



FOR PUBLICATION

# A decade of Heineken® brand design, doubling the brand.

DBA Design Effectiveness Awards entry 2025  
HEINEKEN International NV

# 1. Executive summary

Over the past decade, from 2015 to 2024, brand design has been an integral and substantial part of the success of the Heineken® brand worldwide (and thus of the company as a whole).

Design at Heineken is so integrated in everything the brand does, that it's not possible to really isolate design-effectiveness.

Yet, it's safe to state that the brand's growth would have been impossible without effective design, and that a significant part of the growth can be attributed to brand design, in all its shapes and forms.

Most design-effectiveness cases take a specific project with clear boundaries, in order to get a clean read on the value of the design-component. We think it's also valuable to build a design-effectiveness case based on design as an integrated long-term (10 year) brand-building tool, at scale.

The objective in 2015 was to double the size and market share of the brand in 10 years time.

The design-strategy was based on an already strong legacy of branding, creativity and innovation and consisted of five elements:

1. Evolve the brand identity to become even more iconic
2. Innovate & design the brand's first global line-extensions
3. Develop a clear design component in every campaign and every channel
4. Explore new concepts through continuous 'design-explorations'
5. Design the business-system more circular, to lower the CO<sub>2</sub> footprint.

The push to double the brand was triggered in 2015 by the fact that the world's largest brewer - Anheuser-Busch-INBEV (ABI), acquired the number 2 SAB-Miller, and became a giant competitor and threat for number 3: the Heineken Company.

The Heineken Company owns a large portfolio of brands, some global and many local brands, but the crown jewel is the Heineken brand. And if there's one brand that potentially had the power to beat ABI (incl. the acquired SAB-Miller business), it's the Heineken brand.

## Heineken Brand Design-effectiveness:

The results, in a stagnant/stable global beer market, from 2015–2024:

Annual volume

33 > 61

Million Hectolitre

Market share

2.5 > 5.1%

of beer value

Carbon footprint / HL

23% decrease

(like for comparison)

## 2024: Heineken® Volume

In millions of hectolitres

61.1 mhl



We cannot isolate the design-effectiveness component. But many sources state that brand-equity and -growth, are roughly **50 to 70%** determined by physical touchpoints in 'trade' (bars, retail, events): in Heineken's case: pack, glass, draught column, POS material, merchandise, etc.

McKinsey research proves that 'organisations that take design seriously', perform **double** on ROI and shareholder value.

**Let's stay on the safe side, and attribute 20% of the Heineken growth to effective design.**

Based on Heineken's value share of the beer market, the growth is from € 14.6 Billion to € 30 Billion = € 15.4 Billion x 20% = **design-effectiveness of € 3 Billion total revenue, in the year 2024.** Reached with an annual design-investment of REDACTED CONFIDENTIAL DATA.

# 2. Market context & numbers

**Heineken brand is present in over 190 countries, that's almost every country on the planet. The world beer market is too big, fragmented and differentiated to describe a proper and granular market context. But the big picture is:**

From 2015 to 2024 the world beer market was stagnant/stable at 1900 Million Hectolitres/year. Approximately 585 Billion Euros value.

In 2015 nr. 1 ABI (20% volume market share, with brands like Corona, Becks, Stella Artois, Budweiser, Brahma, Leffe, etc) acquired nr. 2 SAB-Miller (9% market share, with brands like Miller, Peroni, Urquell, Castle, etc.), the new ABI has 29% market share. Heineken Company was nr. 3 (9% market share, with brands like Heineken, Amstel, Tiger, Birra Moretti, Desperados, etc), and became automatically nr. 2 (because 1 and 2 merged).

In 2024 ABI has 25% volume market share, Heineken Company 13% market share. Heineken Company managed to grow from 1/3 of ABI, to 1/2 its size.

Heineken Company acquired some business between 2015 and 2024, but nothing really fundamental: a stake in Lagunitas USA, a local business in Brazil, a licence deal in China, increased its share in Kingfisher India, acquired Distell in Namibia/South Africa, sold the soft drinks in The Netherlands, and the (7 breweries) business in Russia.



