

THE MISSING INGREDIENT

IN THE ZERO-PROOF MARGARITA

Giffard Alcohol Free Triple Sec sits at the convergence of America's favorite cocktail and one of beverage's fastest-growing moderation behaviors.

*A familiar cocktail. A flexible ABV.
A premium ingredient story.*



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WA.

TWO PROVEN BEHAVIORS

THE OPPORTUNITY IS THE OVERLAP

Consumers are not choosing between cocktails and moderation.
Increasingly, they participate in both.

69%

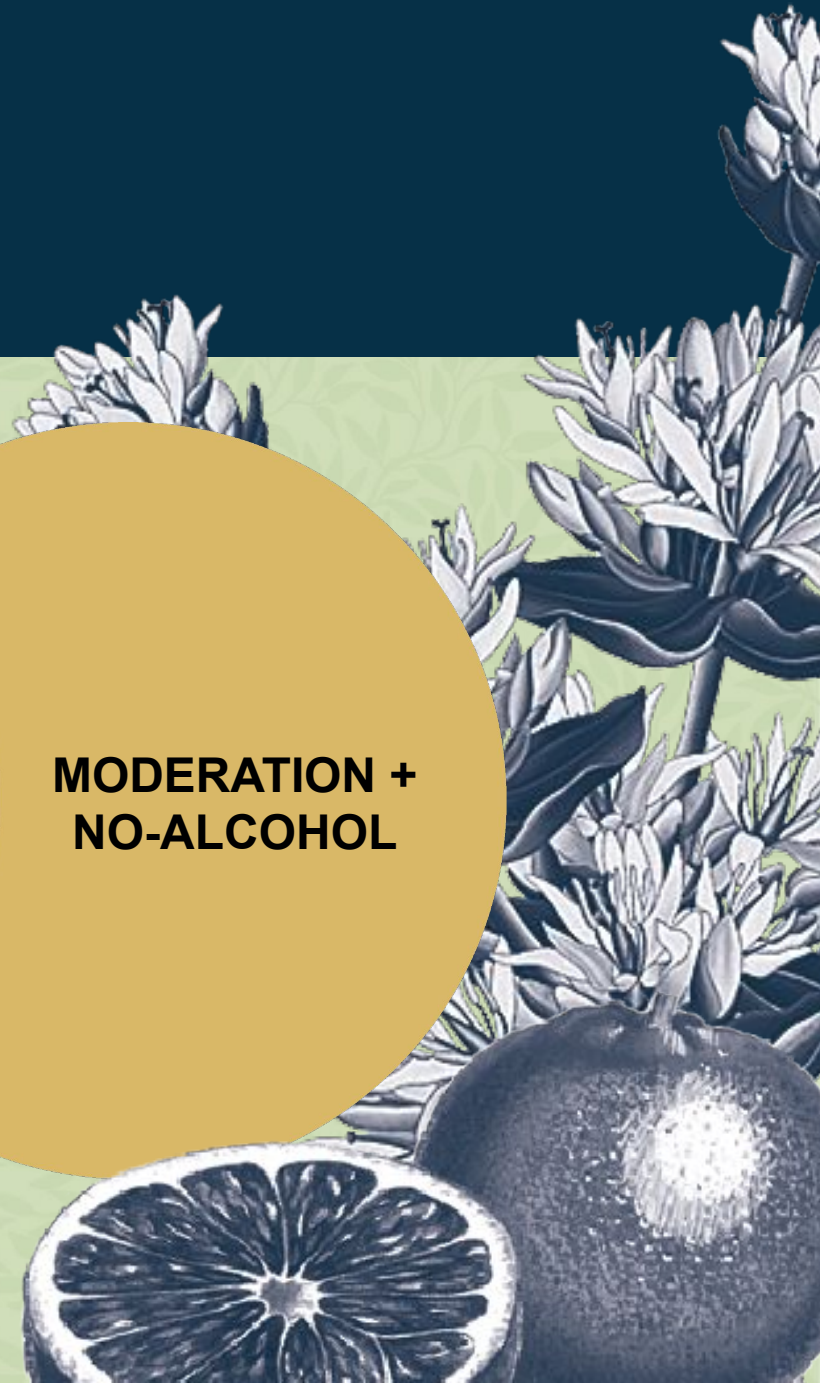
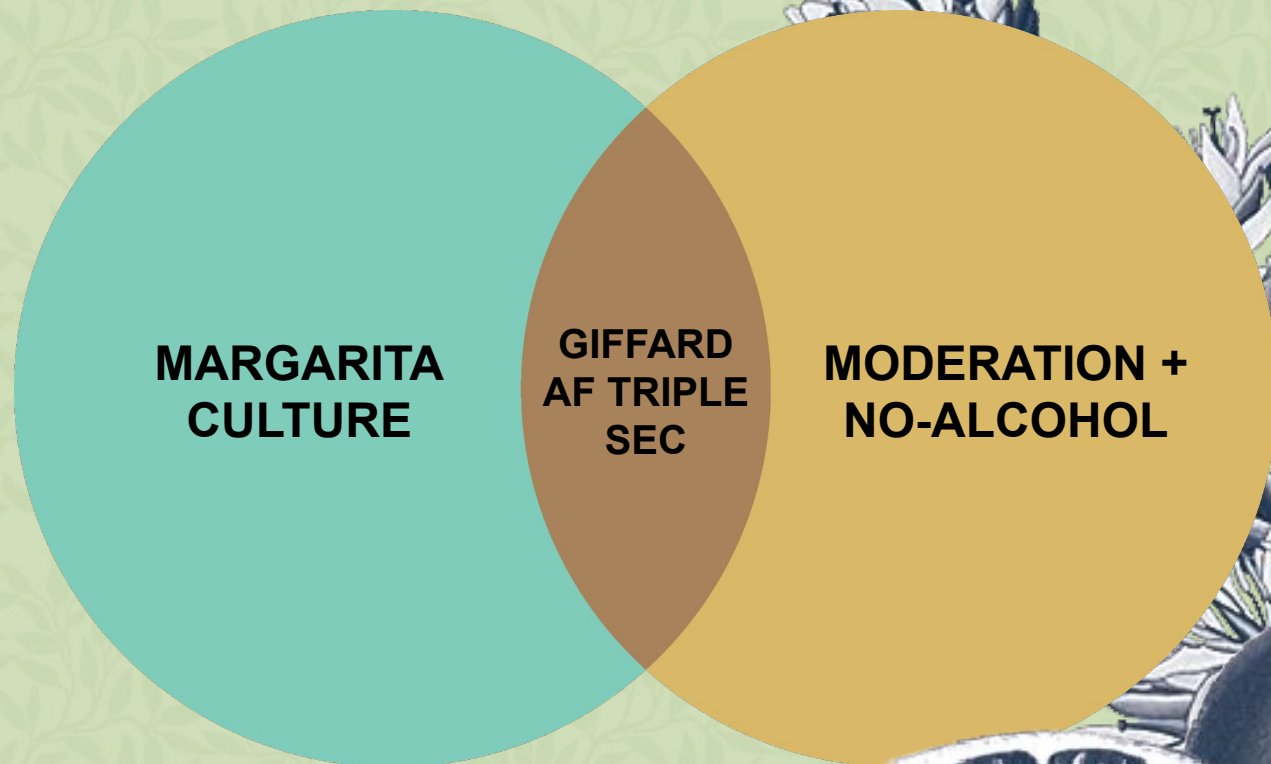
of cocktail drinkers also
consume non-alcoholic cocktails

