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The Grocer Guide to...

The Grocer

Alcohol



Analysis

Colour and flavour

With at-home cocktails still popular, spirits suppliers are extending their flavour ranges, while world beers and fruity ciders are also taking centre stage and the low & no category just keeps on growing

With UK consumers now facing into a cash-strapped economy, many of the habits adopted during the recent Covid pandemic lockdowns look likely to be reinstated.

Accessible self-treating and socialising at home will see the continuation of premiumisation and the cocktail culture respectively, as consumers look to weather the economic storms and impress family and friends in domestic social gatherings. And, judging by the responses to suppliers in this year's supplement, if it's pink, fruity, mixable and Insta-worthy, then you're pretty much on to a winner.

"Many new purchasing and consumption habits were formed due to the unique circumstances from the past two years," says Lauren Priestley, head of category development off-trade at Diageo. "Consumers experimented

more with different serves at home, and many discovered their inner mixologist. Whilst the on-trade has returned, we anticipate that many new habits will be retained and there will be a balance of on- and off-trade experiences. It's great to see the continued recovery of the on-trade, coupled with the resilient consumer demand in the off-trade."

The premium cocktail trend continues to be strong in the gin sector, with consumers looking to push their boundaries by experimenting with unique flavour profiles¹, says Erwin Maldonado, global chief marketing officer at Spanish gin company Puerto de Indias. "Premium spirits are performing particularly well, with forecast growth (2018-2023) at 10.4%² and over half (54%) of consumers aged 18-34 stating they would be more likely to opt for premium drinks³."

Premium cocktails at home is a trend that is continuing, as there is a huge desire to spend time together at gatherings and parties, agrees Tim Dunlop, brand director at Hammonds of Knutsford, distributor of BuzzBallz Cocktails. "Consumers are looking for simple, versatile cocktail serves that bring excitement to occasions. The colourful BuzzBallz Cocktails are a unique no-mess solution with strong visual appeal."

The rise of cocktails at home is still a major trend and there is no weakening of demand for new, interesting spirits and ingredients, believes Jamie Stewart, UK commercial director at LMB-UK, a subsidiary of French independent family company La Martiniquaise-Bardinet. "One of our big hits over the past year has been Bardinet Coffee, the first flavoured



variant of our French brandy, which is selling really well and being driven by the enduring appeal of coffee cocktails,” he says. “There’s also a trend towards traditional drinks becoming more playful with their serves to appeal to younger consumers and those looking for something new. With Glen Moray [single malt Scotch whisky], we’ve been experimenting with longer serves and mixed drinks, proving that whisky is not just a dram at the end of the day.”

Prior to the pandemic, Budweiser Brewing Group’s sales equated to a split of 70% off-trade and 30% on-trade, and the company is forecasting that it will take another year to get back to this level, notes off-trade sales director Mark Wingfield Digby. “Looking at 2022, we’re forecasting the on-trade will see a huge improvement in sales compared to 2021, mainly driven by the

lockdowns in the first four months of last year. However, while the on-trade is slowly coming back to 2019 levels, we’re still forecasting a 7.9% decrease in sales compared to 2019⁴.”

For the off-trade, however, the company forecasts a 4.3% growth⁵ ahead of 2019, with a 13.1% uplift⁶ during the 2022 FIFA World Cup.

Heineken UK points to the positive shift in off-trade performance for beer and cider in recent weeks, buoyed by the “tremendous heatwave, a flurry of events and festivals across the country and the success of sporting events such as the UEFA Women’s Euro 2022”, of which it was a key sponsor. Alexander Wilson, category & commercial strategy director, says retail sales value was up 3.4% at total market level⁷, with Heineken UK seeing an uplift of 5.5% in the grocery mults⁸. “We expect this

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Analysis

growth in the off-trade to continue throughout the coming months as households navigate the effects of the economic landscape and perhaps look to compress some of their out-of-home expenditure,” he says, adding that, in times of uncertainty, shoppers tend to look to their favourite beacon brands in the category.

During the pandemic, off-trade sales of core lagers, were up significantly⁹ compared to pre-pandemic, reveals Molson Coors Beverage Co off-trade sales director Kevin Fawell. “We are now seeing a natural rebalance as the market returns to normal. That said, Carling (the No.1 lager in Great Britain¹⁰) has grown its volume share of the core lager sub-category in grocery by 0.7% over the past 12 weeks¹¹.”

As for ready-to drink cocktails, they have almost doubled in value in the UK over the past five years¹², he adds. Molson Coors’ Miami Cocktail Company has a number of different options, such as Margarita Spritz and Bellini Spritz to cater to this market. Meanwhile the trend towards convenient RTD beverages has also translated into increasing popularity of hard seltzers, with sales increasing in value more than eight-fold in 2021¹³, he reveals. The company has an exclusive distribution partnership with premium hard seltzer brand Bodega Bay and has expanded its presence in the category with the launch of Three Fold, which has now been rolled out on draught in the on-trade to increase category visibility.

For Brothers Cider the reopening of the on-trade has been a welcome development, says head of marketing Nicola Randall. “Not only have we seen a 50% increase in on-trade spending compared to 2020¹⁴ but the overall cider category has been performing strongly, with fruit cider increasing in value by 4.1% over the last year¹⁵.”

She notes that cocktails are “an engaging and playful way for consumers to experiment and be curious with our range of flavours. Many consumers gained new drink-making skills during the pandemic and they can now come back to these when they need to play, create or impress¹⁶,” she adds. As such, the Brothers website has a range of cocktails that consumers can try using its most popular SKU, Toffee Apple. (page 6 →)

Low & no continues to drive NPD

With consumers keen to focus on health & wellbeing, it has become evident in the past few years that the low- & no-alcohol trend is no passing fad.

If alcoholic drinks companies have not already taken this message to heart, then they are likely to be missing a trick, as even the biggest brand companies are now keen to launch low or no-alcohol versions of their established brands to continue to cater to their loyal followings and, importantly, attract the attention of the younger generation.

According to Molson Coors off-trade sales director Kevin Fawell, the number of consumers reducing their alcohol intake has increased gradually over the past four yearsⁱ and 14% of households have purchased a no- & low-alcohol drink this yearⁱⁱ, with 3.1m consumers now drinking low- & no-alcohol beveragesⁱⁱⁱ. “More than a third of people are currently trying to moderate their drinking^{iv}... so having a good balance of

low- & no-alcohol options is becoming increasingly important.” As such the company offers Doom Bar Zero amber ale, Cobra Zero lager and Rekorderlig Alcohol Free Cider.

