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New normal arena

Suppliers discuss the sectors exciting consumers in the 'new normal' aftermath of lockdowns

Nineteen seemingly very long months on from where the Covid-19 pandemic started in the UK, there gradually appears to be some light at the end of the tunnel. Hospitality venues have opened up, people are once again getting together, albeit cautiously, and the promise of a celebratory Christmas on the horizon is giving some cheer to consumers who are, quite frankly, beyond bored with the whole situation.

Yet in the 'new normal' that UK shoppers now face, certain habits from the lockdown era will be retained. In the alcohol sector, at-home cocktail-making is set to continue, as people hone their skills to impress family and friends, for example. Meanwhile, the greater

focus on health and wellbeing will set the scene for the low- and no-alcohol category to flourish further. And the continued hunt for new flavours and unexpected twists amid an ongoing need for brand reassurance will all figure strongly.

So how do alcohol drinks suppliers view the recent evolution of the market?

Sales of beer, wine and spirits (BWS) have slowed in the grocery channel in recent weeks, due to the reopening of pubs, bars and hospitality, says Tom Smith, marketing director – Europe at Accolade Wines. However, he notes: "Compared to the peaks of lockdown, like-for-like BWS growth is still up 10% compared to 2019¹."

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As UK consumers gradually move into the post-Covid 'new normal', some key trends adopted during the past 20 months will linger, including at-home cocktail-making. However, they will also have an eye on improved health and wellbeing and will be on the hunt for exciting, unexpected and flavourful innovation, say suppliers.	
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Analysis

At Brothers Drinks Co, senior marketing manager Nicola Randall reports that the company's off-trade growth has continued this year, despite the easing of restrictions, with its August sales volumes to off-trade customers up 20%² versus last year. "Whereas previously, impulse purchases were high, with fewer shops taking place, we are now seeing the frequency of purchase increasing in the fruit cider segment. During lockdown and restrictions, consumers were purchasing bigger formats with greater regularity, but we're now seeing them moving back to smaller packs as they visit stores with greater frequency."

That said, she notes that at-home occasions have retained their popularity as consumer behaviour hasn't simply "snapped back to pre-pandemic norms". Consumers, she notes, have become adept at elevating social gatherings and exploring products and flavours in their own homes that they previously would only have done in the on-trade.

Aston Manor Cider marketing controller Calli O'Brien agrees that "now lockdown has ended, many consumers will be celebrating with family and friends in different ways", so the growth of cider sales through retail is continuing, despite the on-trade fully reopening. "Single-serve options, such as cider in cans and bottles, continue to play a role for those who are more aware of hygiene as they mix socially," she says, adding that can multipacks ensure consumers keep their supply stocked up with single-serve options.

In the spirits category, meanwhile, Pernod Ricard UK commercial director Ian Peart reports that total sales across the on- and off-trade were up 6.6%³ on last year for the period from 12 April to 19 June, as 'normal' socialising returned. "Sporting events such as the Euros also boosted total BWS sales compared to the fallow sporting summer of 2020, as did a rise in staycations. Consumers are exploring a wider range of products across an increased number of categories and off-trade spirits is fragmenting as shoppers continue to see new and exciting alternatives," he says.

In particular, ready-to-drinks (RTDs) are seeing increasing success. Red Star Brands managing director Clark McIlroy says there has been



steady uptake by consumers, with new products regularly entering the market and pushing the boundaries of the sector even wider. "According to data, the UK Flavoured Alcoholic Beverage (FAB) category grew by 23% in 2020 and is now worth £382m⁴," he says. Moreover, he reckons the category benefits from a "clear seasonal consumption occasion" with sales of spirit-based RTDs spiking at Christmas, according to recent data from Ireland⁵ as more student consumers seek easy-to-drink options with a good value price tag in the run-up to Christmas."

Hard seltzers, low and no

In 2020, the RTD category was the fastest-growing in alcohol globally⁶," confirms Molson Coors' off-trade sales director Kevin Fawell. He highlights that the hot ticket in this area of the market is the hard seltzer sector where, following on from the trend in the US, sales have increased in value "more

than eightfold in the space of 12 months in the UK⁷". The company cemented its faith in the sector early via an exclusive distribution partnership with premium hard seltzer brand Botany Bay and expanded this with its own brand Three Fold. "We recently announced a £25m investment in our Burton brewery, which includes a new canning line specifically dedicated to hard seltzers," he reveals.

Over the next five years, hard seltzers are likely to see the highest growth rate within the UK's RTD category⁸," says Accolade Wines' Smith. Last year, the company unveiled Echo Falls Rosé Seltzers and, in August this year, introduced its dedicated seltzer line, Nine Yards, aimed at "the increasing group of adventurous and environmentally conscious shoppers", he adds.

Red Star Brands' McIlroy makes the point that category innovation is important for retailers as RTDs, mixed



Influencers at heart of brand campaigns

Targeted social media activation, paid partnerships with influencers, influencer-led events and consumer experiences have all been important in increasing the awareness for vodka-based RTD Four Loko, says Red Star Brands managing director Clark McIlroy. “Direct-to-consumer marketing will play a big role in growing the brand as Four Loko launches its own e-commerce website for its fan base.”