**In this context, the Heineken brand almost doubled, over the past decade (2015–2024).**

Design-effectiveness:	2015	2024
Heineken brand volume/yr	from 33 Million Hectolitre	to 61 Million Hectolitre
Heineken brand market share of global beer volume	from 1.8%	to 3.3%
Heineken brand market share of global beer value	from 2.5% from €14.6 Billion	to 5.1% to €30 Billion
Heineken brand equity <small>(Kantar methodology – different sources give different values)</small>	from €8 Billion	to €11 Billion
Carbon footprint / HL	from 71.2 kg CO <sub>2</sub> / HL	to 55.7 kg CO <sub>2</sub> / HL decrease of 23%

Sources: Heineken Company annual reports, Global market data like Nielsen and many others, Kantar, Ipsos, Consultancy analyses.

# 3. Design brief & strategy

The overall business objective in 2015 was to double the size and market share of the Heineken brand in 10 years time. Both in volume share and in value share, without decreasing the premium-ness, brand equity and profitability.

Pricing strategy stayed globally unchanged. General brand building and marketing activities continued as usual.

James Bond sponsorship slowly faded out over the years, F1 was added as new platform for the brand. UEFA Champions League continued, just like many local music festivals. Advertising campaigns shifted from TV focused to Social Media focused. Media and production spending in markets was approximately stable (with inflation correction).

There was a bold ambition to elevate the role of design.

For brand design (and product-innovation) the strategy was:

1

Evolve the brand identity to become even **more iconic**, for increased stand-out and premium-ness.

2

Innovate & design the brand's first **global line-extensions**: Heineken SILVER and 0.0, to reach more consumers, at more occasions.

3

Develop a clear **design component in every campaign and every channel**, to activate everything the brand does, also in point of sale, in bars in stores, at events.

4

Explore new concepts through **continuous 'design-explorations'**, to fill the innovation pipeline, and fuel the progressive/open-minded brand values.

5

Design the business-system **more circular**, to lower the CO<sub>2</sub> footprint to reach zero in 2030, to be a good global citizen and protect the licence to operate.

# 4.1 Design in action

## Brand visual identity - Dial up visual identity

As of 2016 'The Heineken Green Identity' program was launched and implemented worldwide. An overall redesign to evolve the Heineken visual brand identity to become even more iconic.

With a clear focus on three key assets, anchored in the history and DNA of the brand:

1. Heineken Green
2. Red Star
3. Heineken wordmark with the smiling e's

Distracting elements were either deleted or pushed to the background as generic embellishments (black banner, hop-leaves, medals). To become iconic, it was decided to treat the key assets very bold; big, cropped, daring. Each key asset has its own role, meaning and story.

Between 2016 and 2020 all different touchpoints were redesigned. Not one big-bang makeover of everything, but a gradual evolution to allow for proper design deep-dives in all touchpoint materials. Never simply a logo change, but always a reconsideration of the role, functionality, carbon footprint, market context, etc.

With this approach we could ensure that every design of packaging, glasses, draught columns, signs, bar tools, displays, apparel, activations, home draught systems, consumer gifts, etc. was well considered, developed together with marketers in the markets, and in research outperformed competition on: 'premium quality', 'brand fit', 'preference', 'stand-out', 'want to be seen with', etc.



### Design-effectiveness:

Multiple consumer-researches show that Heineken is perceived as the **world's most iconic beer brand**.



New iconic identity  
**>80% brand recognition**

# no1zon®

# 4.2 Design in action

## Innovate & Design line extensions

Heineken brand historically had some small local line-extensions; in its home-market The Netherlands there was Bok-bier, in USA there was a Light beer and a Dark lager. These were small exceptions to the rule that Heineken was a mono-brand for almost 150 years.

**In 2015 it was decided to start innovating with line-extensions, to penetrate more consumption occasions and more consumer repertoires, while staying true to the brand and 'refreshing lager' DNA.**

It actually also was the first time we (/anyone) were capable of brewing a truly great tasting Heineken 0.0. Technically it took many years to reach this point.