With 70% of consumers agreeing they are proactively trying to live a healthier lifestyle^v, and 68% of UK drinkers saying they have tried a low- & no-alcohol beverage^{vi}, the category has continued its growth, says Heineken UK category & commercial strategy director Alexander Wilson. “Penetration has been the driving force of low- & no-alcohol growth over the past five years but there is scope to grow further,” he says. Wilson points out that beer and cider are purchased by 72.8%^{vii} of households in the off-trade, while non-alcoholic beer and cider, although growing, are bought by just 12.6%^{vii}. Heineken 0.0 continues to lead the low- & no-alcohol category with a 27.3% share of non-alcoholic beer^{viii}, he says, adding that craft brands are

also on the rise. The company launched Old Mout Pineapple & Raspberry Alcohol Free into the cider category and offers Moretti Zero as an alternative lager choice for drinkers, he adds.

More and more beer drinkers are looking to moderate their alcohol consumption without eliminating it entirely, agrees Budweiser Brewing Group off-trade sales director Mark Wingfield Digby. As the low & no category is continuing to grow, the company has capitalised on its Corona brand ethos with the introduction





of Corona Cero, he says.

The pandemic provided consumers with time to reflect on their values and how their purchases contribute to wellbeing^x, believes Brothers Drinks Co head of marketing Nicola Randall. “The low & no category therefore continues to grow, with many consumers now looking to reduce their alcohol consumption as part of adopting a more balanced lifestyle. As such, the category has risen from £22.8m in value last year to £28.9m in the latest year^x.”

“Low & no cider tends to attract a more affluent and younger shopper than its parent category^{xi}, so the addition of Toffee Apple Alcohol Free to the Brothers portfolio has strengthened the brand’s relationship with its Gen Z and Millennial audience by empowering them with the choice to go alcohol-free.

“As the category continues to grow, flavour innovation will be a driving factor, as consumers will want to experiment more with new and unusual low & no flavours that offer a level of

premium indulgence. We can expect the category to continue growing in demand and flavour variety.”

The low & no category has been growing steadily in popularity over the past few years, and becoming more recognised and respected as more options and choice have been introduced, says Diageo head of category development Lauren Priestley. “Gordon’s 0.0% is now the top-selling non-alcoholic spirit in the off-trade^{xiii},” she says. “We recently launched Gordon’s

Premium Pink 0.0% to provide consumers with even more quality choices. As part of our portfolio, we also offer Seedlip, Tanqueray 0.0% and Guinness 0.0%.”

Despite the sector’s growth, however, Heineken’s Wilson makes the point that, with the low & no category being unfamiliar to many shoppers and difficult to find, there are improvements that can be made in merchandising the category. He recommends creative points of sale that disrupt traditional category

flows to catch shoppers’ attention, as well as clear signage, so that shoppers can find what they are looking for quickly and efficiently. “In 2022, we created select zones in retailers such as Sainsbury’s to signpost the range on offer in-store and educate shoppers on the benefits of choosing these options, he reveals. “These zones can also serve to increase visibility of the alcohol-free range and drive sales for the category and we plan to double our initiatives in this area in 2023.”

Analysis

Strong flavour trends

“Flavour innovation continues to drive excitement and recruit consumers to the beer, wine & spirits (BWS) market,” says Diageo’s Priestley. “Flavoured vodka is experiencing some of the fastest growth at +51.9%¹⁷ and we’ve introduced a series of innovations from the world’s number one vodka brand¹⁸, Smirnoff, to help drive this trend. Smirnoff Raspberry Crush (37% ABV), Smirnoff Mango & Passionfruit Twist (37% ABV) and latest launch, Smirnoff Berry Burst (37.5%).

Gin also remains a popular choice and Gordon’s has been introducing new variants, such as Gordon’s Premium Pink Distilled (38% ABV) – “the most successful new spirits product development in Great Britain in the last decade¹⁹”, she adds. “More recently the brand has launched Gordon’s Tropical Passionfruit Distilled Gin and Gordon’s Morello Cherry (both 37.5% ABV).”

Flavours are certainly in favour at Puerto de Indias. “Recently, flavoured spirits have driven sector growth, with the category forecast to increase volumes by 2.3% CAGR in the UK from 2021 to 2025²⁰,” says Maldonado. “This comes following increased consumer demand for unique and experimental flavours to their traditional drinks offerings²¹. Within the gin market, in particular, strawberry has been voted the UK’s favourite flavour, with more than one in five (21.9%) consumers saying they’d pick it over any other flavour when shopping²².” The company has capitalised on this with its Strawberry Gin and plans to introduce a Blackberry Gin to the UK in the autumn.

At Pernod Ricard UK, the latest flavour launch for Beefeater Gin – Rhubarb & Cranberry – was also selected based on top-trending flavours in the UK, says the company. The new product will be available from September in Asda and Waitrose, as well as selected on-trade venues.

Innovation in flavour is also a key component in Brothers’ brand strategy, says Randall, with the brand launching its first, new-to-market Cherry Bakewell SKU this year. “As consumer demand for innovative flavours continues to increase and with cherry trending at +32% in the categories of strongest and future flavours to watch²³, this is an exciting addition to the Brothers portfolio,” she adds.



As a spirits producer, LMB-UK believes that NPD is important to keep customers and drinkers engaged and excited by its products – and has been focusing on developing new expressions to do this. Its Glen Moray brand has “always been experimental with flavours and finishes, using unusual casks for maturation to give whisky drinkers something new and unexpected”, reveals Stewart. This includes the company’s more premium Warehouse 1 range.

In addition, next year, it will be introducing Porto Cruz to the UK. “While port will always be enjoyed as a drink for sipping after dinner, we’ve had a great response from consumers to our ‘Cruz Fresco’ proposition, which mixes Porto Cruz Pink, tonic water, garnish and ice in a refreshing drink,” he says.

Budweiser Brewing Group sees opportunity in flavours, particularly in the alcoholic sparkling water category, which Wingfield Digby says is forecast to reach £600m by 2025²⁴. Its Corona Tropical brand taps into this trend with three flavours: Guava & Lime, Raspberry & Lemon and Grapefruit & Lemongrass.

Meanwhile, across all categories, the consumer focus on quality is driving premiumisation in the market.

Diageo’s Priestley says premiumisation has been a steady trend for some time, with consumers drinking better, not more²⁵. “In fact, Diageo’s super-premium-plus brands are up 31%²⁶,” she notes.

Heineken UK’s Wilson also reckons consumers are continuing to demand better-quality drinks, with many



adding premium beers and ciders to their repertoires at home during Covid and continuing to buy into the category in 2022. He believes this will grow considerably in the years ahead. The company's premium Italian Birra Moretti lager is "one of the fastest share growth brands in the market (+0.6% YTD²⁷) and continues to ride the wave of demand for premium continental lager".