The brand, named by Morning Consult as “one of the fastest-growing brands among the GenZ population¹⁸”, is introducing a

nationwide student brand ambassador campaign across the UK and Ireland in time for the Freshers period. Running from mid-September to the end of November across seven cities, it will appoint 35 student brand ambassadors to help Four Loko raise awareness and trial through peer-to-peer sampling at parties, and special events.

Brothers Drinks Co senior marketing manager Nicola Randall says it has a “strong and highly engaged” following across its social channels, which were highly relevant prior to the pandemic, but have been crucial in maintaining relevance

and engagement with its audience in the past 18-20 months. “Engaging with social media influencers also forms a key part of that strategy along with our ‘Find Your Flavour’ campaign.”

SkinnyBrands classes all of its fans on social media as influencers and say they have helped the brand gain genuine social proof through positive reviews.

Molson Coors is using “three well-known social media influencers” as part of its investment in hard seltzer brand Three Fold. “We put our talented social media influencers right at the heart of the campaign, spotlighting them in

our TV advertising to embody the spirit of the campaign’s theme ‘Flow Your Own Way’,” says off-trade sales director Kevin Fawell.

Meanwhile, Accolade Wines focuses on different social media channels depending on the brand, says marketing director – Europe Tom Smith. “For example, if we wanted to target Gen Z for Echo Falls Rosé Seltzers, we’d utilise Instagram or Tik Tok, where this audience spends the majority of their digital time,” he says. “Influencer campaigns act like a form of digital ‘word of mouth’ marketing, with a pool of brand ambassadors at your disposal.”

cocktails and hard seltzers drive experimental and impulse buying decisions. However, he notes: “As trends shift, consumers may not snap up the low-calorie hard seltzers long-term, with insights suggesting Brits prefer a fuller flavour and sweeter taste, so we can expect more innovation within the RTD category as brands strive to be relevant.” He points out that, in the US, there are much more relaxed rules around sugar, so the hard seltzer drinks in the UK, which are marketed as low-calorie options, have a reduced flavour profile compared to other RTD products. Given the fact that British consumers prefer a fuller flavour and sweeter taste, he says, the company’s brand Four Loko is “doing very well with retailers since its launch earlier this year”.

Accolade Wines’ Smith predicts that sales of low-/no-alcohol products are projected to rise 31% by 2024⁹. Alongside “a boom in the trend for

seltzers”, there has been “big growth in awareness of low and no offerings¹⁰”, he says. “These have been particularly successful in the impulse channel, indicating that health, moderation and sustainability (with reduced chance of waste from small formats) remain a priority for consumers.”

Randall at Brothers Drinks Co points to the fact that low & no products are popular with a young audience. “Consumers are undoubtedly looking for more choice as part of a balanced lifestyle and the burgeoning [low & no] segment is a key part of this trend, with 71% of under 35-year-olds now adopting low- & no-alcohol variants and 88% of total consumers now aware of non-alcoholic versions of traditional alcoholic drinks¹¹,” she says. In May this year, company launched Toffee Apple Alcohol Free cider to the market and says it will become increasingly important for retailers to have a dedicated range of low & no on their

shelves, but that there is still “a lot to do to educate consumers through merchandising and space allocation”.

“According to recent research, 27% of 18- to 35-year-olds say they are actively cutting down on alcohol consumption¹² and 56% of the same age range are now consuming more low or no-alcohol products,” reveals Aston Manor Cider’s O’Brien. “This reflects the global trend where 45% of consumers says they are interested in sophisticated soft drinks as alternatives to alcohol¹³.” The company launched its own low-alcohol (0.5%) version of its vintage cider Friels, made using 100% British apples and available in 4 x440ml cans.

Meanwhile Molson Coors’ eye on market trends has also extended to the burgeoning low & no category, with the launch of Doom Bar Zero, offering drinkers an alcohol-free option in ale. “The brewing team at Sharp’s worked on the recipe for more than two years,

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developing a pioneering brewing method to ensure Doom Bar Zero retains a similar flavour profile and stays true to the style of the Doom Bar brand, while achieving 0.0% alcohol – significantly more difficult to brew than 0.5%,” says Fawell.

Calorie labelling

One of the latest challenges to be faced by the alcoholic drinks sector is the government’s proposal to list “hidden calories” on alcoholic drinks.

At the end of July it announced plans to launch a consultation on calorie labelling on alcohol before the end of year, citing that as part of its new obesity strategy there was a need to be clear about the liquid calories in alcohol affected health. It said the majority of the public (80%) was unaware of the calorie content of common drinks, with many typically underestimating it.

Alcoholic drinks suppliers are pretty sanguine about the move, clearly understanding that the market was already headed in that direction.

Pernod Ricard UK commercial director Ian Peart says: “Responsible consumption of alcohol has been on a positive trend for over a decade and we have already made a number of industry labelling commitments to provide greater nutritional information to consumers. For instance, 80% of our volumes now include calories on label, and our brand websites include the full range of nutritional information.” As a responsible producer, the company supports the government’s plans to introduce calorie labelling on-pack, he adds.

“We believe in offering a choice for consumers, so that they can pick the drink that is right for them, which flexes depending on the occasion,” notes Accolade Wines’ marketing director – Europe Tom Smith. “For example our new Echo Falls Rosé Seltzers cans (230ml) contain 69kcal and are aimed at those looking for a lighter alternative to traditional drinks.”