NIQ/CGA, Nov. 2025

THE BRIDGE

The same consumer can want a full-strength
Margarita on Saturday, a lighter serve at dinner,
and zero-proof on Tuesday.

Sources: NIQ/CGA • IWSR • Bacardi Cocktail Trends Report • Giffard



DEMAND PLATFORM

START WITH A COCKTAIL CONSUMERS ALREADY LOVE

Giffard does not need to invent the occasion. The Margarita already owns it.

54%

of U.S. cocktail drinkers
order Margaritas

NIQ/CGA, Jan. 2026

#1

forecast global
cocktail call for 2026

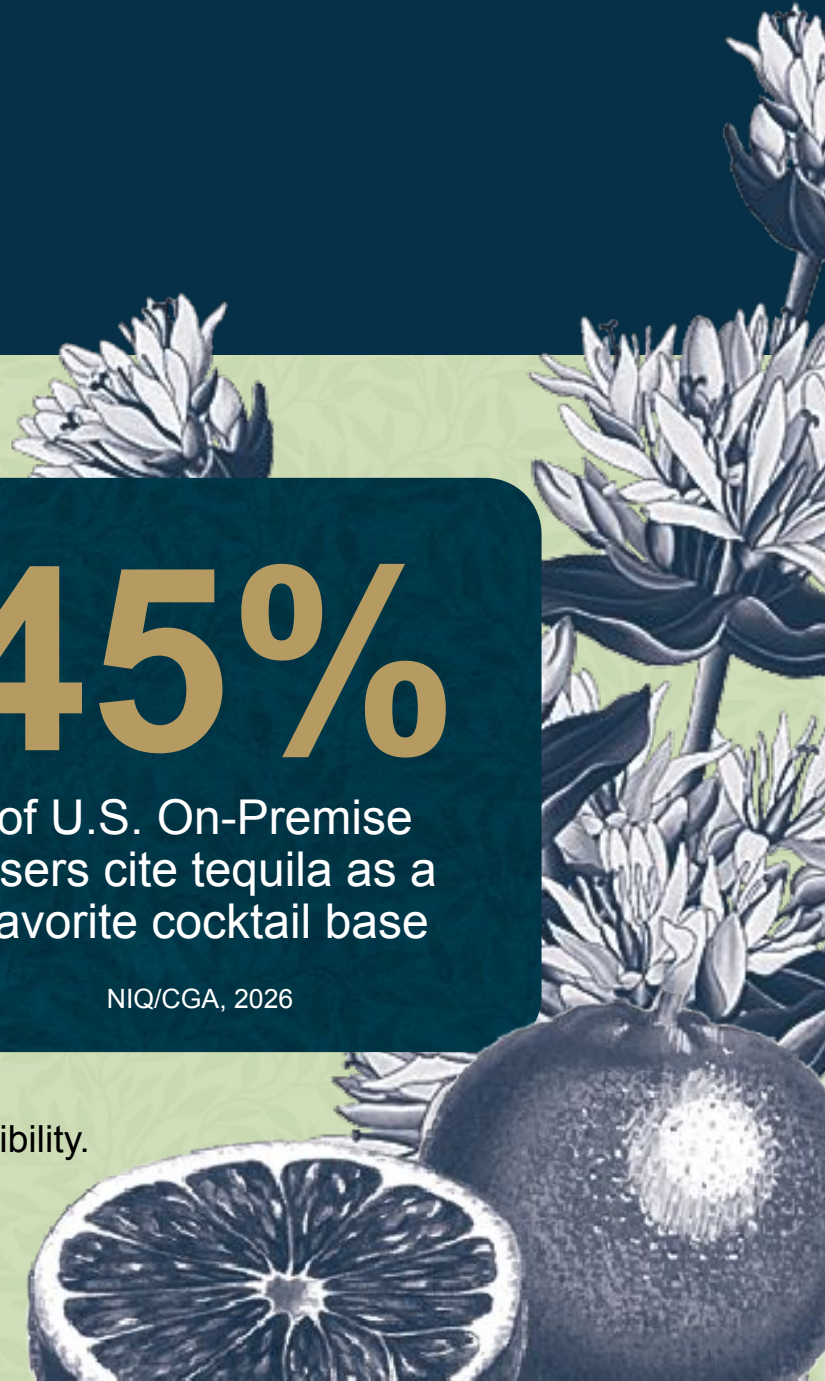
Bacardi Cocktail Trends Report

45%

of U.S. On-Premise
users cite tequila as a
favorite cocktail base

NIQ/CGA, 2026

SALES IMPLICATION → Recruit through recognition, then differentiate through alcohol-free flexibility.



CATEGORY TAILWIND

NO-ALCOHOL IS SCALING—AND PREMIUM EXPERIENCE MATTERS

The growth story is strongest when the liquid still feels like a real cocktail ingredient, not a compromise.

“Consumers want more than just an absence of alcohol.”

IWSR points to taste, complexity and the overall drinking experience as increasingly important.

GIFFARD ADVANTAGE

A branded modifier that makes the zero-proof serve feel built—not substituted.

U.S. NO-ALCOHOL FORECAST

+18% CAGR 2024–2028 volume

Close to \$5B by 2028

No-alcohol spirits are also forecast at +18% volume CAGR.

Source: IWSR, Jan. 2025





ZERO-PROOF

**NA agave +
AF Triple Sec +
lime**

A complete Margarita
architecture without alcohol.

MODERATED

**Tequila +
AF Triple Sec +
lime**

Reduce alcohol while
preserving the familiar
Margarita ritual.

MENU PLATFORM

**AF Triple Sec +
citrus / soda /
flavor**

Extend beyond Margaritas
into Cosmopolitans, spritzes
and original serves.