At Molson Coors, Fawell also points to the growing popularity of world lagers, which he says are "massively on the up, accounting for almost one-third (30.7%) of draught lager sales last year²⁸". As such, demand for the company's Spanish lager Madrí Excepcional has been huge, he says, and that momentum encouraged the company to launch the brand in the off-trade earlier this year.

He also points to the premiumisation trend. "Consumers are willing to pay extra for a more premium choice when they are socialising at home²⁹ and world beer, super-premium cider and premium ale are all growing ahead of the core category³⁰," he says.

Budweiser Brewing Group is also focusing on world lager, in particular unfiltered lager, a category growing in popularity across Europe and relatively untapped in the UK. It has introduced Stella Artois Unfiltered to tap into world lager, which it says is has gained 1.8ppts value share compared to 2019³¹.

Meanwhile, in the wine category, Pernod Ricard UK believes premiumisation will continue to be driven by consumers' desire to treat themselves to accessible luxuries, despite the fact that inflation and the increased price of goods are squeezing consumers' wallets. "In-home socialising is a trigger to drive trade-up, so it's crucial to stock the right range of premium wines to capitalise on this behaviour," says the company's wine portfolio director Lucy Bearman.

Category drivers ahead

"During festive social occasions, such as Halloween or Christmas, consumers tend to indulge in luxuries or unusual flavours they may not consume throughout the rest of the year," says Brothers Drinks Co's Randall. The company is preparing to launch a Halloween out-of-home campaign to encourage consumers to 'think outside the bottle' and get inventive with their cider, focusing on its Toffee Apple and Toffee Apple Alcohol Free SKUs.

BuzzBallz is anticipating a bumper festive season, as there will be so many opportunities to tap into from early November, when the FIFA World Cup tournament kicks off, says Hammonds' Dunlop. "At-home gatherings, whether for football viewings or festive drinks, are going to be a lucrative area for retailers. Ready-to-drink cocktails are ideal for this time of year, especially for consumers looking for casual, accessible, affordable and fun drinks."

Tapping into seasonal and cultural moments will always be key to engage with consumers and aligning brands with occasions is vital, says Diageo's Priestley. "Category-driving moments like the upcoming FIFA World Cup work well for brands like Guinness, which

has strong ties to sport already."

The company also put inclusivity into the heart of treating events with the launch last year of the Baileys Witches campaign for Halloween, developed in partnership with the company's LGBTQ+ employee group, the Rainbow Network and featuring three of the UK's most popular drag queens.

Inclusivity is also on the agenda at Puerto de Indias, which launched a new LGBTQ+ themed rainbow Puerto de Indias bottle in support of those communities, marking its first 'Unlimited Edition' as the bottle is available all year round. In addition Maldonado anticipates flavoured spirits will drive category growth over the next few months "with seasonal flavours dictating consumer demand".

Amidst the focus on products and NPD, one interesting development is the growth in e-commerce and how brands and retailers work together to make this a great experience for online shoppers, says LMB-UK's Stewart. "We invested in our Amazon brand stores during lockdown, which are working extremely well and supporting growing online sales. It will be interesting to see how we can bring these insights and strategies to work in partnership with grocers to offer a similar seamless e-commerce experience for consumers in the future."

Sources

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- ⁴⁻⁶ Budweiser Brewing Group forecasts
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- ¹⁰ IRI and CGA GB data, Value sales, value share of category, 12 weeks to 26.03.22
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- ¹² Wine and Spirit Trade Association Market Report, 2021
- ¹³ See 9
- ¹⁴ Westons Cider Report, 2022
- ¹⁵ IRI Data, 19.07.21-18.07.22
- ¹⁶ Mintel, Global Consumer Trends, 2022
- ¹⁷ CGA & Nielsen Headline Summary Report p13 2021, data to 01.01.22
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- ¹⁹ Based on ERSV in the first 14 weeks since launch in the off-trade only. Data provided by Nielsen Scantrack and dated back to 01.06.07
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- ²⁹ Kantar Worldpanel, Alcovision, 12 m/e 31.03.21
- ³⁰ Nielsen, 12 weeks to 30.01.21 Total Coverage
- ³¹ Total On-Trade, % Value Share to 14.08.21 vs 2YA

Low & no panel

- ⁱ Kantar Worldpanel, Alcovision, Rolling 12 m/e data to 30.06.21
- ⁱⁱ Kantar, FMCG Panel, 52 w/e 15.05.22
- ⁱⁱⁱ CGA BrandTrack, April 2022
- ^{iv} See i above
- ^v CGA Brand Track, October 2021
- ^{vi} Portman Group research 2021
- ^{vii} Kantar Worldpanel Online to 07.08.22, Total Coverage
- ^{viii} Nielsen ScanTrack, MAT to 13.08.22
- ^{ix} See 16
- ^x Westons Cider Report 2022
- ^{xii} Nielsen Scantrack, Total Off Trade, w/e 19.12.20 to w/e 23.01.21

Brothers Drinks Co

Refreshing innovation

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KEY BRANDS

Brothers

“Innovation is integral to the Brothers Cider brand strategy, as we know demand for innovative flavours is still going strong with 42% of cider drinkers expressing an interest in more unique flavours, and this rises to 48% amongst 25- to 54-year-olds¹,” reveals Nicola Randall, head of marketing at Brothers Drinks Co.

“Earlier this year Brothers launched Cherry Bakewell, an exciting cider full of cherry flavours with a hint of frangipane, emulating the quintessential British tart. With cherry trending at +32% in the categories of strongest and future flavours to watch², this flavour was the perfect fit to introduce to our portfolio, and tapped into the patriotic spirit of the nation during the Queen’s Jubilee this summer.”

Festivals are in Brothers’ DNA, and as the official cider provider of Glastonbury Festival 2022, the company launched Brothers Festival Apple, which was poured at stalls during the festival, says Randall. “A refreshing, medium dry cider made from the juiciest bittersweet Somerset apples, this variant is well-placed to capitalise on the trend towards apple cider,” she notes.

The low & no category continues to grow with many consumers looking to reduce their alcohol consumption as part of adopting a more balanced lifestyle – in fact, 6% of consumers now engage with low & no cider³, explains Randall. “Last year we launched our first alcohol-free variant, Toffee Apple Alcohol Free, to ensure our customers continue to enjoy our exciting flavours if they choose not to drink alcohol, without compromising on taste.



“We can expect innovative low & no variants to grow in popularity and variety this year”

We can expect innovative low & no variants to grow in popularity and variety this year.