Skinny Brands, which provides low-calorie lager, is understandably “delighted” that this will be a fixture of label standards moving forward for BWS, “thus enabling consumers to make better informed choices around alcohol”, says CEO Adrian Hirst.



Flavour trends

“If it’s not flavoured, it’s not in favour,” reckons Pernod Ricard UK’s Peart. “The categories gaining the most share are either heavily linked to cocktails or are flavoured,” he says, pointing to the its latest Scotch whisky launch, The Glenlivet Caribbean Reserve, a single malt selectively finished in rum barrels.

Indeed, flavour seems to have been very much on the agenda at the company, with a number of NPD launched since spring this year,

including Absolut Watermelon, Malibu Watermelon, Beefeater Peach & Raspberry, Havana Club Cuban Spiced (the brand’s first spiced variant introduced exclusively to the UK) and the recently released Jameson Orange (Irish whiskey infused with natural orange flavouring).

At Molson Coors, fruit flavours – red berries, tropical and citrus – are the offering in its Three Fold brand, while flavoured cider has also continued to evolve, with a recent shift in consumer



preference towards more refreshing options, says Fawell. The company introduced Rekorderlig Pink Lemon to meet this demand, but also offers Rekorderlig Spiced Plum, which he feels will be popular in the winter months.

“Fruit ciders and innovation seen in this segment are still highly relevant,” says Randall from Brothers Drinks Co. Forty-two percent of cider drinkers express an interest in more unique flavours and this rises to 49% among women and 48% among 25- to 54-year-

olds¹⁴. Retailers should consider how their ranges can cater to this trend.”

Given this, the company has continued to focus its innovation on new flavour development, recently adding Pink Grapefruit and Honeycomb to its ranges.

Aston Manor Cider, meanwhile, has taken cues from traditional British fruit favourites in the juice and squash market to introduce Crumpton Oaks Cherry & Berry Cider, as well as a Dark Fruit variant. “The cider market over-indexes with older consumers, but we know from our data insights that Crumpton Oaks is increasingly attracting a younger consumer,” says O’Brien. “Twenty-eight- to 34-year-olds account for the biggest share in total fruit cider growth¹⁵, which represents a huge opportunity for retailers.”

The company also introduced a cocktail-inspired flavoured cider under the Friels brand. The Piña Colada and Passionfruit Punch flavours come in 250ml RTD cans.

Market drivers

With Mintel suggesting that wellbeing, value and identity are three key drivers in the food and drinks market at present¹⁶, suppliers point to a variety of market trends that will colour the industry in the next few months.

“Research for SkinnyBrands has proven that lower-calorie, vegan and free-from options are no longer seen as trends but a way of life, where the appetite for these alternatives is growing in demand, especially in the run-up to Christmas,” says CEO Adrian Hirst. “Now the on-trade has opened, we have seen a positive uptake in reduced calorie and carb, gluten-free and vegan BWS options being requested to complement food-led occasions.” In 2022, the company will be announcing another “innovative beer brand – in harmony with Skinny Lager – in the beer category, he reveals.

At Brothers Drinks Co, Randall says: “Consumers are absolutely looking for brands they can identify with and relate to. The notion that consumption of a product can be purely transactional is simply not the case. A significant 75% of cider drinkers agree that supporting British cider brands is important and 7% of cider drinkers agree it is important to know about a cider brand’s heritage¹⁷.”

Covid-19 has accelerated the focus on health, agrees Accolade Wines’ Smith. “While these trends are heavily driven by Millennials and Gen Z, we’re starting to see a wider preference for moderation and sustainability across the demographics. “The importance of value will be prominent in the year, following the economic pressures brought about through Covid restrictions,” he adds. “It will be key that suppliers and retailers offer a balance between affordable drink options as well as trade-up offers in ranging for those looking to treat themselves.”

Celebrating and treating are definitely two areas of focus that see greater emphasis on Christmas Day this year, acknowledges Smith, saying it’s important to remember tiering and pushing big brands alongside premium options. Bag-in-box and wine on tap options offer great solutions for consumers who are hosting friends and want to make it easier to purchase larger volumes, he suggests. “There are much more branded and better-quality options in [these segments of] the category now that retailers should look to raise awareness of,” he adds.

The trends of at-home cocktail exploration and premiumisation are likely to continue into the winter months, suppliers agree. “This is where we are likely to see more winter warmer style drinks such as mulled cider come into play,” says Brothers’ Randall.

“It is worth bearing in mind the occasions that consumers may have missed out on celebrating last year, from Halloween to New Year, which they will want to make special. After what was a very different festive season for many last year, we expect consumers to really push the boat out and create occasions at home.”

