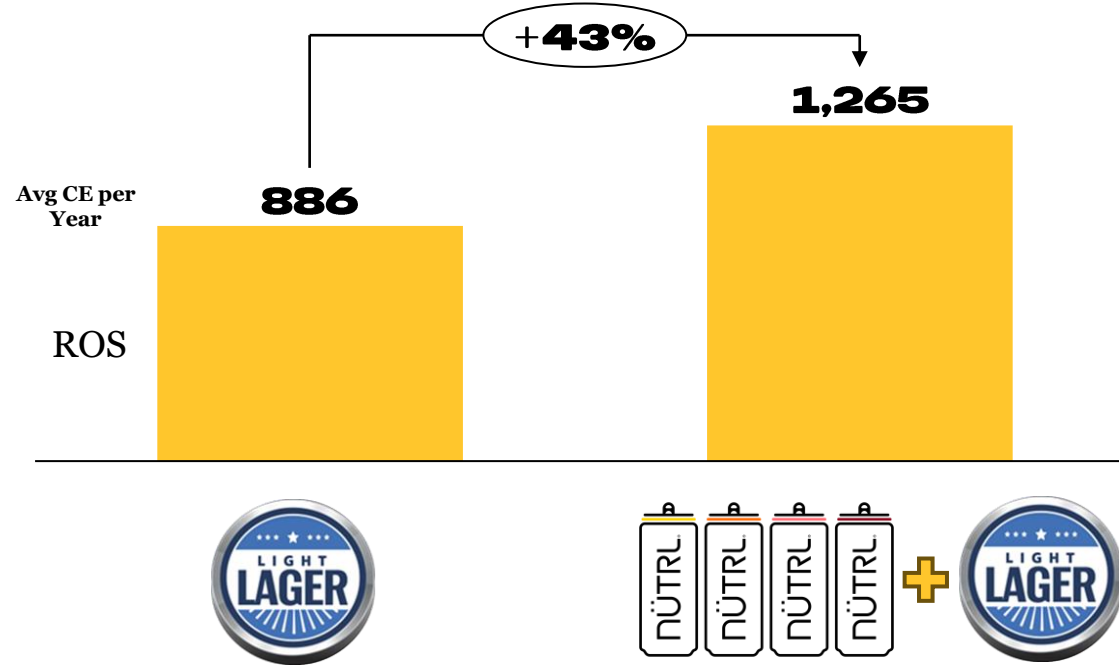
Features &
Menu
Placements:



Account
Execution:

KEY INSIGHTS AND RTBS

'B' Accounts that Sell American Lagers & NÜTRL have an average ROS that is +43% greater than those that don't Sell NÜTRL



EXECUTION ASK

Close Out 'B' INDY Accounts
selling American Lagers
to grow
NÜTRL Distribution

Rationale:

High Demo Overlap with
American Lager & NÜTRL
Drinkers

+

Strong Existing Relationships
with 'B' Accounts



NÜTRL : FLAVOR ASSORTMENT

GUIDELINES



Targeted
Distribution:



Assortment:



Features &
Menu
Placements:



Account
Execution:

KEY INSIGHTS AND RTBS

Top 4 Spirit Seltzer Flavors = 75% the Volume

Pineapple



#1

Peach



#2

Watermelon



#3

Orange



#4

**NÜTRL 4-Packs Assortment is designed for
Top Selling & Unique Flavors**

TOP SELLERS



UNIQUE OFFERINGS



EXECUTION ASK

INDY: Grow MPD with 4pks

SKU PRIORITIES



Venues: 16oz/720mL Singles

720ML & 16oz will all be Standard Lids Q3 of 2025



CARRYING MULTIPLE FLAVOR IS ESSENTIAL TO MEET CONSUMER NEEDS

WIDE FLAVOR ASSORTMENT IS CRITICAL TO MEET CONSUMER NEEDS

#1

**INFLUENCE FOR SPIRIT BASED
SELTZER DRINKERS IS THE
RANGE OF FLAVORS
AVAILABLE
IN AN ONP SETTING**

Source: Nielsen Spring OPUS 2025 N=630 Q: Influences to drink canned/bottled flavored alcoholic beverages

**ACTION: EXPAND CONSUMER REACH
WITH OFFERING MULTIPLE FLAVORS**

**BUCKET FEATURES
ALLOW FOR FLAVOR
EXPLORATION & TRIAL**

**MIX'N'MATCH
NÜTRL BUCKETS
\$XX
FOR 5 NÜTRLS**



NÜTRL: MENU CALLOUTS & FEATURES ARE KEY TO INCREASING BRAND AWARENESS

GUIDELINES

 Targeted Distribution:

 Assortment:

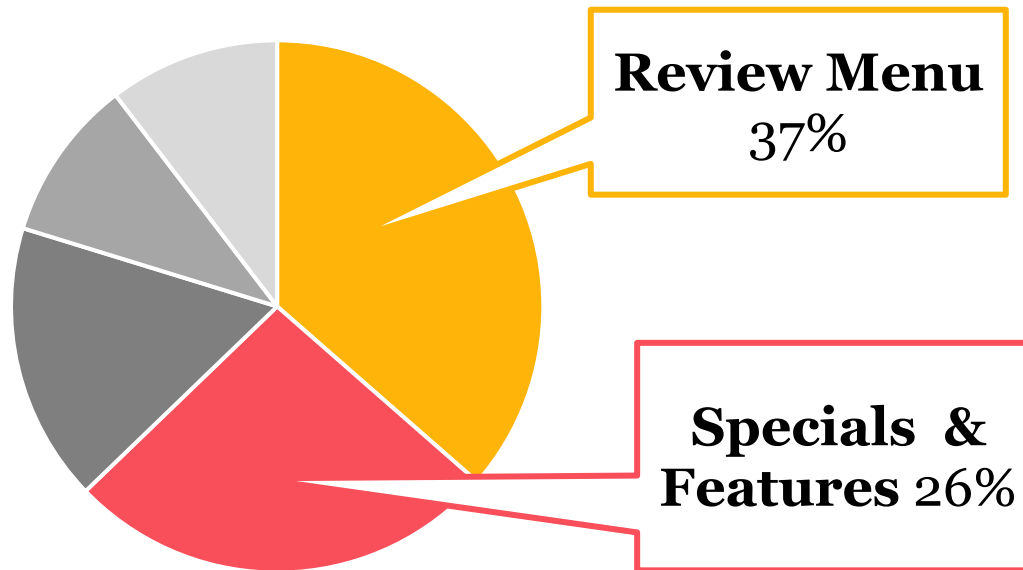
 Features & Menu Placements:

 Account Execution:

KEY INSIGHTS AND RTBS

63%

of Consumers Review the Menu or Features When Deciding What Alcoholic Beverage to Order



EXECUTION ASK

- 1) NÜTRL Printed on the Drink Menu – DRIVE AWARENESS
- 2) NÜTRL Features: Bucket Specials are top priority
- 3) Staff Training utilizing Samples & NÜTRL Server Cards



IMPORTANCE OF BUCKET FEATURES

BUCKETS ENCOURAGE SOCIAL OCCASIONS WITH GROUPS

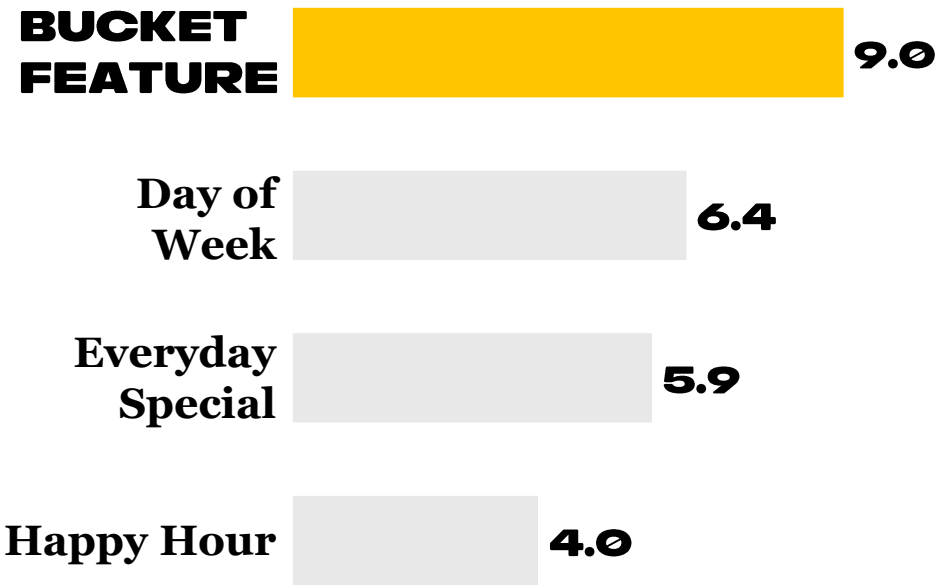
% of Age Group Purchasing Pitchers/Buckets

21-34 Y/O	54%
35-54 Y/O	42%

Lean into Younger Consumer Over indexing with Bucket Purchases

BUCKET FEATURES ARE #1 ROS FEATURE IN NÜTRL HOT ZONE ACCOUNTS

HOT ZONE ROS | FEATURE ANALYSIS



EXECUTIVE SUMMARY |

WINING THE ON PREMISE & EXECUTION PRIORITIES

GUIDELINES



Targeted
Distribution:



Assortment:



Features &
Menu
Placements:



Account
Execution:

PERFECT ACCOUNT EXECUTION CHECK LIST

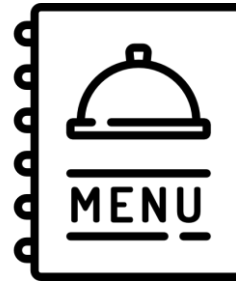
1: DISTRIBUTION

Prioritize Indy 'B'
Accounts



2: MENU EXECUTION

Printed on Menu



3: PRICING CALLOUTS

Drive Awareness



4: FEATURES

Bucket Features
#1 Priority



5: ACTIVATIONS

Liquid to Lips



6: DISRUPTIVE EXECUTION

Drive Awareness



7: STAFF EDUCATION

Set Up a Staff
Training



8: SOCIAL MEDIA POSTS

Drive Awareness



PERFECT ACCOUNT LIST VISUAL

INSIDE



- 1 Buckets
- 2 Feature Signage
- 3 NÜTRL Neon
- 4 Bar Mats
- 5 Coasters
- 6 Table Tents

OUTSIDE



- 1 Umbrellas
- 2 A-Frame w/ feature
- 3 Tin Tackers
- 4 Buckets
- 5 Napkin Caddy
- 6 Table Tents