“This year at Brothers, we took our curious mix message one step further and have launched our Making Weird Wonderful Out of Home campaign, encouraging consumers to ‘think outside the bottle’ and get inventive with their cider,” she adds. “The campaign is supported online across our social media channels to maximise visibility, targeting competitor drinkers and will be seen by over 45m people during the summer.

“With 47% of consumers being cider drinkers⁴, there is plenty of opportunity to engage them. Retailers can capitalise by stocking a wide range to cater to this demand and capture new customers. For in-store merchandising retailers should incorporate eye-catching and disruptive in-store displays to attract consumers and to increase basket spend.

“The Brothers packaging is purposely bold and impactful, and our flavour range allows us to be creative, providing stand-out on shelf. Consumers will be more likely to buy in bulk for occasions, so stocking a variety of formats will help to maximise sales.”



Source

- ¹ Lightspeed/Mintel 2020
- ² Doehler Alcoholic Flavour trends, No of Launches 2021
- ³ Westons Cider Report 2022
- ⁴ Mintel, Cider UK, 2022

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Budweiser Brewing Group UK&I

Making waves in the off-trade

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KEY BRANDS

Corona
Stella Artois
Budweiser
Bud Light
Camden

↙ The world beer segment continues to grow in popularity, Corona has led this trend with volume sales growth of 38.7% since 2018¹, says brand owner Budweiser Brewing Group. The popular brand has retained its position as the UK's No.1 world beer brand², it notes.

“As the Corona brand grows, so does its customer offering and 2022 has been all about innovation,” explains the company. “The brand launched two new products into the off-trade, including an alcohol-free version of Corona, Corona Cero, and a new alcoholic sparkling water with real fruit juice*, Corona Tropical.

“Both launches allow customers to tap into emerging consumer trends with a product that has the power of the Corona brand behind it.

“When consumers are looking to branch into new categories, they look for well-known brands that they trust to deliver on taste and quality. Corona Tropical and Corona Cero provide retailers with a super-premium option that will help grow the alcoholic sparkling water and no-and-low category and ultimately help customers boost sales.”

Corona Tropical

The alcoholic sparkling water category is forecast to reach £600m by 2025³, reveals the company.

“Corona Tropical taps into this growing market with three exotic flavours: Guava & Lime, Raspberry & Lemon, and Grapefruit & Lemongrass. The brand is a 4.5% ABV, vegan and gluten-free product that contains 96 calories per 330ml can with no added sugar.

“The launch allows retailers to offer consumers an extra-refreshing alternative from a brand they already know and trust to deliver on taste and quality.

“The launch of Corona Tropical is a super-premium innovation which meets the increased consumer demand for sparkling alcoholic beverages, as well as giving retailers the opportunity to tap into this growing category.”



“As the Corona brand grows, so does its customer offering and 2022 has been all about innovation”



Corona Cero

As the no & low category continues to grow, more and more beer drinkers are looking to moderate their alcohol consumption without eliminating it entirely, adds the company.

“Corona Cero is an alcohol-free version of Corona that allows everyone to enjoy their favourite beer anywhere, anytime. True to the Corona ethos, Corona Cero is brewed with the same 100% natural ingredients – water, barley malt, maize, sugar, hops and natural flavours and is best served ice-cold with a wedge of lime. The original brewing method and ingredients allow Corona Cero to keep its classic refreshing taste minus the alcohol.”

Corona has supported both launches with a 360-degree marketing campaign which included OOH and digital, in-store activations and trial-driving initiatives, both in-store and e-commerce, as well as national TV placements promoting Corona Cero. “Key to Corona’s marketing campaign is demonstrating to shoppers they can get the same quality and refreshing taste they expect from the Corona brand,” adds the company.

Corona Tropical and Corona Cero are both available nationwide across grocery and convenience channels. Speak to your sales manager about stocking up today.

Source

^{1,2} Nielsen Scantrack, w/e 13.08.22

³ Nielsen, data from 2019/10-2020/08

*fruit juice from concentrate

NEW



ALCOHOLIC SPARKLING WATER WITH REAL FRUIT JUICE*



**OVER 90% OF ALCOHOL DRINKERS
WOULD TRY CORONA TROPICAL**

STOCK UP NOW

Source: BBG Consumer Survey (n=21,431)

*fruit juice from concentrate

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be [drinkaware.co.uk](https://www.drinkaware.co.uk)

Please drink responsibly, +18.

BuzzBallz Cocktails

BuzzBallz bounce into UK

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KEY BRANDS

BuzzBallz Cocktails
– Choc Tease
– Tequila 'Rita
– Strawberry 'Rita
– Lotta Colada
– Chili Mango
– Espresso Martini

**all 200ml, 13.5% ABV and 243 to 295kcal/ball RRP £3.75 each. BuzzBallz are fully recyclable and use 15% recycled plastic in their construction.*

Following huge success in the US, ready-to-drink (RTD) cocktail brand BuzzBallz Cocktails is being rolled out in the UK now. The brand has proved a smash hit in the US and is on target to sell 100 million balls this year, reveals distributor Hammonds of Knutsford. Now these unique, premium, bar-strength cocktails are set to break into UK retail.

Pre-mixed cocktails are expected to increase share of the RTD market¹, so BuzzBallz Cocktails present a significant opportunity for the UK drinks sector, especially when consumers are looking for new and unusual options, it says. RTDs are convenient and versatile for grab-and-go impulse purchases as the format is highly portable, consumable and recyclable – ticking lots of boxes while meeting the taste expectations of today's discerning consumers.

Let's get together...

"We know there is a huge desire to spend time together and our UK launch strategy is to target 25- to 40-year-olds living in urban areas, who enjoy on-the-go lifestyles, socialising with friends, going to parties, attending events and festivals, or simply hanging out in the home or garden.

"Simple, versatile serves that bring excitement to the occasion are the order of the day as consumers are seeking out new products to share. The colourful BuzzBallz Cocktails range provides a fantastic opportunity to drive sales and to bring something fresh to drinks aisles.

"Made with premium spirits, and bursting with real fruit juice, natural flavours and ingredients, they are fun, different and great for sharing – plus they have visual appeal with the unique round shape so play into the target audience's love for social media, and sharing.

"Consumers are open to RTDs and canned cocktails for at-home drinking. They're looking for products that are ready-to-drink, highly portable and convenient, while still meeting their flavour expectations.

"The BuzzBallz Cocktails range offers



“RTDs are a fast-growing category, yet the market is crying out for more innovation and excitement”



something unique and innovative to shoppers, being disposable, versatile and suitable for multiple occasions. Their round format really drives impulse purchase, and they are one of the few top-quality, bar-strength cocktail options in the drinks aisle.”