Sources

- ¹ Kantar, Grocery Performance, 11.07.21
- ² Brothers Drinks Ltd data, August 2021
- ³ Nielsen, Total off-trade to 19.06.21/CGA OPM, Total on-trade to 19.06.21
- ⁴ IRI, Total Market Data, 52 w/e 29.11.20
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- ⁶ The IWSR analysis, December 2020
- ⁷ IRI, Value Sales, Total Outlets, MAT to 19.06.21
- ⁸ The IWSR, Hard Seltzer Report, July 2020
- ⁹ The IWSR’s No- and Low-Alcohol Strategic Study, 2021
- ¹⁰ KAM Low & No Alcohol Survey, December 2020, 500 UK adults +18, drinkers and non-drinkers
- ¹¹ KAM Media, Low & No Report 2021
- ¹² IRI, 26.01.20; Walnut Unlimited, April 2019
- ¹³ Dohler, Market & Consumer Insights, March 2021 (GNPD-Mintel/Press/Global Data/Trendhunter)
- ¹⁴ Lightspeed/Mintel, 2020
- ¹⁵ Kantar, Online data to 27.12.20
- ¹⁶ <https://downloads.mintel.com/private/jcZU4/files/852695/private/jcZU4/files/852695/>
- ¹⁷ Lightspeed/Mintel 2020
- ¹⁸ Morning Consult, Fastest Growing Brands of 2020

Accolade Wines Europe

Innovating for wine growth

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Echo Falls
Jam Shed
Mud House
Kumala
Banrock Station
Lambrini

INNOVATION BRANDS

Nine Yards

While the alcohol sector in the on-trade had an unpredictable year, lockdown saw a rise in at-home drinking occasions and supported wine sales growth within retail.

Throughout the last 18 months, brands have been key to attracting people to the category, offering familiarity and trust, says Accolade Wines, which offers a variety of signpost brands for retailers, including the UK's biggest selling wine¹, Hardys.

Tom Smith, marketing director – Europe at Accolade Wines, says: “From a retail perspective, it has been business as usual, and we’ve had a phenomenal year. Throughout the various lockdowns we saw many drinking occasions shift back into our homes, and this affected our shopping habits too. Online shopping soared in popularity, and this is set to continue.

“Looking ahead, there will also be more focus on moderation, so we expect the importance of no-/low-alcohol products to increase, with sales forecast to rise 31% by 2024², and we have exciting plans in this space.

“We’ve continued to innovate and branch out into new categories this year, maintaining our position as one of the leading global drinks manufacturers. This summer, Echo Falls unveiled a brand-new look for its entire Fruit Fusions 5.5% and 9.0% portfolio, tapping into the growing demand around moderation. We also grew our UK portfolio with the acquisition of Lambrini, the nation’s number one brand of perry³.

“We review our brand portfolios constantly to ensure a strong offer that meets consumers’ demands, including new categories or formats, such as bag-in-a-box and single-serve cans. In August, we introduced our dedicated seltzer line, Nine Yards, aimed at the increasing group of adventurous and environmentally conscious shoppers.

“Now worth £45m and reporting huge growth year-on-year, the innovative Jam Shed has been a runaway success since its first Shiraz SKU launched in 2017. After a year of exciting NPD, the brand now includes four wines in its expanding portfolio: Shiraz, Malbec,



“We expect the importance of no-/low-alcohol products to increase, with sales forecast to rise by 31% by 2024², and we have exciting plans in this space”

Chardonnay, plus its first-ever Rosé launched in May, which taps into this burgeoning category.

“Sustainability is a key focus for us and, last year, our core branded portfolio⁴ – including Hardys, Mud House, Jam Shed, Banrock Station, Echo Falls and Kumala – was certified carbon-neutral. Shoppers are demanding greener products, with 62% of consumers saying they want to buy from sustainable brands* – and the wine category is no different.

“Effective merchandising is key for wine. The category must be clear and easy to navigate – stocking key brands and origins at a variety of price points. We’re investing to ensure shoppers are reached at various touchpoints on their journey, whether that’s at home, on the move and in-store, to make wines more accessible and exciting to shoppers.”

Source

¹ NielsenIQ, MAT to 15.04.21

² IWSR’s No-and Low-Alcohol Strategic Study 2021

³ Nielsen, 2021

⁴ Hardys (Australia) Banrock Station (Australia), Echo Falls (USA), Kumala (South Africa), Mud House (New Zealand), Anakena (Chile), Echo Falls (USA, Chile, Italy, Spain), Echo Falls Fruit Fusions (blended wine with additional ingredients, South Africa, Spain), Echo Falls Blends (blended wine, South Africa & USA) Jack Rabbit (Chile), Stowells (Chile, Italy), Jack Rabbit (Italy), Da Luca (Italy), Jam Shed (emissions estimated, Australia), Ginger Joe (ginger beer, UK)

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Accolade
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*The Grocer Top 100 Biggest Alcohol Brands, NielsenIQ, MAT to 15 April 2021

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Aston Manor Cider

Convenience and choice

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KEY BRANDS

Crumpton Oaks Cider Co
Friels
Malvern Cider Co
Chardolini

➔ The last year has seen convenience and appreciating choice increase in importance among consumers, and this particularly applies to cider, according to Calli O'Brien, marketing controller at Aston Manor Cider.

"Restrictions meant behaviours were altered and, subsequently, consumers have placed greater value on the convenience of shopping locally," she says. "They have also appreciated choice across cider as they have chosen to try something new at home, enhance their at-home drink experience or look to reduce their alcohol consumption, so that has meant them considering the range of value, premium, fruit and low-/no-alcohol cider options."

While sustainability remains a priority for many consumers – with 49% considering recyclable/reusable packaging to be important¹ – single-serve ciders in cans and bottles also play a role for those who are more aware of hygiene as they mix socially, a factor likely to increase in the run-up to Christmas, she notes. "Can multi-packs, such as Crumpton Oaks Cider 10-pack, prove popular year-after-year, but also enable consumers to stock up with hygienic single-serve options," she says.