MEGA PLATFORMS



2025 BRAND CALENDAR

JAN

FEB

MAR

APR

MAY

JUN

JUL

AUG

SEP

OCT

NOV

DEC

**EQUITY
CAMPAIGN**

**CAMPAIGN
LAUNCH**

Keep It Tasty

**MEGA
PLATFORM
PROGRAM**

**MARCH TO
SPRING BREAK**

**SUMMER MUSIC
SEASON**

**COLLEGE
KICK OFF**

**HOLIDAY
PARTY
SEASON**

**RETAIL
PROGRAM**



PARTNERS

LIVE NATION **ticketmaster** **VEEPS**

popchips

INNOVATION



Lime
4-PK



Strawberry
4-PK



Orange
720ML



Pineapple
160z



Orange
160z



Fruit VP 12pk –
National Expansion

COLLEGE MARKETS





40+

**SPONSORED
SCHOOLS**



5300+

**COLLEGES IN
THE US**



9.9M

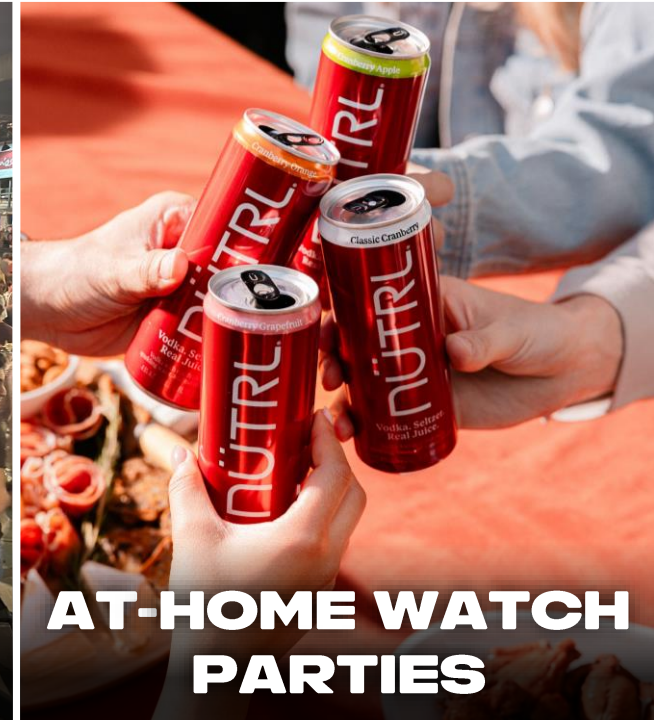
**VIEWERS PER
GAME**



154

BILLION

**MINUTES
WATCHED**



A map of the Northeast United States, including Maine (ME), New Hampshire (NH), Vermont (VT), Massachusetts (MA), New York (NY), Pennsylvania (PA), New Jersey (NJ), Delaware (DE), Maryland (MD), Connecticut (CT), and Rhode Island (RI). A large, stylized red 'M' logo with a yellow outline is positioned in the lower-left corner, partially overlapping the map. A thick, wavy black line runs diagonally across the right side of the page, and a thick yellow line runs diagonally across the top right corner.

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COLLEGE MARKETS

COMMERCIAL PROGRAM EXECUTION AMPLIFIED BY PARTNERSHIPS

REACH

FOUNDATIONAL
PROGRAMMING



ENGAGEMENT

NÜTRL
Hot Zones
COLLEGE
MARKETS
SPRING / FALL



CONVERSION



Win instant Venmo to make all of your college moments with friends "tastier"

PARTNERS



BUSSIN'
WITH THE BOYS
A
AthletesFirst



COLLEGE MARKETS

ON PREMISE ACTIVATIONS

PROGRAM OVERVIEW

NÜTRL is here to make Spring College occasions tastier.
From March Hoops to St. Pats, we'll show up across each selling moment.

EXECUTION ELEMENTS



Asset kits with PPG
for each moment.



Team-specific POCM

ALWAYS-ON HOOK

Win \$1000 instantly to enjoy Spring
College moments!



SCAN: Scan QR Code or follow link in Social Bio's
PLAY: Play scratch-off game to instant win
WIN: Link Venmo or Paypal account for payout

ACTIVATION



Hat press for localized
thematic giveaways

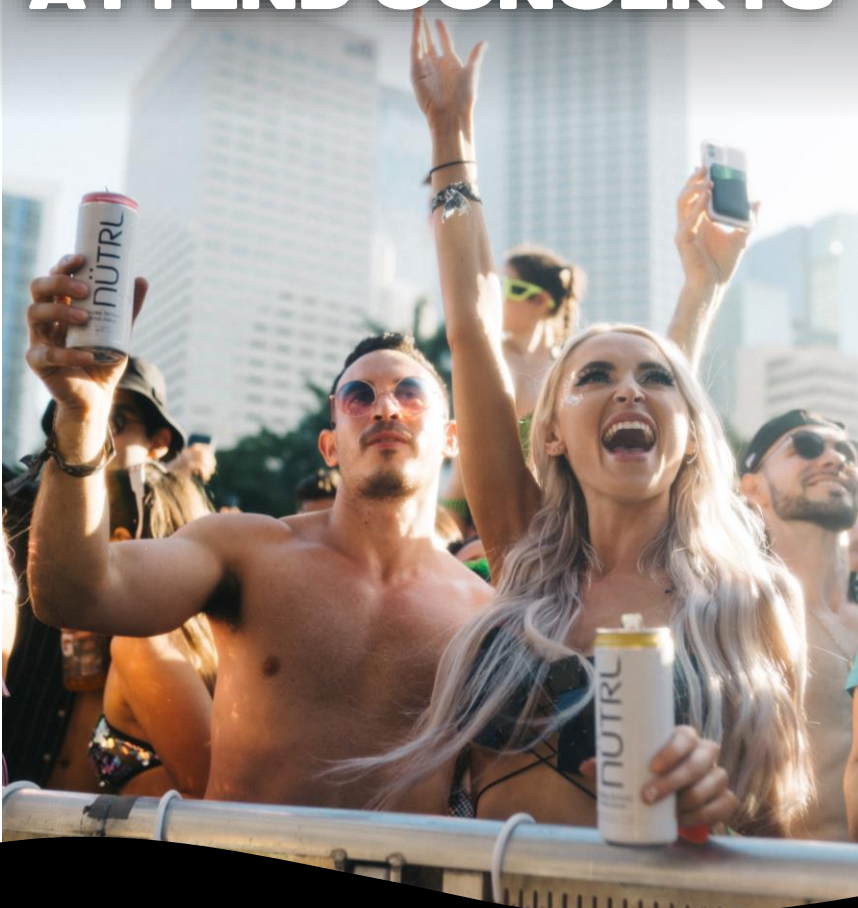


NÜTRL Prize Wheel –
spin to win merch,
premiums, and NÜTRL!