Enjoying the buzz

BuzzBallz Cocktails' founder Merrilee Kick created the range at her kitchen table over 12 years ago. She says: "RTDs are a fast-growing category, yet the market is crying out for more innovation and excitement. With BuzzBallz Cocktails, we've created a real buzz in the US and we know the UK has every potential to follow in its footsteps, with the right brand proposition and quality credentials.”

BuzzBallz Cocktails will help retailers drive sales for both planned and impulse purchases – it is the No.1 selling single-serve pre-mixed cocktail brand in the US convenience channel², adds the company. Extensive branded POS materials are available to support the UK launch including counter and chiller racks, free-standing display units and eye-catching signage to create a buzz in the retail environment.

Source

¹ IWSR 2021, <https://tinyurl.com/2p9xsdp2>
² Nielsen, XAOC + Combined Liquor + US Convenience, 52 w/e 26.12.20



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KEY BRANDS

Seedlip
Gordon's 0.0%
Gordon's Premium
Pink 0.0%
Tanqueray 0.0%
Guinness 0.0%

Many consumers are more mindful and conscious than ever about what they consume, with a growing number choosing to explore new quality drinking experiences, says Lauren Priestley, head of category development off-trade at Diageo. "We have had an exciting time of innovation within the no & lower category, ensuring that our alcohol-free options provide consumers with even more choice," she says.

Year-round opportunity

While still a relatively new category, the no & lower moment is becoming an established and respected option for many. Sales of no- & lower-alcohol drinks are expected to grow by 17% this year¹, mainly driven by adults aged under 45 years old, as they account for over a quarter of all spend in the non-alcoholic category, vs 18% total alcohol². These consumers' exploration of the no & lower category is year-round, with a growing focus on consistency around balanced choices and wellbeing.

Quality drinking experiences

"Consumers want to try something new and different, and 32% of adult consumers have bought no & lower alcohol alternatives in the last six months³," says Priestley. "Seedlip, the world's first distilled non-alcoholic spirit, which proudly solved the dilemma of 'what to drink when you're not drinking', is arguably one of the more recognised alcohol-free brands. It paved the way for high-quality non-alcoholic options and set the bar high for the category. No & lower spirits is now the fastest-growing segment within the alcohol-free category⁴, and with more consumers looking to no & lower options, the opportunity to create a category with choice is key.

"Consumers, keen to explore new drink experiences, have high expectations when it comes to quality and taste profiles, so brands have had to step up their innovation and the range of choice they offer. We've steadily expanded our alcohol-free range and, last year, we launched Gordon's 0.0%, which is now the top-



"No & lower spirits is now the fastest-growing segment within the alcohol-free category"

selling non-alcoholic spirit in the off-trade³. To build on this momentum and cater to fans of Gordon's Premium Pink Gin, we recently launched Gordon's Premium Pink 0.0% Alcohol-Free Spirit – a vibrant pink liquid that balances the sweet flavours of raspberry and strawberry with tangy redcurrant and the finest distilled botanicals.

As part of our growing alcohol-free portfolio, Tanqueray 0.0% offers a premium option, delivering Tanqueray's distinct blend of four quality botanicals, which are steam-distilled to give a complex yet refreshing taste of juniper that the brand is known for," says Priestley.

"While no & lower spirits lead the category, the no & lower beer segment is also growing by 18.3%⁵. Last year, we made the bold move to introduce Guinness 0.0%, ensuring that we are offering as much choice and inclusive drinks options as possible, while delivering quality taste credentials. Guinness 0.0% offers everything Guinness does, just without the alcohol.

"Working with the latest consumer insights, assessing customer needs and leveraging our quality assured brands, we will continue to develop choice that underpins the no & lower category, providing quality options for many different occasions."



Source

- ¹ IWSR Drinks Market Analysis
- ² Kantar Alcovision, Total Trade, 1 m/e 31.01.22
- ³ Nielsen Scantrack, Total Off Trade, w/e 19.12.20 to w/e 23.01.21
- ⁴ Nielsen, Off trade, MAT to 16.07.22
- ⁵ Nielsen Scantrack, Total Coverage, Year to 04.12.21



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KEY BRANDS

Heineken®
Heineken Silver®
Strongbow® Ultra
Dark Fruit
Inch's® Apple Cider
Old Mout®

 Heineken UK continues to add strength to its portfolio of brands with the launches of Heineken Silver and Strongbow Ultra. These two brands saw some of the company's biggest investment to date, unlocking a surge of new sales for retailers nationwide, says Heineken.

Heineken Silver

"Heineken Silver has been launched across Europe in 2022 and will be Heineken's biggest beer launch of the decade, tapping into the growing popularity for premium and lighter style drinks," says Alexander Wilson, Heineken UK category & commercial strategy director. "With lager under-indexing with Gen Z and Y shoppers, we spotted an opportunity to create a beer that these younger adult consumers would not only buy, but also seek out. Heineken Silver, an extra-refreshing lager at 4% ABV, already bridges this gap and significantly over-indexes with younger shoppers¹. It is made using an ice-cold brewing process at -1°C, with a low bitterness of 10 IBUS² and a lighter drinking profile."

Strongbow Ultra Dark Fruit

"As Britain's No.1 cider brand³, Strongbow is always looking for ways to expand its first-class portfolio," adds Wilson. "Strongbow Ultra Dark Fruit opened a new opportunity in the cider category, and early sales data is beyond expectation as it grows in popularity with younger adult drinkers⁴."

The launch of Strongbow Ultra Dark Fruit benefited from a multi-million-pound national marketing campaign that encouraged people to Drink the G.O.A.T. – a playful, tongue-in-cheek approach centred on the pop-culture acronym, Greatest of All Time, and featuring a purple goat.

Old Mout

Old Mout Pineapple & Raspberry Alcohol Free is the latest innovation from the cider brand, offering more flavour choices for consumers in the no- & low-alcohol cider category.

Wilson continues: "68% of UK drinkers have tried a low- & no-alcohol



Launched across Europe in 2022, Heineken Silver will be the company's biggest beer launch of the decade"



beverage⁵. There is a great opportunity to increase sales in this category, as consumers frequently stay brand-loyal in stores. Retailers and brands need to meet the demands of drinkers looking to moderate their alcohol intake – or they risk losing out.

Inch's

"Consumers are eager to reduce their environmental footprint through their shopping habits, with 40% of shoppers looking for brands with environmentally sustainable values⁶," explains Wilson.

Made from 100% British apples, Inch's Cider has seen roaring success, being bought by over 750,000 shoppers⁷ since its 2021 launch, he notes.

"With apples grown and harvested within 40 miles of the mill and all apple waste turned into green energy, it is particularly popular among Gen Z and Y drinkers, who are particularly influenced by brands' environmental and sustainability credentials⁸."