Heineken 0.0 was launched in 2017 in the first series of markets, and over the following years gradually introduced globally.

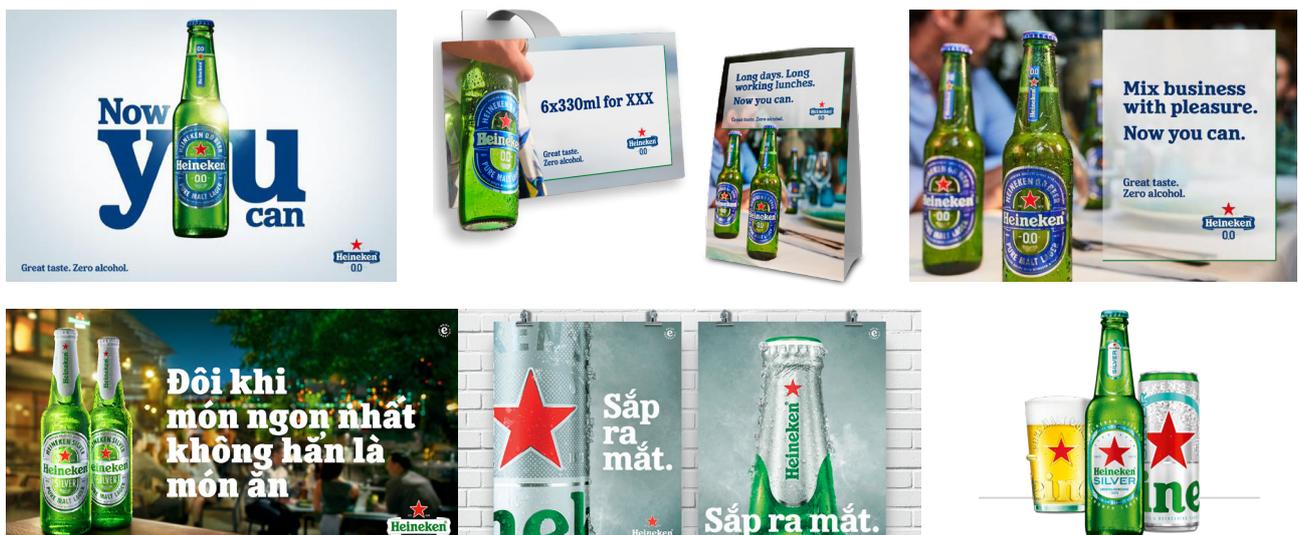
Design was crucial in giving it an identity that was not diluting the iconic brand identity, that was confident and mature, and properly distinctive from Heineken Original (confusing alcohol and alcohol-free can cause serious issues).

The blue Heineken 0.0 label looks obvious and easy, and that's probably also its power; it was a true success factor. It set the worldwide code for alcohol-free, clearly signaled

the stretch of the brand into new territories, and was seen as very appealing and confident.

The first years of launch and communication were all about the visual identity; making people aware and making people try. In 2024 it was REDACTED CONFIDENTIAL DATA of the brand franchise.

Heineken SILVER was launched in 2019 in Asia, because the Asian taste-palette is less bitter, more 'smooth'. In 2022 and 2023 SILVER was also introduced in Europe and the Americas. With a slightly different proposition and design (plus a light teal added), more rejuvenated and on low alc and low cal/carbs. SILVER is now 10% of the overall brand.



Design-effectiveness:

**The designs of 0.0 and SILVER were the focus of the launches, and proved to be fundamental to building and growing adjacent lager categories.**

# 4.3 Design in action

## Integrated campaigns - Design in every touchpoint

Design has been fully integrated in every major campaign, sponsorship and every channel.

Design is responsible to give each activation its visual identity, to be the 'face' of every campaign or sponsorship in every customer and consumer touchpoint. Consistently designing all activations ensures that the key brand assets are being respected and guarded, without becoming wallpaper. It keeps the brand identity vital and engaging.