MUSIC



OUR DRINKERS ARE
1/3RD MORE LIKELY TO
ATTEND CONCERTS



**NÜTRL RESONATES
ACROSS GENRES**



**REACHING +1M
CONSUMERS THRU
SPONSORSHIPS**





HANGOUTS



HIGH ENERGY BARS



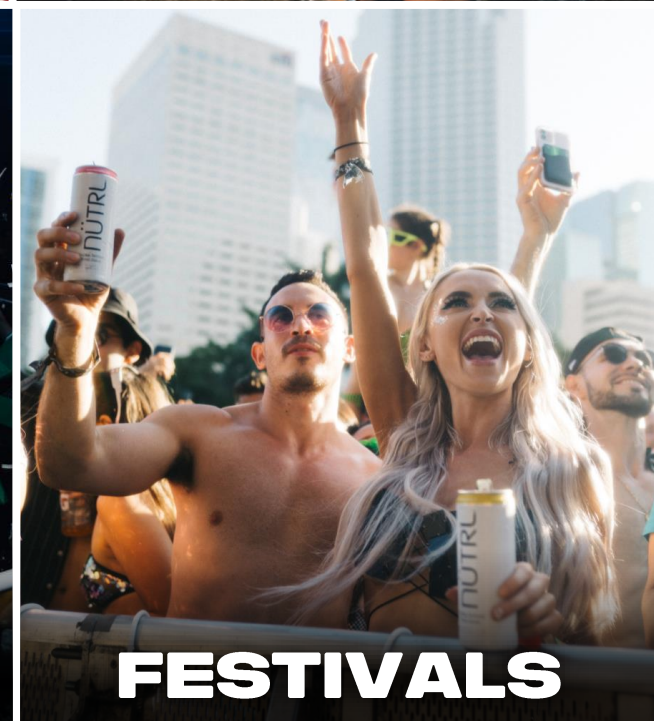
**COUNTRY
CONCERTS**



HOUSE PARTIES



CLUBS



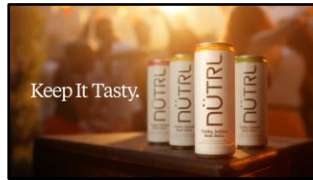
FESTIVALS

MUSIC MEGA PLATFORM

ACTIVATION PLAN

REACH

FOUNDATIONAL PROGRAMMING



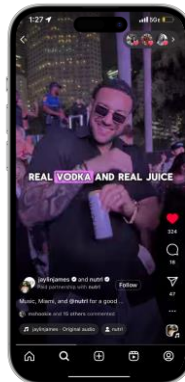
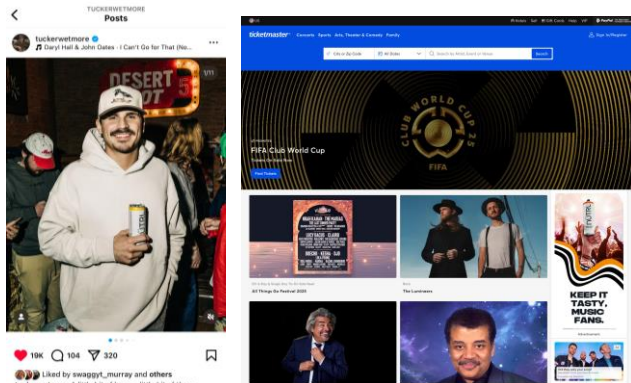
ENGAGEMENT



CONVERSION



PARTNERS



LIVE NATION
ticketmaster
VEEPS



MUSIC

ON PREMISE ACTIVATIONS

PROGRAM OVERVIEW

NÜTRL is giving fans uninterrupted access to the season’s biggest moments in music.

NATIONAL PARTNERSHIPS TO LOCALIZE

LIVE NATION

TUCKER WETMORE



**MUSIC
FESTIVAL
PARTNERS**



ALWAYS-ON HOOK

SCAN: Scan QR Code or follow link in Social Bio's
PLAY: Play scratch-off game to instant win
WIN: Festival tickets and concert cash for concert tickets

SCAN



Entry via QR code on SMTs, Standee, Digital

PLAY



Consumers are aggregated and complete registration

WIN

ticketmaster
\$20 or \$100 concert cash – gift cards redeemable on Ticketmaster

VEEPS
3 months VEEPS streaming access

All players will also be entered in grand prize drawings for Lollapalooza, GovBall, and winners' choice giveaways!

ACTIVATION



Hat press for localized thematic giveaways



NÜTRL Prize Wheel – spin to win merch, premiums, and NÜTRL!

ADDITIONAL PLAYBOOKS AVAILABLE



**XM ALWAYS ON
TOOLKIT**



**XM COLLEGE
TOOLKIT**



**XM MUSIC
TOOLKIT**



**INDY ON PREMISE
TOOLKIT**



**HOT ZONES
PLAYBOOK**



SINGLES SELL IN

NÜTRL ON PREMISE TOOLKIT



1

On Premise Opportunity

2

Execution Priorities &
Mega Platforms

3

NÜTRL Selling Playbook



HOW TO APPROACH A NON-BUY



**PREPARE
MATERIALS**



**WALK THE
ACCOUNT**



**SAMPLE
THE BUYER**



**SELL TO
BUYER**



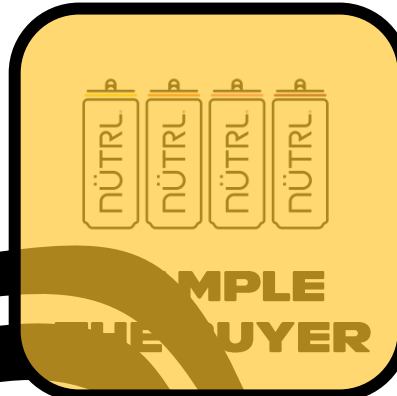
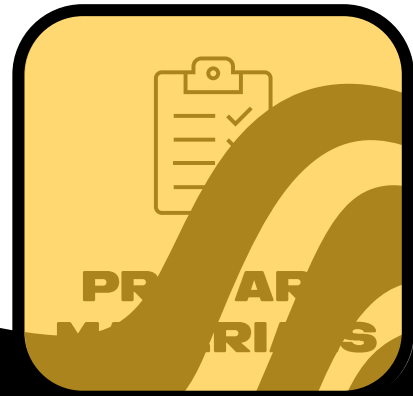
**CONFIRM
FOLLOW-UPS**

Prepare: Have sell sheets, business cards, and **ICE COLD Samples** ready when you walk in.

Know what competitive products they already carry & what slow ROS competitive product you plan to target with a new NÜTRL placement or additional flavor.

Know our products, pricing, the account's credit terms, and the BDR assigned to the account.

HOW TO APPROACH A NON-BUY

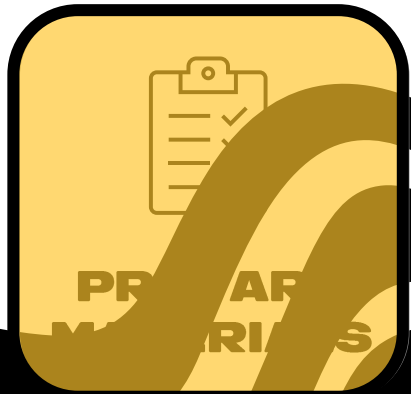


Walk the Account: Greet the staff, introduce yourself as a sales rep with Anheuser-Busch. Mention some of our great products (NÜTRL, ULTRA, Bud Light & Big Wave) to jog their memory. Take mental note of what competitive products the account already carries.