Source

- Nielsen ScanTrack to 02.07.22, 1wk Database
- International Bitterness Units
- Kantar WPO, MAT to 26.12.21, Total Market (off-trade)
- Nielsen ScanTrack to 02.07.22, 1wk Database
- Portman Group research 2021
- Statista.co.uk 2022
- Kantar data 2022. 52 w/e 07.08.22
- CGA Strategy, 01.01.22

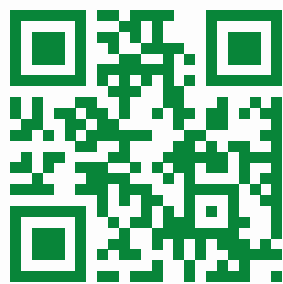
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Commercial Director

KEY BRANDS

Bardinet Brandy
Glen Moray Single Malt Scotch Whisky
Cutty Sark Blended Whisky
Label 5 Blended Whisky
Porto Cruz
Marie Brizard

Today's spirits drinkers are looking for the best of both worlds: the quality, tradition and story of heritage brands, but also new flavours and products to enjoy and experiment with at home – not forgetting prices to suit all pockets.

Jamie Stewart, commercial director of LMB-UK, which has top 10 brands¹ such as Glen Moray single malt whisky and Bardinet Brandy in its portfolio, says an ability to meet these diverse consumer needs now defines grocery success.

As the UK subsidiary of independent French, family-owned La-Martiniquaise-Bardinet (the world's 7th-largest spirits group), the company's brands are rooted in authenticity, maker expertise and heritage, says Stewart. However, the secret to category growth is to never sit still and to keep the ever-evolving tastes of consumers front and centre, he says.

“At LMB-UK we have very loyal drinkers who enjoy the quality and accessibility of brands like Glen Moray and Bardinet – both of which are performing well in grocery, with Glen Moray Classic outperforming the total spirits market and becoming the UK's No.7 best-selling single malt²,” he says.

A trend for more experimentation

“But global events have changed drinking habits. There's more experimentation and ‘cocktails at home’, alongside current cost-of-living challenges. Brand investment and innovation to excite and engage drinkers is critical to stay competitive.

“With Glen Moray, for example, we often encourage people to try new cask finishes and serves, from unusual drams to long mixed drinks. A recent summer drinking campaign gave people inspiration as to how to make Elgin Classic cocktails with light summer flavours – a bold message but one that boosted sales over the season.”

The group's Bardinet Brandy, the second-largest brandy brand in the UK³, is in double-digit growth across the UK off-trade⁴. A campaign last year encouraged consumers to create a French ‘Apero’ brandy moment, plus



“Global events have changed drinking habits. Brand investment and innovation to excite and engage drinkers is critical to stay competitive”

the recent Bardinet Coffee launch appealed to drinkers love of coffee cocktails. Further trade support with shippers and a national radio campaign are planned for the important Q4 season this year.

Introducing Porto Cruz

The breadth of the LMB-UK portfolio is also top of Stewart's mind.

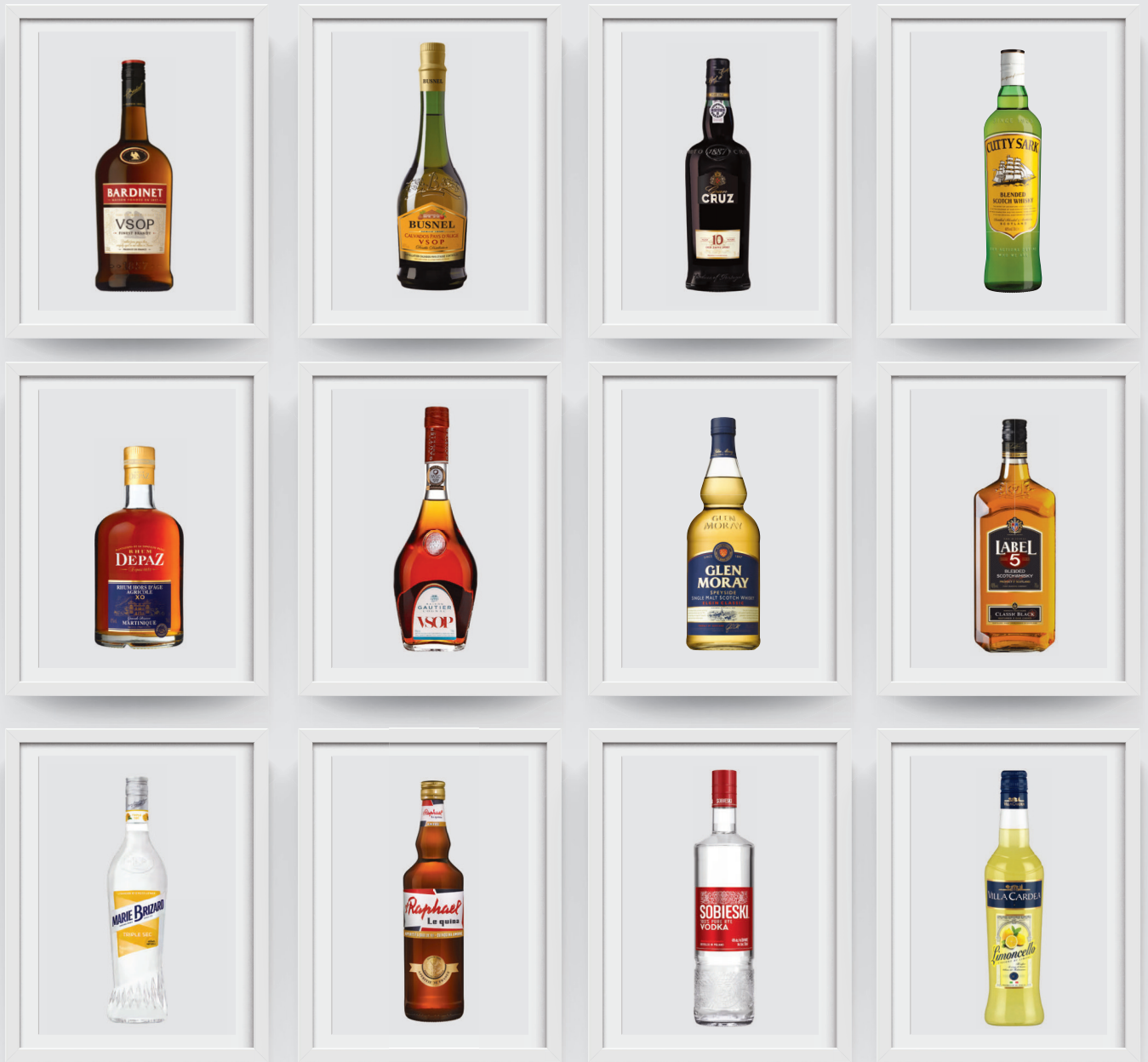
“We're very excited to be bringing something genuinely new to the UK market with Porto Cruz, the world's best-selling port brand⁵. While port will always be enjoyed after dinner, we've had a great response to our ‘Cruz Fresco’ proposition, which mixes Porto Cruz Pink and tonic water with ice and a garnish.