THE SELL-IN IDEA

Merchandise with tequila + Margarita ingredients • Train bartenders on one signature zero-proof Margarita Lead with “The Missing Ingredient” Price and present as premium cocktail-building infrastructure.



WHY ORANGE MATTERS

ORANGE IS COCKTAIL INFRASTRUCTURE— NOT A NICHE FLAVOR.

Orange liqueur connects tequila, vodka, cognac, rum and gin occasions—making it one of the most reusable modifiers behind the bar.



COMPETITIVE LANDSCAPE

THE NA ORANGE SET IS REAL—BUT STILL REMARKABLY CONCENTRATED.

Direct triple-sec alternatives are few; adjacent orange aperitifs broaden the shelf but solve a different cocktail need.



PRODUCT	POSITION	ABV	KEY CLAIM	MARGARITA FIT	ROLE
Giffard Alcohol Free Triple Sec	Direct	Confirm*	French liqueur heritage	CORE	Benchmark
Lyre's Orange Sec	Direct	<0.2%	Sweet + bitter orange	CORE	Direct

WHY GIFFARD WINS

REAL INGREDIENTS. REAL EXTRACTION.
REAL COCKTAIL STRUCTURE.

Giffard brings its liqueur-making supply chain and extraction know-how into non-alcoholic Triple Sec.

Giffard from the Liqueur Maker

- 1

ACCESS TO REAL ORANGE PEELS

A major producer of alcoholic Triple Sec already works at scale with sweet and bitter orange. Giffard’s N/A range uses the same fruits and plants used in its liqueurs.
- 2

EXTRACTED IN FRENCH WHITE WINE VINEGAR

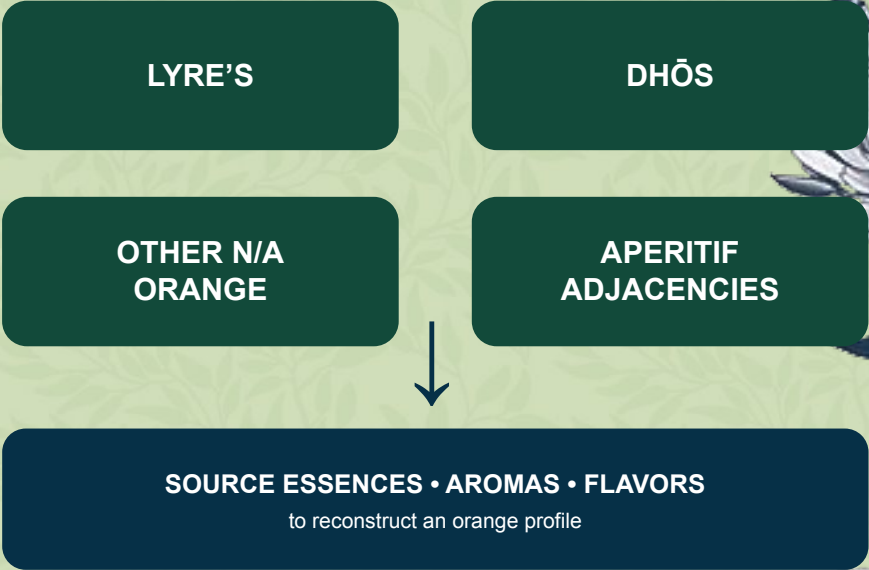
Orange peels are macerated rather than relying on flavor blending alone. Wine vinegar acts as the extraction medium in Giffard’s shrub-inspired process.
- 3

ACIDITY IS BUILT INTO THE PRODUCT

The vinegar extraction contributes balanced acid, aromatic intensity and structure—helping the modifier behave like a cocktail ingredient, not simply an orange syrup.

GIFFARD: EXTRACT THE INGREDIENT → BUILD THE FLAVOR

Competitors Flavor Reconstruction



Source: Giffard / Back Bar Project; Giffard Alcohol-Free production materials. Competitive framing is directional and should be validated against each competitor’s current ingredient statement before external publication.

GIFFARD ADVANTAGE

WHY GIFFARD IS UNIQUE

Two production disciplines. One historic French house.
A capability set that is unusually difficult to replicate.