"Stores should provide varied options across bottles and cans, as well as ensuring cider is ready and chilled in fridges to attract impulse purchases."

Matching convenience with choice

Aston Manor Cider produces a range of premium ciders, with Malvern Gold and Friels operating in that part of the category. "Malvern Gold – awarded 'The World's Best Still Cider'² – is listed regionally within Co-op Food stores and nationally in 157 Sainsbury's stores, which has made it more accessible to premium cider drinkers," notes O'Brien. "We also launched Friels 5.5% in 4 x 440ml cans in 2020 after consumers told us they loved the 7.4% Vintage. Friels is made from 100% British apples, and appeals to younger, more affluent shoppers, who choose the premium 5.5% Signature Blend as a trade-up from standard brands.

"Crumpton Oaks offers great value



“Restrictions have meant behaviours were altered and consumers placed greater value on the convenience of shopping locally”



to those looking for choice. Recently launched, the Crumpton Oaks Cherry & Berry range – available in a 4 x 440ml carded can multi-pack and 2L PET bottle, as well as a Dark Fruit variant in a larger pack format (2L PET), broadens the brand's consumer base and can attract new shoppers to the category."

Consumers' choice expectations also extend to low-/no-alcohol ciders, she adds. "Our low-alcohol version (0.5%) of Friels is made using 100% British apples, no artificials and 100% recyclable packaging.

"Many consumers also perceive perry as a lower-ABV alternative to wine and are choosing our 'new look' Chardolini to enjoy as a relaxing drink with friends, while the 250ml can provides a great, sessionable option.

"By focusing on convenience and choice, retailers can grow sales in the cider category, so we'd encourage them to contact Aston Manor Cider to see how our brands can help."

Source

¹ Döhler, Market & Consumer Insights, March 2021 (Global data/consumers in 11 countries worldwide)

² World Cider Awards

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British Honey Company

Agility and innovation

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Keepr's Honey Spirits
Two Birds Spirits
Dodd's Organic Gin
1606
English Heritage
Tusmore Whiskey

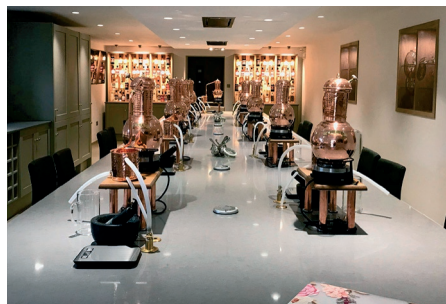
 British Honey Company is primarily known for its premium range of Keepr's honey spirits, linked to its roots as beekeepers with a strong, traceable hive-to-bottle story that has preserving the British honeybee at its heart, says the company.

But those roots, since its debut on the craft spirits scene, have grown hugely to include the exceptional Soil Association-certified Dodd's Organic Gins, the creative flavours of Two Birds Spirits, a collection of English Heritage gins inspired by its gardens and landscapes, and an affordable luxury range, 1606, sold in the UK and exported to markets such as the USA and China.

"Unlike many other craft spirits companies, we own our distilleries, totalling six stills and a whiskey still, so we have the infrastructure to support our growth and keep a watchful eye over spirit quality," says CEO Michael Williams. "Alongside our brands, we produce around 300 white label craft spirits, some of them award-winning, for small to large players in the market. We remove many of the challenges of managing these white label lines, supporting diversity in an industry where consumers are continually looking for exciting and new offerings."

British Honey Company has moved adeptly, understanding trends and applying products to its range quickly as tastes and needs change, he adds. These range from its Keepr's no- and low-alcohol products to upcoming exciting new flavoured rums and ready-to-drink cocktails, tapping into category growth.

"The pandemic caused many shifts in the industry, but it didn't curb our ambition," explains Williams. "We forged ahead, creating a whiskey distillery at the Tusmore Estate in



“The pandemic caused many shifts in the industry, but it didn't curb our ambition. We forged ahead, creating a whiskey distillery at the Tusmore Estate in Oxfordshire”

Oxfordshire, which will open in 2022. We use the honey from our 250 beehives there in our Keepr's spirits, and, alongside the distillery, there'll be a gin school. Buyers can come and live our story for themselves by visiting our hives and seeing how the estate's barley and rye are used to make our Tusmore Whiskies, laid down in 2019.

"Creating experiences and niche products for our customers has a direct effect on loyalty," he notes. "Consumers are enticed by our flavours, sizes and multipack gift options. We're installing a new 5cl bottling line to produce 10,000 miniatures per hour, giving us the capacity and flexibility to offer tasting variety packs of our core spirits."

Williams concludes: "Our agility in innovation positions us as one of the most exciting craft spirits companies in the market. We've just released an English Heritage Organic Dry Gin, and have inspired NPD from our Two Birds Spirits collection coming soon that will really stand out on the shelves."

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 Senior marketing manager

KEY BRANDS

Brothers

As Covid-19 restrictions have eased, the challenges and opportunities faced by Brothers and the off-trade as a whole, are beginning to change, says Nicola Randall, senior marketing manager at Brothers Drinks Co. “We’re extremely excited to be able to meet with consumers in third-space locations again and capitalise on trends that have emerged over the past 18 months as we move into the remainder of 2021,” she says.