Ask if there is a buyer in that we can speak to to discuss an opportunity with NÜTRL.

If buyer is not there, ask for the buyers' contact info to follow-up (or ask for when buyer is around).

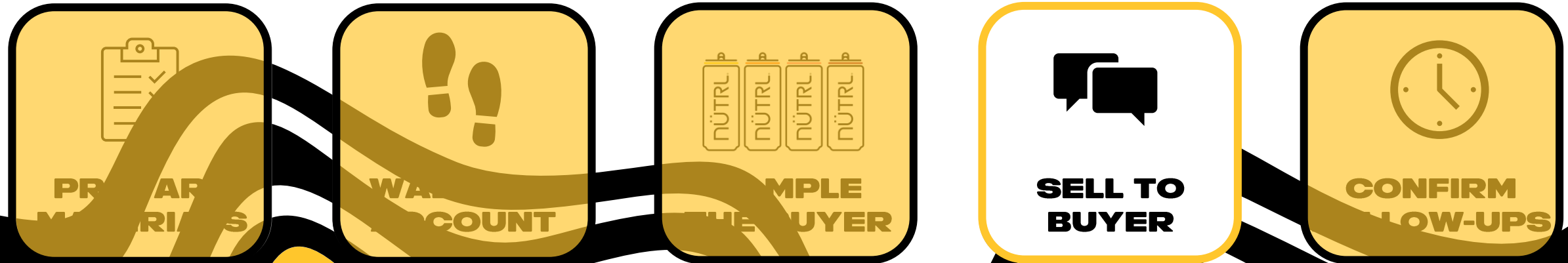
HOW TO APPROACH A NON-BUY



Sample the Buyer:

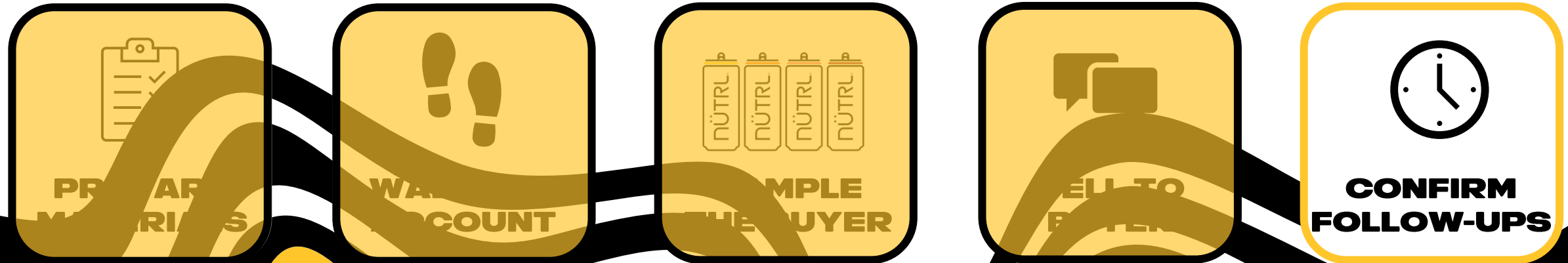
The best way to get an account familiar with NÜTRL is to let them sample our award-winning liquid. If the account has competitive Seltzer(s), do not be afraid to do a side by side taste test!

HOW TO APPROACH A NON-BUY



1. **Find the Decision Maker!** – critical we are selling to the Final Decision Maker for the account.
2. **Ask questions** – Ask the buyer and bartenders: How is business? What is selling vs. what is not? Do they carry competitive seltzers?
3. **Pitch our brands** – Lead with NÜTRL Pineapple, Orange & Watermelon. Leverage the content in this deck to create a compelling sell-in story + National & Local Brand Programming Support.
4. **Ask for the SALE!!** – ask when you can send in the first case, if they say no leave behind some samples and business card.

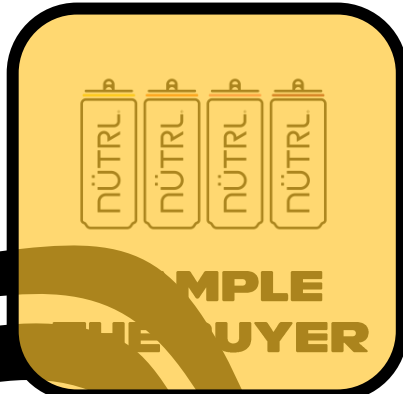
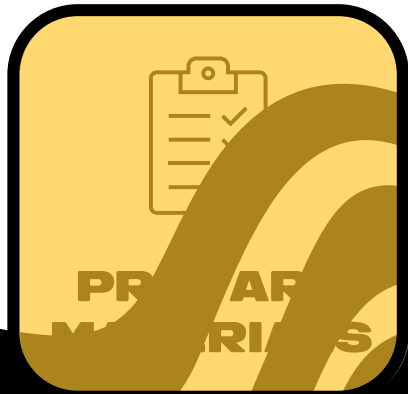
HOW TO APPROACH A NON-BUY



Confirm Follow-Ups:

1. Confirm Delivery Date for Product Arrival & Review Pricing for Features/Special.
2. Offer to create SMT to help highlight new NÜTRL Placements with a Bucket Feature.
3. Book Sampling/Activation to engage with Consumers on new NÜTRL Placement(s)
4. Book a Staff Training to educate the Staff on NÜTRL

HOW TO APPROACH A NON-BUY IN CONTROL STATES



Confirm Follow-Ups:

1. Confirm Control States SKU availability with Mason.Masters@Anheuser-Busch.com
2. Confirm with Account:
 - What state or agency store they purchase Spirits from
 - Delivery Date for Product Arrival & Review Pricing for Features/Special
 - Communicate with mason.masters@anheuser-busch.com on inventory needs for feature
3. Offer to create SMT to help highlight new NÜTRL Placements with a Bucket Feature.
4. Book Sampling/Activation to engage with Consumers on new NÜTRL Placement(s)
5. Book a Staff Training to educate the Staff on NÜTRL