LIQUEUR KNOW-HOW

Maceration • infusion • extraction • blending



SYRUP KNOW-HOW

Food-grade production • QC • stability • packaging

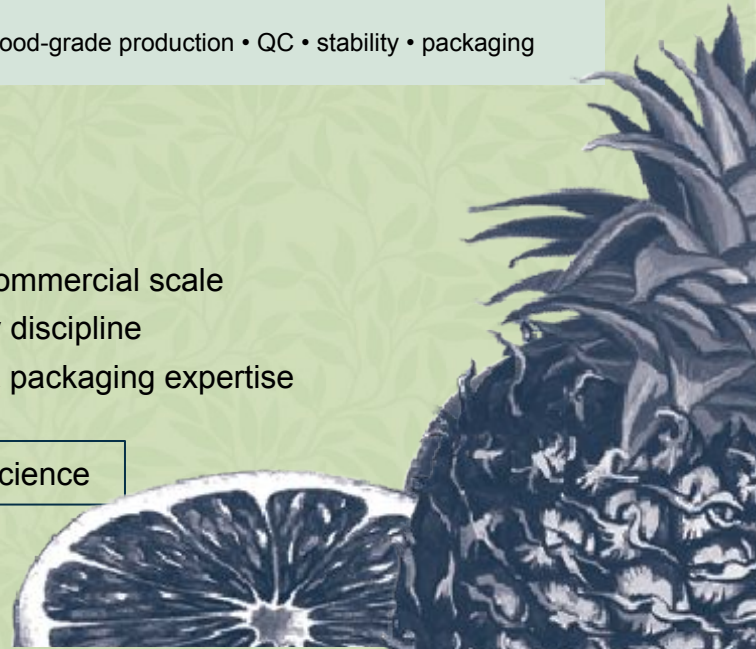
A RARE COMBINATION

Craft Extraction + Industrial Non-Alcoholic Production

- 140+ years of French liqueur-making heritage
 - Deep expertise in fruit & botanical maceration
 - Infusion, dosage, blending, filtration & sensory control
- +
- Dedicated syrup production at commercial scale
 - Food-production quality & safety discipline
 - Non-alcoholic stability, bottling & packaging expertise

THE RESULT: A Product Created At The Intersection Of Liqueur Craft + Syrup Science

Source: Giffard Maison; Giffard corporate history; Giffard syrup facility reporting; 2025–26 production expansion reporting.



COMPETITIVE PROCESS

EXTRACTION VS. RECONSTRUCTION

The clearest point of difference is not “natural vs. artificial.”
It is how the orange profile is created.



GIFFARD N/A TRIPLE SEC

Starts With The Ingredient

1

ORANGE PEELS

Same fruit/plant sourcing know-how used across Giffard liqueurs.

2

MACERATION / EXTRACTION

Peels are macerated in French white wine vinegar.

3

BUILT-IN ACID + AROMA

Extraction creates orange character while vinegar contributes structure.

EXTRACT THE INGREDIENT → BUILD THE FLAVOR

DIRECT N/A ORANGE COMPETITION

Starts With A Target Flavor Profile

LYRE'S ORANGE SEC

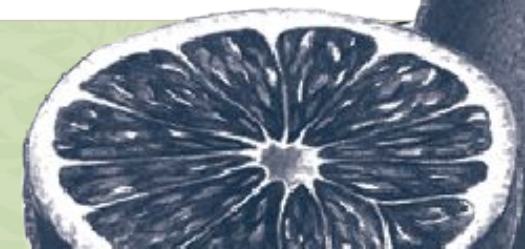
Water + sugar + natural flavours + citric/ascorbic acid + preservatives

DHÔS ORANGE

Blended from all-natural orange/tangerine/Curaçao flavors, with vanilla, citrus blossom and menthol for warmth.

FORMULATE + BLEND → RECONSTRUCT THE PROFILE

Sources: Lyre's Orange Sec official ingredient statement; Dhôs “How It's Made” and Orange product pages; Giffard production materials. Competitive language reflects public disclosures, not undisclosed upstream supplier processes.



COMPETITIVE CONTEXT

NOT EVERY ORANGE N/A PRODUCT IS BUILT THE SAME WAY.

Separating direct Triple Sec substitutes from adjacent aperitifs makes Giffard’s differentiation more credible.

DIRECT TRIPLE SEC /
ORANGE LIQUEUR SUBSTITUTES

LYRE’S

Natural flavours + added acids

FORMULATION

Closest clean
contrast

DHÔS

Natural flavors / extracted oils
+ precision blending

BLENDING

More
craft-oriented
competitor

GIFFARD
DIFFERENCE

Orange-peel maceration in wine vinegar: a traditional
extraction process adapted to an N/A modifier.