Events are back with a bang

“Our brand has deep roots in engaging with consumers at events and festivals; in fact, Brothers Cider was born in Glastonbury back in 1995, which then saw the brand grow its presence across the circuit before reaching grocery retail and the on-trade,” notes Randall. “Festivals are a key part of our DNA and we’ve missed them hugely since the start of 2020. This year we’ll be at over 50 festivals and events, reaching over 3m consumers throughout the summer, autumn and winter – a fantastic way to continue growing our brand.”

‘Tis the season to celebrate

Halloween, the second-biggest drinking occasion behind New Year’s Eve¹, is a key calendar moment, marking the beginning of winter festivities, she says. “As nights start to close in, there will be plenty of opportunity to support consumers in continuing to create experiences at home. Brothers’ Toffee Apple Cider, a consumer favourite at Halloween is perfectly placed to capitalise on consumers’ desire for something different. A delicious blend of cream soda and smouldering toffee with a rich creamy finish, it’s a flavour



“This year we’ll be at over 50 festivals and events, reaching over 3m consumers throughout the summer, autumn and winter – a fantastic way to continue growing our brand”

that will ‘flood the senses’ with its unmistakable sticky and sweet flavour.”

One of the most prominent trends in cider of late has been the introduction of low and no variants, with 43% of consumers now aware of alcohol-free cider compared to 32% in 2020². “Consumers increasingly seek options to complement a more balanced lifestyle and this will have continued importance, even during the festive season,” adds Randall. “At Brothers our new Toffee Apple Alcohol Free provides the same distinctive taste without the alcohol, empowering consumers to choose quality and exciting drinks whatever the occasion.”

Perfect winter warmers

Although cider sales are known to peak during the summer, there are plenty of ways to bring the category to the fore in the colder months, she adds. “Creating cocktails and punches at home is increasingly popular, so mulled ciders should also be on the radar for the winter season. Our Spiced Toffee Apple Winter Warmer is an absolute hit at winter markets and festivals and is a great twist on a classic. We recommend retailers stock the required ingredients for these serves close together, with prompts in-store to drive sales and create engagement in their ranges.”

Source

¹ Mintel Research, 2017
² KAM Media, Low and No Report 2021

SCARPLY CIOUS REFRESHING



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A CURIOUS MIX

Molson Coors Beverage Company

Beer, cider... and beyond

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KEY BRANDS

Carling
Cobra
Coors
Blue Moon
Sharp's Doom Bar
Sharp's Atlantic Pale Ale
Staropramen
Aspall Cyder
Rekorderlig Cider
Three Fold

DISTRIBUTES

Bodega Bay
Jimmy's Iced Coffee
Lixir Drinks
Tarquin's Gin
Twin Fin Rum

What people want to drink at home has evolved considerably over the past 18 months, says Kevin Fawell, off-trade sales director at Molson Coors Beverage Company. "Efforts to keep things interesting during lockdown have encouraged them to expand their horizons, with more than half of UK adults saying they want to try new alcoholic drinks during nights in¹. Even as some semblance of normality returns, we shouldn't expect this experimentation to simply fade away. For us, that means looking beyond just beer and cider and delivering to our off-trade customers the variety of drinks for every occasion they need to offer.

"This doesn't mean a shift away from trusted core brands is required, as core lager still accounts for 23% of total off-trade lager sales² and brands like Carling, the No.1 lager in Great Britain, and Coors, the most popular 4% beer among 18- to 34-year-olds³, are still the backbone of a good offering, but we must acknowledge the desire among consumers for more variety."

Innovation will be key and ready-to-drinks (RTDs) is arguably where Fawell says he sees this most abundantly.

"Hard seltzers are the most prominent current example of consumer demand for something new – the category in the UK achieved an eightfold increase in sales in the 12 months to June 2021⁴.

"Hard seltzers took off in the US – with retail sales reaching \$2.7bn in the 12 months to June last year⁵ – so we decided to invest in the UK market early and agreed an exclusive distribution partnership with premium hard seltzer brand Bodega Bay, before launching our own brand, Three Fold, early in 2021."

Alongside a £5m multi-channel media campaign – its biggest-ever



“Efforts to keep things interesting during lockdown have encouraged consumers to expand their horizons, with more than half of UK adults saying they want to try new alcoholic drinks during nights in”

brand investment in a new category – Molson Coors also recently announced a £25m upgrade of its Burton brewery, including a new canning line for the slimmer cans used for Three Fold.

"Three Fold takes recognisable flavours – red berries, tropical and citrus – and combines them with the lighter fresher taste profile of hard seltzer. It is naturally vegan, gluten-free, and contains 93 calories per 330ml can.

"The need for a broader offering is also the thinking behind launching our Beverage Hub – a dedicated team at Molson Coors, focused on expanding its footprint beyond the beer and cider aisle – earlier this year," he explains. "Since launch, the team has secured distribution deals with Jimmy's Iced Coffee, mixer brand Lixir Drinks and Southwestern Distillery for Tarquin's Gin and Twin Fin Rum. We're building a balanced portfolio of adult beverages to meet a range of consumer tastes and occasions for our customers."