MALT SELTZER DECLINE, **SPIRIT-BASED SELTZERS** CONTINUE TO GROW

MALT SELTZERS ARE DECLINING

TUS ONP Malt Seltzer



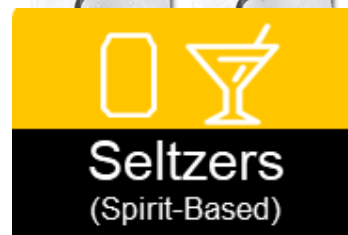
-13%

TUS **On-Premise** \$ Sales
YTD vs. YA

-15%

TUS **On-Premise** Volume
YTD vs. YA

SPIRITS-BASED SELTZERS



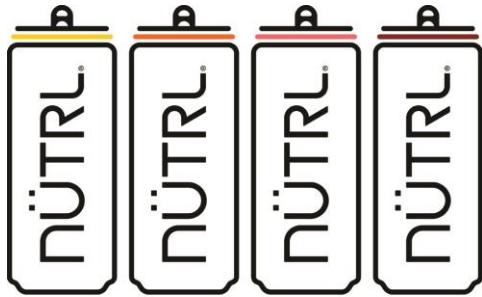
+29%

\$ Growth YoY for
Spirit Based Seltzers
in the On Premise

NUTRL CONTINUES GROW AS COMPETITORS STRUGGLE IN 2025

ON PREMISE

YTD Volume Trends
W/E 4/19/25



+ 33%

Keep It Tasty.



-2%

OFF PREMISE

Tuesday June 17th

Still Waiting on a Summer Spark:
Scans Stay Sluggish to Start June

**HIGH NOON NOW ON THREE STRAIGHT
WEEKS OF DOUBLE-DIGIT VOLUME
DECLINES.**

Outside of beer, we'd note that High Noon's recent skid continues. The brand has seen volume drop double digits now for three consecutive weeks, with volume down 19% in the week ending 5/25, down 12.6% in the week ending 6/1, and now down 14.4% in the week ending June 8.

2025 FLAVOR PRIORITIES

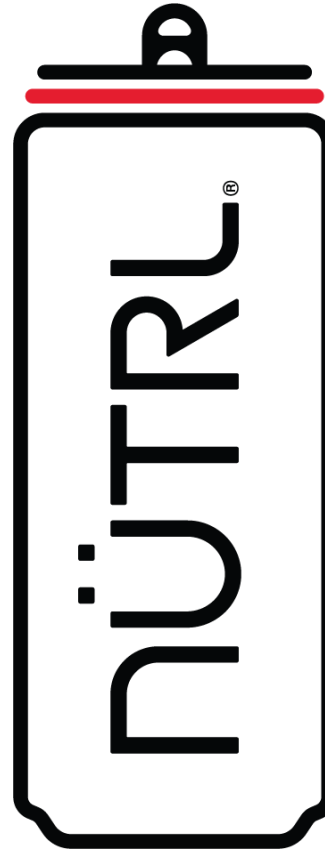
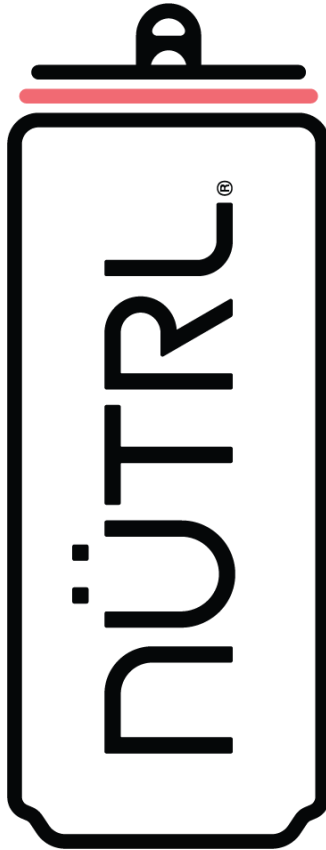
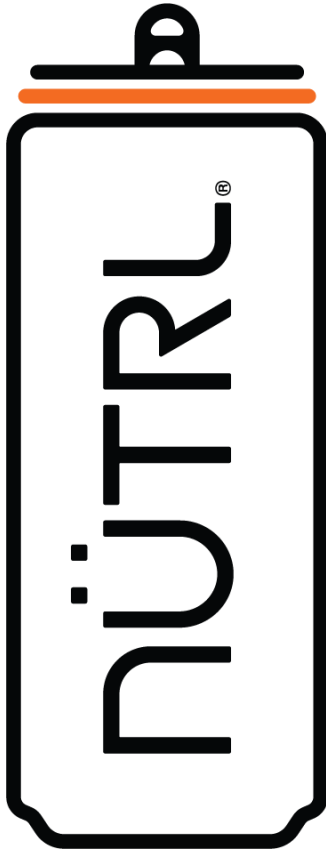
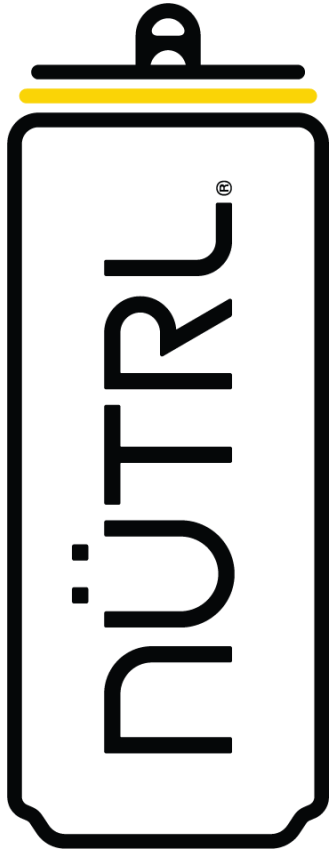
PINEAPPLE

ORANGE

WATERMELON STRAWBERRY

LIME

BLACK CHERRY



FLAVOR ASSORTMENT IS KEY DRIVER OF CHOICE FOR CONSUMERS

RANGE OF FLAVORS IS THE MOST IMPORTANT FACTOR WHEN CHOOSING A SELTZER

Q: When thinking about what brand of hard seltzer to choose, which of the following is important to you?