Of course it also ensures consistency and recognition of all different touchpoints linked to an activation: print, OOH, posters, displays, in-store comms, in-bar comms, social media, etc. Over a decade ago, when we didn't have this integrated approach yet, it turned out to be difficult to make a campaign or sponsorship relevant beyond the 'TV-commercial' or event itself. The way Heineken partnered with, and activated James Bond, Rugby World Cup, Champions League, Formula 1, etc. is considered a benchmark in the industry. (It also helps to increase the relevance and value of the properties.)

Design-effectiveness:

**Design of key-visuals, packaging, point of sale and merchandise materials, amplify campaign- and sponsorship-investments in countless bars, retail stores, and events around the world.**



# 4.4 Design in action

## Explore new concepts - Design the future

In big organizations like the Heineken Company, innovating can be a challenge. There are many stakeholders, heavy, complex processes and decision structures, strong focus on cost-efficiencies, etc. Out-of-the-box ideas, (yet) unproven concepts, long term visions, and spontaneous trials, most often die quickly. While this can be a key source of innovation, learning, new business and growth.

**That's why we've created our own 'white canvas' creative playground: Heineken Studio. To experiment, trial, fail, learn, improve, have fun. Whether it's beer-recipes, serving rituals, bar-tools, the full nightlife experience, collabs or a bottle-opener. At Heineken Studio we explore new concepts through continuous 'design-explorations'.**

In the past we developed similar spaces at Milan Salone del Mobile, London Design Festival, or at the Heineken Experience in Amsterdam. Always with the objective to use the design approach to re-consider the entire experience that consumers have, to challenge the status quo, to 'brew the future'.

Heineken Studio is the latest iteration, currently live in a few first European countries, soon traveling further.

This also fuels the progressive, open minded values of the Heineken brand. Heineken has a 150 years long history of pioneering, and that makes it the perfect fit with the brand. Consumers love to be part of it, to see and try. Even if things fail, consumers feedback positively; they appreciate the engagement, the fact that Heineken listens, and that a big brand like Heineken dares to do unconventional things.



Design-effectiveness:

**Many concepts that started here small, scaled up globally; the alu Club-bottle, bar- and club-designs, limited edition packs, and currently even a new beer: Mokum 750**

(for the 750th anniversary of the city of Amsterdam).

# 4.5 Design in action

## Increase circularity - Design circular

A large part of Heineken's carbon footprint and circularity is determined in parts of the chain that 'design' and marketing cannot really influence: energy in the breweries, energy in the packaging supplier's factories, recycled content at the packaging supplier, etc.

**But if you dive deeper, design can add fundamental value to move the needle. Brand design can help to successfully reach the net zero goals by:**

1. Informing consumers what's the most sustainable choice; currently they often don't even know (e.g. designing a system of symbols to communicate about sustainability facts).
2. Making sustainable behaviour convenient; if it's more hassle, people won't do it (e.g. designing multi-packs to return bottles easily, or designing cup-return points at festivals with gamification).
3. Elevating the most sustainable proposition to make it the most appealing (e.g. make the returnable bottle more premium, more cool than the one way bottle; make it too precious to trash).

<p><b>Reach net zero carbon</b></p>  <p><b>Reach net zero across our value chain by 2040</b></p> <p>2024 progress and results 161K CO<sub>2</sub> reduction vs. 2022 baseline in Scope 1, 2 and 3 emissions</p> <p><b>Reach net zero in Scope 1 and 2 by 2030</b></p> <p>2024 progress and results 304K CO<sub>2</sub> reduction vs. 2022 baseline in Scope 1 and 2 emissions; 84% electricity from renewable sources in Scope 1 and 2 in production</p> <p><b>Reduce Scope 3 FLAG (forest, land and agriculture) emissions by 30% and non-FLAG by 25% by 2030</b></p> <p>2024 progress and results 23% CO<sub>2</sub> reduction of Scope 3 FLAG emissions vs. 2022 baseline; 11% CO<sub>2</sub> reduction of Scope 3 non-FLAG emissions vs. 2022 baseline</p>	<p><b>Maximise circularity</b></p>  <p><b>43% of volumes sold in reusable format by 2030</b></p> <p>2024 progress and results 39% of volumes sold in reusable format</p> <p><b>50% recycled content in bottles and cans by 2030</b></p> <p>2024 progress and results 44% of recycled content in bottles &amp; cans</p> <p><b>99% of all packaging is recyclable by design by 2030</b></p> <p>2024 progress and results 98% of packaging recyclable by design</p>
--	---

Reporting and data on sustainability Company-wide.