“Our fast-growing French craft liqueurs and syrups brand Marie Brizard is also a focus in the UK, perfect for adventurous drinkers looking to try new tastes and experiences at home.”

Source

^{1,3} Nielsen, Total Spirits Report, 52 MAT 03.07.21-02.07.22
⁴ UK Grocery EPOS YTD 01.01.22-21.08.22
⁵ The IWSR 2022

Meet the family



As the world's 7th* largest spirits producer, LMB is family owned and managed, with all the skill and passion of our founders passed down to today's generations. At LMB-UK we're proud to share our growing range of high quality branded and own label spirits, wines and liqueurs with our UK customers. So if you haven't met all the family yet, we can't wait to introduce you!

To find out more please get in touch with our UK sales team at sales@glen-moray.co.uk



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*Top 10 premium spirits markets worldwide, Impact 2021

Molson Coors Beverage Company

Balance is key to growth

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Cobra
Coors
Madri Excepcional
Pravha
Blue Moon Mango Wheat
Atlantic Pale Ale
Sharp's Doom Bar
Staropramen
Aspall Cyder
Rekorderlig Cider

Getting the balance right between core and premium brands is the key to an effectively stocked beers, wines and spirits shelf, says Kevin Fawell, off-trade sales director at Molson Coors Beverage Company. "Over the past year we have seen clear trends develop within the beer and cider category," he notes. "One of those is the ongoing demand for more premium options. As a result, world beer, super-premium cider and premium ale are all growing ahead of the wider beer and cider category¹.

"That's part of the reason behind the success of Madri Excepcional since its roll-out in the off-trade in March 2022. The modern European-style lager delivered £6m in sales within the first 12 weeks after launch² and we expect this trajectory to continue.

"World lagers have been a big source of growth within the market over the past year and are increasing value share ahead of all other categories³. That trend has also seen Staropramen grow faster than all brands above it and increase value sales by 24.5%⁴.

"As for super-premium cider, consumers have become more willing to pay extra for a more premium choice when they're socialising at home⁵," he adds. "Products like Aspall Cyder are increasingly popular, growing its share of total cider sales in retail (+0.2ppts)⁶.

"We invested £13m in Aspall earlier this year, including a three-year renovation project to increase capacity at the Aspall Cyder House by nearly 60% – the equivalent of 70 million pints each year – as well as a comprehensive media campaign, with its first-ever TV advert."

Premiumisation trends also extend beyond beer and cider, so Molson Coors is looking for opportunities to expand



“World lagers have been a big source of growth over the past year and are increasing value share ahead of all other categories”



its portfolio into new areas to help retail customers capitalise on this demand.

"In 2021 we launched our Beverage Hub, a dedicated team focused on new and emerging categories. This has led to us expanding our portfolio into cocktails, premium spirits, low- & no-alcohol and adult soft drinks, as well as become one of the first entrants to the hard seltzers market, striking a UK distribution deal with Bodega Bay and rolling out Three Fold in 2021.

"However, consumers are not turning their back on core options. Core lager still accounts for 27.7% of total off-trade lager sales⁷. Within this, Carling is the No.1 lager brand in Great Britain⁸, while Coors has increased its volume share of the lager category this year⁹ following a full refresh as part of a multi-million-pound investment.

"We'll be keeping close to new and emerging trends to help retailers make the most of all opportunities, while continuing to invest and innovate within our beer and cider heartlands."

Source

- ¹ Nielsen, 12 weeks 30.1.21 Total Coverage
- ² IRI Market Advantage, Total Grocery Outlets GB, Madri Excepcional Brand, Value Sales, 12 ww/e 21.05.22
- ³ IRI, All Outlets GB, Value share of mega category, 52 weeks to 23.04.22
- ⁴ Kantar Worldpanel, Alcovision, 12 m/e 31.03.21
- ⁵ IRI, All Outlets GB, Value share of category YoY, 52 weeks to 29.01.22
- ⁶ IRI, All Outlets GB, Volume share of subcategory, 52 weeks to 29.01.22
- ⁷ IRI and CGA GB data, Value sales, value share of category, 12 weeks to 26.03.22
- ⁸ IRI, Major Multis GB, Vol share of subcategory, 12 weeks to 23.04.22

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Pernod Ricard UK – Beefeater

Beefeater adds new flavour

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KEY BRANDS

Beefeater
Plymouth Gin
Malfy
Absolut
Jameson
Havana Club
Chivas
Campo Viejo
Jacob's Creek

Beefeater, the world's most awarded gin¹, is continuing to disrupt premium+ flavoured gin by launching a brand new flavour developed exclusively for the UK by master distiller Desmond Payne.

“Beefeater Rhubarb & Cranberry’s bright red colour is visually appealing and uses classic Beefeater botanicals, juniper and citrus, enhancing them with the slightly richer notes of rhubarb and a delightful burst of juicy cranberry,” he explains.

Beefeater, the No.1 premium flavoured gin in 25 countries worldwide², is continuing to drive category growth through innovation by unlocking new occasions and the new flavour combination was selected based on the top trending flavours in the UK. Beefeater Rhubarb & Cranberry can be enjoyed either as a classic gin & tonic or within a cocktail due to its versatility.

Distilling process

“This innovation is different to our original Beefeater Gin,” says Payne. “The process starts by distilling the Beefeater Dry Gin base and then adding natural rhubarb and cranberry flavours. While the product has a prominent fruit aroma, the base taste is discernibly that of juniper.

“Produced in our famous London copper stills, this is clearly part of the award-winning Beefeater family. The fruit influence is achieved using exclusively natural flavours – there is no compromise for excellence.”



Source

¹ Based on International Spirits Awards from 2004 to 2021
² IWSR 2021



“Beefeater Rhubarb & Cranberry is a bright, eye-catching colour that will appeal to the Instagram generation of gin drinkers”

Driving the category forward

Chris Shead, off-trade channel director for Pernod Ricard UK, comments: “Innovation is at the heart of Beefeater and the brand is perfectly placed to continue driving the category forward. Premium+ flavoured gin has experienced double-digit growth for nine consecutive years². Beefeater Blood Orange and Beefeater Pink Strawberry remain in the top eight flavoured gins in the UK in 2021 despite intensified competition since launch².