56%

of Consumers said Range of Flavors Available

FLAVOR SWITCHING IN ON PREMISE IS HIGH

75%

of Drinkers drink
Multiple Flavors
Socializing in ONP Accounts

Q. When drinking seltzers in bars & restaurants, do you typically drink multiple flavors or stick to one flavor?

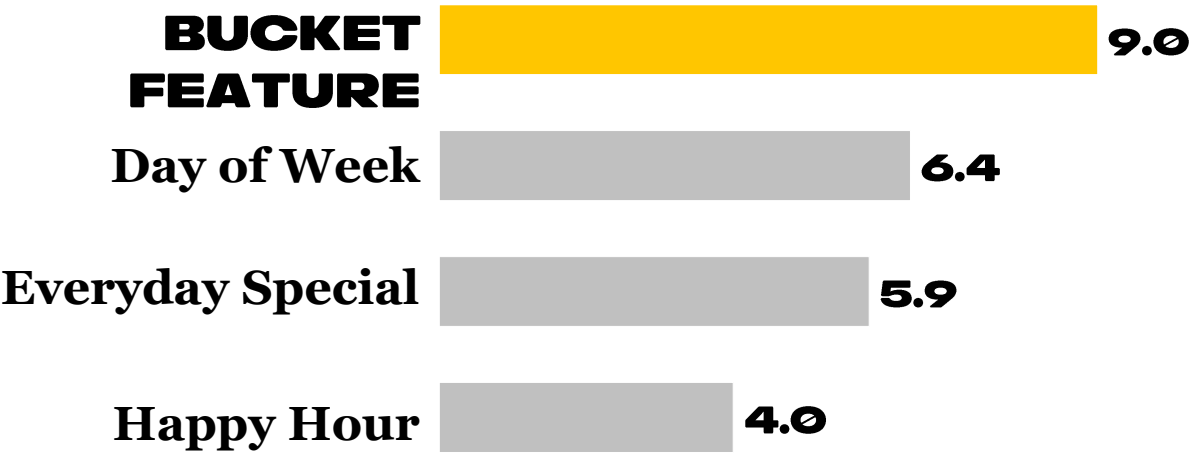
NÜTRL HAS THE FLAVOR ASSORTMENT TO SATISFY EVERY CONSUMERS

NATIONALLY AVAILABLE NÜTRL 4 PACK FLAVORS



ENCOURAGE CONSUMER TRIAL & FLAVOR EXPLORATION WITH MIX'N'MATCH BUCKET FEATURES!

NÜTRL HOT ZONE ROS | FEATURE ANALYSIS



IMPORTANCE OF 4-PACKS IN THE ONP

4-PACKS DRIVE ROS

NÜTRL ONP ROS

4 Packs

1.2

Variety Packs

0.5



4-PACK OPPORTUNITY

POD OPPORTUNITY

26K +

If all ONP VP Buying Accounts
converted to 4pk MPD....

Package	MPD	Buying Accts
4pks	2.40	≈ 24K
Variety Packs	1.16	≈ 11K

WHY 4-PACKS...

ACCOUNT BENEFITS

- Manage Inventory – in cooler + backroom.
- Allows for Mix’N’Match Buckets for ROS Support
- Meet Consumer demand for flavor variety

NÜTRL IS A REVENUE GENERATOR

Anheuser Busch investing in NÜTRL On Premise Pricing to help Drive Incremental Revenue for Retailers

ONP Profit Calculator	NUTRL 4-PACK	COMPETITIVE BRANDS		Feature Profit Calculator	
		Spirit Based Seltzer*	Spirit Based Iced Tea*	Feature:	\$7 Can
PRICE TO RETAILER	\$38.45	\$46.00	\$45.00	Number of Units in Feature	1
UNIT PRICE TO RETAILER	\$1.60	\$1.92	\$1.88	Feature Price	\$ 7.00
MENU PRICE	\$9.00	\$9.00	\$9.00	New PTC	\$7.00
WEEKLY CASE ROS ESTIMATE	2	2	2	Feature Lift	2
YEARLY REVENUE	\$22,464	\$22,464	\$22,464	vs CE Estimate	
YEARLY PROFIT	\$18,465	\$17,680	\$17,784	Yearly Revenue	\$34,944
				Yearly Profit	\$26,946
1 *TUS AVG Price Nielsen **Estimated Competitive Pricing				* Lift is based on selling X % over 1 CE per week	

To Edit Pricing information your local area - follow the directions below.
Right Click on the table above → Hover over 'Linked Worksheet Object' & Select Open

3 KEY ASKS FOR NÜTRL:

#1

GROW 4PK
DISTRIBUTION
AT INDY 'B'
ACCOUNTS

**CLOSE OUT 'B' NÜTRL
NON-BUY ACCOUNTS**

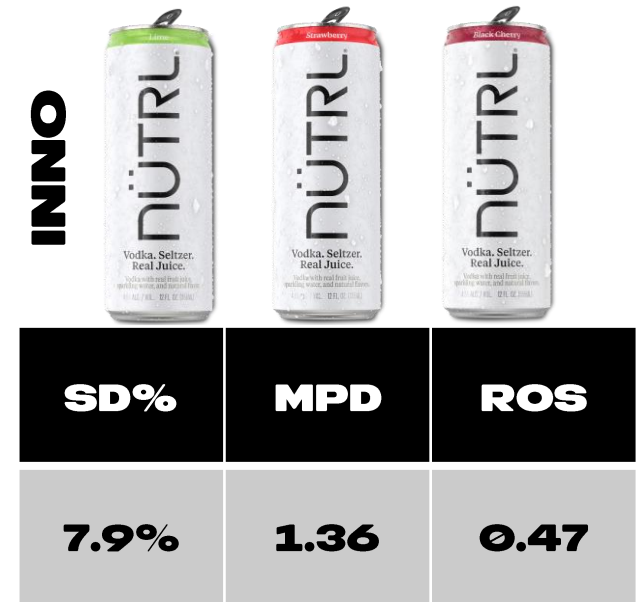
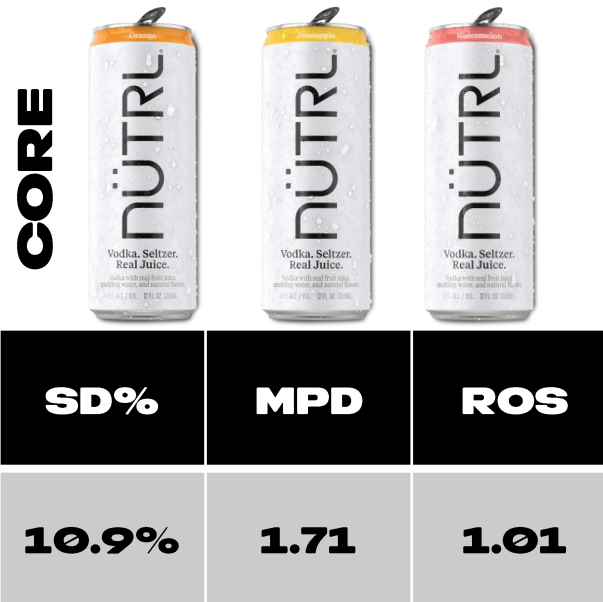