Source

¹ Kantar Worldpanel, Alcovision, 12 m/e 31.03.21

² IRI, All outlets, GB Value Sales, 52 w/e 19.06.21

³ Kantar, Total GB, 52 w/e 12.07.20

⁴ IRI, Total Outlets, Value Sales, MAT to 19.06.21

⁵ Nielsen, Total US off-premise, 52 w/e 13.06.20

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Source: *Savanta BrandVue,
12 months ending December 2020.

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Pernod Ricard UK

Keeping ahead of the trends

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

➔ Pernod Ricard UK is continuing to invest in virtual experiences and gifting as the Covid-19 pandemic accelerates existing consumer trends, such as at-home cocktail making and premiumisation. With frequent on-trade restrictions over the last 18 months, spirits exploration has been driven by shoppers seeking new and exciting products, so Pernod Ricard UK is focusing on these core opportunities for growth.

At-home cocktails

The spirits categories gaining the most share are either heavily linked to cocktails or are flavoured. “As the UK embraced at-home cocktail-making, Malibu Coconut, heart of the summer classic Piña Colada, saw more than double the market growth, Kahlúa, star of the Espresso Martini, grew by 47%, and Absolut Vanilia, champion of the UK’s favourite Passionfruit Martini, achieved a 66% value growth¹,” reveals commercial director Ian Peart.

Over two-thirds of at-home cocktail-makers claim they will continue to make cocktails after lockdown², so the company will build on the success of its virtual experiences last year to offer 75 online masterclasses throughout November and December.

Premiumisation

With a new level of appreciation for the skill required to make a good serve, the premiumisation now seen both in- and out-of-home will continue as, during times of financial uncertainty, consumers turn to trusted brands and treat themselves to accessible luxuries such as premium drinks.



“Breadth of range has never been more important and retailers must cater for a wide variety of occasions and tastes with premium options that will make for generous and special party contributions”

Forty-two percent of consumers will look to bring alcohol as a gift to an occasion³ and, as a key driver of trade-up, hosts place value on serving something ‘a bit more special’ to their guests. “Breadth of range has therefore never been more important, and retailers must cater for a wide variety of occasions and tastes with premium options that will make for generous and special party contributions,” says Peart.

“Pernod Ricard UK has helped to drive added value for the spirits category, achieving double-digit value growth (+23.6%) in the off-trade⁴, and has also driven premiumisation in the wine sector, with super-premium Jacob’s Creek Double Barrel notching up 100% growth⁵, for example.

Innovation

“Flavoured spirits have driven 80% of all off-trade spirits NPD sales in the last two years⁶, and Pernod Ricard UK is well-placed to capitalise on this trend, with innovations such as Absolut Watermelon, Malibu Watermelon, Beefeater Peach & Raspberry, Havana Club Cuban Spiced and Jameson Orange, all recently released,” he adds.

“Continued momentum in wine has seen the company release several new product developments since spring, such as Campo Viejo Winemakers’ Blend, the relaunched Jacob’s Creek Reserves, and New Zealand’s No.1 Sauvignon Blanc⁷, Stoneleigh.”



Source

¹ All Nielsen, brand level, value % change, MAT vs. YA

² Toluna cocktails at-home survey, March 2021

³ The Source, Christmas Research 2019, 1970 participants

⁴ Nielsen, MAT to 19.06.21

⁵ NielsenIQ, MAT to 19.06.21

⁶ Nielsen Homescan, NPD value, % share of total NPD, where NPD = sales L2Y vs. number of sales 3YA, data to 27.03.21

⁷ IRI, NZ Grocery, MAT to 09.08.20

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*Nielsen, Total Coverage, Value Sales, MAT to 19.06.21

**Nielsen, Total Impulse, MAT to 19.06.21

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Red Star Brands

Four Loko set to shake up UK

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Managing Director

KEY BRANDS

Four Loko
Master of Mixes
Sparkling Ice

➔ The ready-to-drink (RTD) category globally is booming, with format and flavour innovation driving consumption occasions and recruiting consumers from all ages.

In fact, according to the IWSR, it was the only alcohol drinks category that was in volume growth in 2020, up 43% globally¹. Insights suggest the growth is expected to continue, with RTDs outperforming the rest of the alcohol market for at least the next five years.

As a heavyweight RTD in the US and ranked the No.1 RTD brand for the past 10 years², Four Loko launched into the UK in spring with Red Star Brands. The latter's managing director Clark McIlroy believes there's huge untapped potential, as the UK RTD market catches up with the US, and it is an exciting time ahead for the category.

Launching with four options – Blue, Fruit Punch flavour, Gold and Sour Apple flavour, at 8.5% ABV in 440ml cans – the US brand is now available to purchase through UK wholesale and convenience groups. “Catering to British consumers’ demand for full flavour and sweeter taste, initial sales data suggests shopper trial and repeat purchase rates are surpassing other well-known brands, with some consumers having purchased more than five times since launch³,” reveals McIlroy.

To target its key cohort of consumers in the US, the brand has conducted successful marketing drives to create ‘Epic Stories’ for millennials and Gen Z students, resulting in a strong USP and brand awareness. According to McIlroy, Red Star Brands will support Four Loko in the UK and Ireland by driving awareness with a social and digital marketing campaign and a student ambassador scheme which will be rolled out across the UK and Ireland for the Freshers period.