“Beefeater Rhubarb & Cranberry is a bright, eye-catching colour that will appeal to the Instagram generation of gin drinkers, while providing a fresh and natural taste of our classic botanicals. The flavoured gin category must continue to excite consumers by grabbing their attention with elevated flavour profiles.”

Beefeater Rhubarb & Cranberry, 37.5% abv, will be available from September 2022 in Asda and Waitrose, as well as selected on-trade venues. The brand, which comes in 70cl bottles, has an RRP of £19.49.

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*Nielsen, Total Coverage, MAT to 18.06.22

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Pernod Ricard – Wine

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KEY BRANDS

Campo Viejo
Stoneleigh
Castillo de Ibiza
Leaps & Bounds
Brancott Estate
Cafayate

 Hospitality at home has become increasingly popular as lockdowns have ignited consumers' passion to make their houses a haven.

To help shoppers prepare to be the perfect host, Pernod Ricard UK wine portfolio director Lucy Bearman shares the company's top tips to ensure there's something for every wine lover.

In-home socialising is a trigger to drive trade-up so it's crucial to stock the right range of premium wines to capitalise on this consumer behaviour, she says. "Although inflation and the increased prices of goods are squeezing consumers' wallets, the desire to treat themselves to accessible luxuries remains and this will drive premiumisation as wine will represent an affordable option for some."

The right range to drive trade-up

As the No.1 premium+ wine supplier¹, Pernod Ricard UK offers a portfolio of brands that cater to a wide variety of tastes, notes Bearman. "Campo Viejo is the UK's No.1 red wine brand² and the range offers clear trade-up opportunities for a variety of wallets at Christmas," she says.

As sauvignon blanc remains the leading grape varietal³, premium propositions like Stoneleigh, New Zealand's No.1 wine brand⁴, are driving value in the category, adds Bearman.

"Over the last year, the brand has achieved No.1 white wine NPD in grocery, and consumers have embraced its approach of being consciously



“Although inflation and the increased prices of goods are squeezing consumers' wallets, the desire to treat themselves to accessible luxuries remains”

grown, sustainably sourced and vegan-certified.

"A sustainable partnership with nature allows us to create our unique Sauvignon Blanc. Stoneleigh's new 'It's in our nature' campaign brings our sustainability commitments alive, as a growing national consciousness around sustainability sees 80% of UK consumers more concerned about their environmental impact⁵."

Distinctive wines with a difference

Shoppers looking for something different, such as a table talking point or gift for a family member need look no further than Castillo de Ibiza, the latest addition to Pernod Ricard UK's wine portfolio, notes Bearman. "Spanish rosé is in growth⁶ and, inspired by the culture and lifestyle of the Mediterranean and its magical sunsets, Castillo de Ibiza is a premium wine with high-quality packaging, making it the perfect gift."

Meanwhile, Leaps & Bounds, created based on the insight that 80% of UK wine drinkers love dogs⁷, is ideal for canine-loving relatives, and Cafayate Estate is an Argentinian wine ideal for Malbec trade-up.



Source

^{1,2} AC Nielsen, Total Off-Trade Value Share, MAT to 18.06.22
³ AC Nielsen, Total Off-Trade Value Share, MAT to 18.06.22
⁴ IRI NZ Grocery, No.1 wine in New Zealand by Value, MAT to 09.08.20
⁵ Gov.UK, BEIS Public Attitude Tracker March 2021, Advertising Association 2021
⁶ AC Nielsen, Total Off-Trade, Value Sales, MAT to 18.06.22
⁷ Toluna Quantitative Research, July 2021

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Puerto de Indias

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Marketing Officer

KEY BRANDS

Puerto de Indias
– **Strawberry Gin**
(already available on
Amazon, Ocado, Drinks
Direct and Booths)
– **Blackberry Gin**
(due to launch in the
UK in the autumn)

↙ Puerto de Indias is the pioneering brand that created the first-ever Strawberry Gin, inspiring a whole new flavoured spirits category, thanks to our recipe of real strawberries from our award-winning distillery in Seville, Spain, reveals global chief marketing officer Erwin Maldonado. “Faithful to our Sevillian roots, we dare to be different and invite consumers to experience the Spanish spirit,” he says.

“Winning Gold at the San Francisco World Spirits Competition in 2021, Puerto de Indias played a key role in igniting the pink gin craze and is the proud market leader in Spain¹.

“Available in more than 200 trade locations in the UK, and growing each day, our popular Strawberry Gin is a perfect way for large multiples, independent retailers, wholesalers, and suppliers alike to appeal to the flavoured gin trend. Recent research has revealed that strawberry is the UK consumers’ favourite gin flavour, with more than one in five (21.9%) saying they’d pick it over any other when shopping². Plus, strawberry-flavoured gin is especially popular with the younger demographic, with over half (54.5%) of 18- to 24-year-olds rating it as their favourite flavour³.

Made with real strawberries, Puerto de Indias also capitalises on consumers’ preference for non-artificial flavours, with the natural food flavours market projected to succeed at a CAGR of 5% during 2022-2029⁴.”

“Our research has also revealed that over half of UK tourists (50.8%) have visited Spain in the last five years, of which 31% say gin is their tippie of choice⁵,” reveals Maldonado. “What’s



“**Strawberry has been voted the UK’s favourite gin flavour, with 1 in 5 consumers saying they’d pick it over any other flavour when shopping²**”

most interesting is that when travelling abroad, 60% of UK tourists enjoy trying local gins, with three out of four (73.6%) searching for those brands at home upon returning from holiday⁶. As Spain’s favourite gin brand, Puerto de Indias offers UK retailers an authentic Spanish spirit that holidaymakers are desperate to find and enjoy in the UK.

“Also, the Big Night In occasion is a key opportunity for retailers and wholesalers to target consumers. As cost of living pressures intensify, consumers will increasingly look to drink from home to save money. At an RRP of £26.99, Puerto de Indias gin enables consumers to opt for more affordable gatherings and celebrations at home, without compromising on quality.”

This June, Puerto de Indias launched a new 365-day Pride bottle in support of LGBTQ+ communities. The launch marked Puerto de Indias’ first-ever ‘Unlimited Edition’ bottle as, although launched during Pride Month, the rainbow bottle is available year-round, to represent the brand’s commitment to fighting hate 365 days of the year.

The company will also be launching its Puerto de Indias Blackberry flavour to the UK market this autumn, just in time for warm, winter sipping as the colder months begin to arrive.



Source

¹ IWSR 2019
^{2,5} Puerto de Indias and 3Gem
UK Consumer Research

Puerto
DE Indias



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