

Selling Story & Water

Fine Waters of the World

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THE GOOD

We sold the story of Fine Waters as a portfolio (water menu, pairings, etiquette, ..) and the story is widely accepted. We see demand

THE BAD

Fulfilling the growing demand and actually selling Fine Waters as a portfolio is challenging at best ...

STATUS

- Premiumization of the category is full swing
- Wide Acceptance of Premium Waters (table, bar, kitchen, ..)
- Bottled Water overtaking soda sales
- Premium segment growing fastest
- Current Transitions
 - Commodity > Terroir
(bottled water, chocolate, salt, olive oil,
 - Processed > Natural
(less McDonalds more Farmers Market)
 - Sodas > Alternatives
(decline in soda sales, less alcohol, more water)

PROBLEM

- The premium bottled water market is highly fragmented and does not come close serving the demand of the consumer, HORECA or retail.
- Small passionate brands/distributors all trying to solve the same problem: Fulfilling global demand and growing the premium segment.
- Pervasive brands S.Pelegrino, Panna, Voss, Evian, Fiji, ... dominating the market with distribution solutions and marketing muscle.

GLOBAL NEED

- Fulfilling existing demand for portfolio (pull)
- Global access to a portfolio of premium waters from a reliable company ... (pull)
- Global education on the emerging trend of premium water in a epicurean setting (table, bar, kitchen, ..) to further grow demand ... (push)
- Environmental and social responsibility proposition properly communicated ... (push)

SOLUTIONS

- ACT BIG
Closer Cooperation of Small Players
- BECOME BIG
Big Company formed by Small Players and \$\$\$

CLOSE COOPERATION

- Small brands or distributors forming strategic alliances and co-distribution deals and entities to create efficiencies and scale.
 - Shoe string budget
 - Bottom-up
 - Dynamic
 - Organic and opportunistic
 - Relatively simple to create but effort to maintain
- Fine Water Society and FineWaters can play a key role putting alliances together and provide visibility.
- FineWaters “Where to Buy Link” for listed brands in coordination with portfolio distributors.
- Social Media content platform and content distribution becoming an important part of the cooperation.

BIG COMPANY

Creating the category dominating vertically integrated entity that fulfills the growing demand of premium bottled water segment on a global scale.

- Properly funded (private equity, VC, other funding or host company)
 - Top down
 - Stable
 - Long term vision and planning
 - Effort to create but easier to maintain
- Forming an entity around the core of the existing FineWaters as a fast, flat, technology driven, zero-geography company.
 - Roll-up acquisition of core premium brands (20+).
 - Roll-up acquisitions of portfolio distributors from around the world.
 - Create 50+ geographic diverse portfolio of core and distributed brands
 - Uberizing the category by creating a high-tech global real-time order and distribution backbone (mixed containers/pallets/boxes) with high-volume efficiencies of scale, retail strategy, water store concept.

DETERMINANTS

- Lack of Vision & Passion & Funding
Not seeing the future. Short term vision. Local strategy. Quarterly statements. Spreadsheets.
- Environmental Concerns
Can be addressed via multiple-bottom line and commitment to environmental/social responsible sourcing of water. Effectively communicated on social media by creating emotional connections to the sources. Protector of sources and drinking the water helps protect the sources (eat to protect)

Thank You