Sources: Lyre’s Orange Sec official ingredient statement; Dhôs “How It’s Made” and Orange product pages; Giffard production materials. Competitive language reflects public disclosures, not undisclosed upstream supplier processes.

FRENCH HERITAGE + N/A INNOVATION

GIFFARD CONNECTS ALL THREE CAPABILITIES

N/A here means purpose-built alcohol analogues—not conventional syrups or mocktail flavorings.



DEPUIS 1885
GIFFARD
FRANCE

1885 • 5 Generations

✓ LIQUEURS

Historic extraction & liqueur craft

✓ SYRUPS

Dedicated non-alcoholic liquid production

✓ N/A ALCOHOL ANALOGUES

Purpose-built replacements for alcoholic cocktail ingredients

LIQUEUR HERITAGE +
SYRUP EXPERTISE
= N/A INNOVATION

FRENCH HOUSE / BRAND	LIQUEURS	SYRUPS	N/A ALCOHOL ANALOGUES
Cointreau	✓	NO	NO
Combiér	✓	NO*	NO
Massenez	✓	NO	NO
Briottet	✓	NO	NO
Vedrenne	✓	✓	NO
Mathilde / Ferrand	✓	NO	NO
Gabriel Boudier	✓	NO	NO
Merlet	✓	NO	NO
MONIN	✓	✓	NO
1883 Maison Routin	NO	✓	NO

IN THIS PEER SET, GIFFARD IS THE ONLY BRAND VERIFIED ACROSS ALL THREE CATEGORIES.

*Combiér produces syrups in France, but no current U.S. distribution was identified; shown as NO for this U.S. sales presentation. Other category status reflects current public product ranges reviewed Aug. 2026.

“NO” means no current range in that category was identified in the official/public product materials reviewed. N/A excludes syrups, concentrates and ordinary mocktail flavorings.



MARGARITA PLATFORM

ZERO-PROOF DOESN'T MEAN ONE-DIMENSIONAL.

Just like the alcoholic Margarita, the N/A Margarita can flex across classic, spicy and smoky occasions—with Giffard N/A Triple Sec as the orange backbone.



STANDARD N/A MARGARITA

N/A agave spirit | Giffard N/A
Triple Sec | Fresh lime

The recognizable benchmark.



SPICY N/A MARGARITA

N/A agave spirit | Giffard N/A
Triple Sec | Fresh lime

The recognizable benchmark.



SMOKY N/A MARGARITA

N/A agave spirit | Giffard N/A
Triple Sec | Fresh lime

The recognizable benchmark.

ONE N/A ORANGE MODIFIER → MULTIPLE MARGARITA OCCASIONS

Concept builds for sales illustration. Giffard officially lists N/A Triple Sec and an N/A Spicy Margarita; Almave positions Humo as a smoky roasted-blue-agave N/A spirit.

GIFFARD TRIPLE SEC NA

MADE FOR COCKTAILS

From simple spritzes to thoughtful zero-proof classics, Giffard Non-Alcoholic Liqueurs are designed to mix beautifully.



TRIPLE SEC SPRITZ

NA Sparkling Wine | Giffard N/A Triple Sec | Sparkling Water

The recognizable benchmark.



ORANGE CRUSH

Orange Juice | Giffard N/A Triple Sec | Sparkling Wine | Soda Water

The recognizable benchmark.



LEMON DROP

White Verjus | Giffard N/A Triple Sec | Lemon Juice | Syrup | Aquafaba

The recognizable benchmark.

ONE N/A ORANGE MODIFIER → MULTIPLE OCCASIONS

GIFFARD TRIPLE SEC NA

MADE FOR COCKTAILS

From simple spritzes to thoughtful zero-proof classics, Giffard Non-Alcoholic Liqueurs are designed to mix beautifully.



MARGARITA

Lime Juice | Giffard N/A Triple Sec | Orange Juice | White Verjus

The recognizable benchmark.



ESPRESSO MARTINI

Espresso | Giffard N/A Triple Sec | Cold Brew | Demerara Syrup | Aquafaba

The recognizable benchmark.



COSMOPOLITAN

Cranberry Juice | Giffard N/A Triple Sec | Lime Juice | White Verjus | Orange Twist

The recognizable benchmark.

ONE N/A ORANGE MODIFIER → MULTIPLE OCCASIONS



THANK YOU

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