Design-effectiveness:

**Saving 23% CO<sub>2</sub>/HL a.o. via many initiatives to make products more circular - light-weighting, better materials, recycling, re-using, and maybe most impactful: making consumers prefer the sustainable solution – then it becomes a point of difference that adds business value, and it's win-win.**



# 5. Managing design

## Design-management team

Brand Design at Heineken is managed by a team of 10 to 13 design-managers, based in HQ in Amsterdam. The design-managers are responsible for the entire process from briefing, concept development, design-finetuning to implementation worldwide. Including the ongoing governance of brand design globally of everything in the design-scope: brand visual identity, all packaging and innovation-designs, all physical POS and merchandise materials, key visuals and campaign key visuals, BtL templates and branding for all comms and touchpoints.

The team works with, and orchastrates, a roster of design agencies, with each their own clear role. A big lead agency, 2 challenger agencies, and also specialist agencies for e.g. product engineering, fashion, interior, BtL activation, event spaces, etc.

The team reported into the Global Heineken Brand Director / VP, and the Global Design Director was part of the Management Team of the Heineken Brand.

As a result of the successful design-management for Heineken brand, in 2023 the design team was elevated to take responsibility for the brand design of all brands in the company portfolio. Of course, continuing managing Heineken brand design as well.

Design-effectiveness:

**We attribute 20% of the growth of the brand to design – that 20% equals 3 Billion total revenue in 2024.**

**Spending under 5% on design makes it an extremely effective tool.**

## Annual budget

The annual Heineken brand design budget was REDACTED CONFIDENTIAL DATA.

(This is well under REDACTED CONFIDENTIAL DATA of the total Heineken brand budget at HQ.)

# Cheers!





Ramses Dingenouts, Caroline van Hoff, Jason Rosenberg, Richard Grosman, Rieke Horlings,  
Paul Mak, Fon Wan Chan, Brigitte Doeland, Mariana Arboleda, Mark van Iterson

in collaboration with  our preferred agency partners

## Design bridge and partners

Emma Follett, Peter Eisen, Giovanni Pinzanni, Boo Hoeboer, Niels Grimbergen,  
Frank Nas, Elseline Ploem, Judith Smit, Jeroen Meijer, Lisa Mathews



Janwillem Bouwknecht, Guyot Duquesnoy,  
Herman van der Vegt, Ingmar Maurice, Peter Hiep



Merel Wicker, Kim Leemans



Ben Heppener



Joost Waltjen, Rens Baeten



Diederik van Kollem, Sofia Moreno Coca,  
Joris Verwiël, Roos van Dam, Jeroen Huisman,  
Niels Streckfuss



Nick Rees, Joanna Buist, Jason Kempen,  
Alex Melton, Jordon Assender, Chris Jenkins,  
Paul Shepherd, Jessica Procter



Rory Sutherland, Luke Heyes,  
Laura Horne, Dave Palmer, Kate English



Lucinda Watson, Hugo Baumgarten,  
Izel Baydarli, Dacey Leutwiler,  
Joanne Wilby, Kim Wade,  
Keeley Meredith, David Cooper, Lisa Barker



Yvonne Hakkaart, Steven de Breet, Freek Paul,  
Bart Schreurs, Marco de Ruiter, Orpa Berhane,  
Johannes Ridderbos, Jasmine Bernardi,  
Laura van den Bemt, Indira Gomez Cano



Maureen Beerepoot, Annette Westendorp,  
José Pluymaekers, Marleen Roelofs,  
Evy Driever, Rozemarijn Verschoor, Alco Velders,  
Robert van de Hurk, Axel de Wee, Mick de Reuver

# Design work that works.

Design **dba**  
Effectiveness  
Awards  
2026