3 KEY ASKS FOR NÜTRL:

#2

EXPAND 4-
PACK MPD &
LEAN INTO
INNOVATION

MAINTAIN CORE FLAVORS & EXPAND MPD WITH INNOVATION



3 KEY ASKS FOR NÜTRL

#3 BUCKET FEATURES & MENU CALLOUTS

BUCKETS ARE #1 ROS FEATURE

NÜTRL HOT ZONE ROS | FEATURE ANALYSIS



ADDRESSING COMMON PUSHBACK

TOP SELL-IN PUSHBACK FROM ACCOUNTS

1

My crowd doesn't drink seltzer...

2

I already carry a different seltzer brand at my account...

3

My customers don't know the NÜTRL brand & won't order it...

4

How are you going to support NÜTRL at my Account...

COMMON PUSHBACK #1

MY CROWD DOES NOT DRINK SELTZER..

**SPIRIT SELTZERS ARE THE
FASTEST GROWING
SPIRITS CATEGORY**

+28%

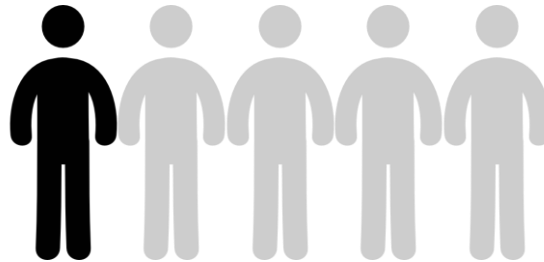
On Premise \$ Growth
L52wks



Source: CGA L52W ending 3/22/25 NÜTRL + HN

**SPIRIT SELTZERS HAVE
MASS APPEAL**

**SPIRIT SELTZER REACHES
1 OUT OF 5
PEOPLE**



**WHO PURCHASE
ALCOHOL**

Source: numerator Shopper Metrics; % of Shoppers 52w ending 5/18/25

**SPIRIT SELTZERS
OVER INDEX WITH
YOUNGER CONSUMERS**

+20%

**GREATER REACH
WITH 21-34 Y/O**

VS. TRADITIONAL SPIRITS DRINKERS

Source: Nielsen Spring OPUS 2025

COMMON PUSHBACK #2

I ALREADY CARRY A DIFFERENT SELTZER...

RANGE OF FLAVORS IS THE MOST IMPORTANT

Q: When thinking about what brand of hard seltzer to choose, which of the following is important to you?

56%

Range of Flavors Available

Source: CGA L52W ending 3/22/25 NÜTRL + HN

NÜTRL HAS AWARD WINNING FLAVORS!

BEST VODKA SELTZER

NÜTRL Vodka Seltzer *Rolling Stone*



Seltzer Nation's 2024 Best Tasting Pineapple Flavor



Keep It Tasty.



NÜTRL HAS FLAVOR DIFFERENTIATORS



#3 ONP Package YTD

2025 Innovation

COMMON PUSHBACK #3

PEOPLE DON'T KNOW NÜTRL & WON'T ORDER

NATIONAL SPONSORSHIPS WITH KEY PARTNERS



BUSSIN'
WITH **THE BOYS**



LOCALLY RELEVANT SPORTS AFFILIATIONS

PRO SPORTS

60+   
Partner Teams Where
We Can Leverage IP* 

COLLEGE

30+   
Partner Schools Where
We Can Leverage IP* 

OVER INVESTING IN SAMPLING + NÜTRL STAFF TRAINING

2025 YTD SAMPLING OVERVIEW

1.5K+ Activations
+140K Consumers Sampled

SERVER EDUCATION CARDS

NÜTRL | PINEAPPLE
VODKA BASED SELTZER
4.2% ABV - 100 CALORIES



pineapple



bright



tropical

FLAVOR PROFILE

FUN FACTS

#1 Pineapple
Flavor in Hard
Seltzer category by
awarded by Seltzer
Nation 2024



Scan For
More Info!



NÜTRL | ORANGE
VODKA BASED SELTZER
4.2% ABV - 100 CALORIES



orange



bright

FLAVOR PROFILE

FUN FACTS

Orange is the **#2**
most preferred vodka mixer and
fastest growing Citrus flavor
within Seltzer



Scan For
More Info!



NÜTRL | WATERMELON
VODKA BASED SELTZER
4.2% ABV - 100 CALORIES



Watermelon



fruity



sweet

FLAVOR PROFILE

FUN FACTS

Watermelon 4pk's
are **#2** largest watermelon
flavored spirits seltzer 4pk.



Scan For
More Info!



COMMON PUSHBACK #4

ACCOUNT SUPPORT FOR NUTRL

SAMPLING ACTIVATIONS



ON PREMISE POCM & GIVEAWAYS



CONSUMER SWEEPS & REBATES



3 KEY ASKS FOR NÜTRL

GROW DISTRIBUTION

#1

**CLOSE OUT
INDY 'B'
NON-BUYS**

WITH FOCUS ON 4-PKS

EXPAND MPD

#2

**EXPAND
4-PACK MPD &
LEAN INTO
INNOVATION**

INCREASE ROS

#3

**BUCKET
FEATURES
& MENU
CALLOUTS**