Activated across seven UK cities and running from mid-September to end of December, the campaign will appoint 35 student brand ambassadors who will raise awareness and drive trial of Four Loko through peer-to-peer sampling at parties, hosting of special events in each city, as well as supporting



“Initial data suggests shopper trial and repeat purchase rates are surpassing other well-known brands with some consumers having purchased more than five times since launch”

a pathway to purchase and create a wealth of exciting user-generated content for social channels.

The campaign will drive awareness within a key trading period when students head to university, socialising is unrestricted and key calendar dates like Halloween and Christmas bring people together, with data suggesting sales of spirit-based RTDs spike at Christmas, demonstrating a clear seasonal consumption occasion³.

“Particularly at this crucial time of year, the RTD sector is competitive and disruptive point-of-sale is so important,” says McIlroy. “By using FSDUs, glorifiers, counter display units and digital support, retailers who stock Four Loko can encourage the experimental and impulse buying that students are well-known for.

“With nightclubs reopened in time for students’ return to university, Four Loko is enjoyed as a ‘pre’ drink for consumers looking to extend the occasion with early evening consumption at home,” he adds. “Sales data shows a quarter of shopping baskets featuring other alcoholic beverages, also included over two cans of Four Loko, reflecting the ‘pre’ drink concept³.

“To maximise sales and marketing opportunities, it’s important the category is signposted on shelf and stocked in the chiller for immediate consumption, but also positioned near other alcohol products.”

With Four Loko set to shake up the category, he says, retailers are being urged to stock up in time for the key trading periods ahead.



Source

¹ London Spirits Competition, June 2021, <https://tinyurl.com/zn5nmkab>

² IRI, Total US, Conv 1 CT 24oz FMB Brand Family, 2015-2020, YTD ending 23.08.20

³ Richmond Brand Revolutionaries, RTD report for Ireland, August 2021

four

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* IRI Total US Conv 1 CT 24OZ FMB Brand Family – 2015 – 2020 YTD Ending 8/23/20

SkinnyBrands

Skinny Lager's high agenda

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KEY BRANDS

SkinnyBrands Premium Lager
– 12-pack (330ml bottles)
– 4-pack (330ml bottles)
– 24-pack (330ml cans)

↙ SkinnyBrands Premium Lager – a premium lager, 4% ABV at only 89 calories per bottle, while also being gluten-free and vegan-certified – is up 65% in revenue growth for 2021 (YoY)¹. The brand is distributed nationwide in Tesco (Free from), Morrisons, Asda and online with Amazon and Ocado.

“During the initial UK lockdown consumers were drinking more frequently, purchasing beer online and wanting to watch their calories,” says the company. “Skinny Lager championed this trend and, as a result, became the ‘Most reviewed lower calorie lager’ on Amazon UK for their 12-pack 330ml bottles (4.6-star rating)².

“The brand has worked relentlessly on growing and retaining a loyal fan base of Skinny Lager adorers post-lockdown to keep driving sales across the multiples,” it notes. “In a crowded and competitive sector standing out on shelf is key to SkinnyBrands reaching new-to-brand consumers. We credit this to our packaging, which tells an educational story that helps the brand stand out at point of purchase, complemented by out-of-category aisle spaces. Our digital campaigns with the multiples ensure SkinnyBrands stands out on their .com sites. This omni-channel approach has meant their shoppers can purchase the brand at every touchpoint.”

Adrian Hirst, CEO at SkinnyBrands, adds: “Merchandising a brand that ticks an abundance of USPs within beer, wine & spirits (BWS) is a continual pursuit. We work closely with our key customers to shape our brand and category development. We continue to champion our awareness and education within the multiples. By adding our 330ml cans – a launch inspired by demand from Skinny Lager



“The brand has worked relentlessly on growing and retaining a loyal fan base of Skinny Lager adorers post-lockdown to keep driving sales across the multiples”

fans – we can keep Skinny Lager on a high agenda as the brand evolves year on year within BWS.”

‘Skinny Lager’ as it is known to the brand’s social media-driven fan base is overwhelmed with the response in the on-premise sector, too, as its draught version gains listings in nationwide wholesalers and foodservice.

Brand exports are also rising. It is already available in Africa, Asia, Europe and the Middle East and will launch in the US and Canada this year, along with the Balearics and Spain in 2022.

With worldwide distribution growing, SkinnyBrands is now working towards an above-the-line TV and media campaign to raise its awareness in the mainstream. This will be unveiled in the new year. “As a small and mighty team, we are beyond proud of the milestones we have hit within BWS,” says marketing manager Lucy Chan Chappells. “We want our brand to become a household name and easily accessible to drinkers who are yet to discover us. We receive hundreds of messages from fans who can now enjoy a lager after thinking they’d have to give it up forever due to dietary restrictions.”

The Grocer can exclusively reveal that, in 2022, SkinnyBrands will unveil another innovative beer brand – in harmony with Skinny Lager.



Source

¹ Skinny Brands Ltd, EPOS data, YoY growth

² <https://www.amazon.co.uk/Skinny-Lager-Calorie-Beer-Bottle/dp/B07N8JBSTQ>

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- 3 years YoY growth across off-trade data from SkinnyBrands EPOS Multiples sales.
- Most Reviews for a UK lower calorie lager at a 4.6 star rating for 12 Pack (1988 Reviews Sept 2021).

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