

2 SEPTEMBER 2023

The Grocer Guide to...

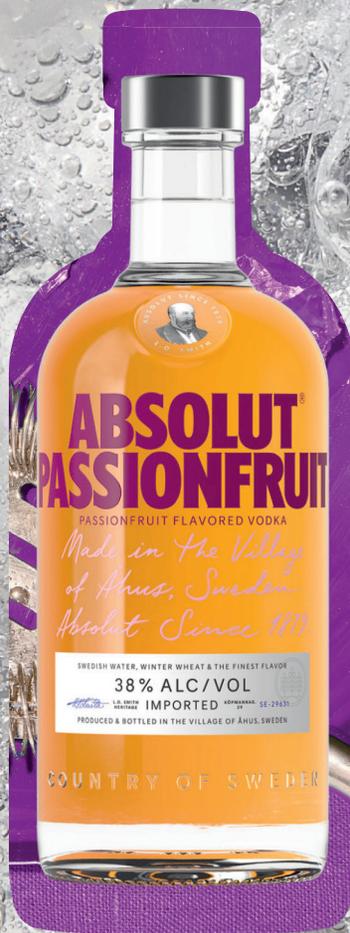
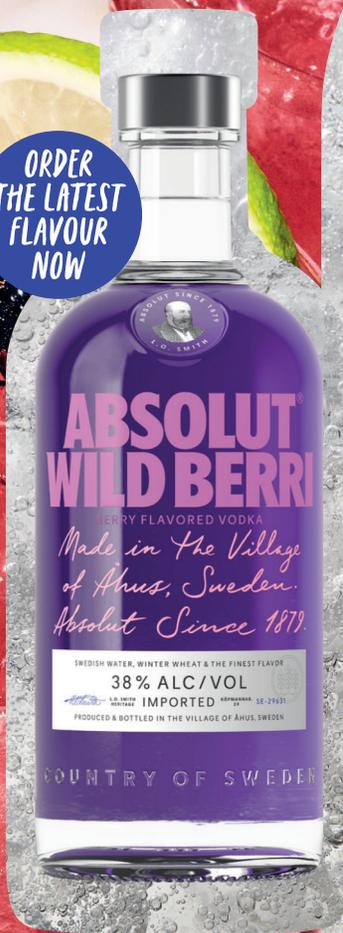
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Analysis



Measured approach

In a cost of living crisis, quality, flavour and moderation remain the key market drivers

While some may believe the premiumisation trend is over during the current economic turbulence, the experience portrayed by suppliers in this supplement suggests the contrary. Premium brands seem to be capturing consumers' interest, as they opt for drinking less but better. And, as the Christmas season approaches, suppliers are looking to invest behind their key brands, to encourage shoppers to indulge in affordable treats.

At the same time, the low & no category continues to flourish, as consumers, particularly the younger generation, pursue healthy lifestyles. However, the deciding factor in

purchases remains quality and flavour, as, in financially turbulent times, consumers will not part with hard-earned cash for anything less. So, how is the market shaping up and what positives can be drawn from current category trends?

Overall performance

According to Alexander Wilson, category & commercial strategy director at Heineken UK, the beer and cider categories have grown by 0.6% and 0.3% year to date (YTD)¹, with premium lager performing particularly well, up 7.7% YTD². The latter trend has been consistent for the past two to three years, he says, with the company's

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Analysis

premium Birra Moretti lager brand driving the growth. This is despite the cost-of-living crisis. “Although shoppers have reduced the amount they are purchasing, they are choosing to trade up. While shoppers are attempting to make savings across large expenditures, such as household bills or eating out, smaller purchases like alcohol are one area where consumers are happy to spend a little more,” he notes.

Events across the year so far, such as the Coronation did boost business, with Heineken UK’s sales up 7.4% in May³ thanks to three Bank Holidays, including the Coronation, demonstrating the importance of stocking up on key brands across busy event periods, he adds.

Big events are always big opportunities for retailers, agrees Kevin Fawell, off-trade sales director at Molson Coors Beverage Company. “They bring opportunities to drive sales across a host of different categories that are popular during occasions celebrated at home – not only alcohol, but things like snacks, soft drinks and other categories that lend themselves more naturally to sharing occasions.”

With the Rugby World Cup coming up, he notes that ales like Doom Bar or Doom Bar Zero are popular choices when that sport is on. “So, putting these at the heart of rugby-themed displays is the perfect way to encourage shoppers to pick up drinks and snacks to enjoy when they’re watching the game at home.”

In general, Fawell believes the beer and cider category is “vibrant and full of innovation”. “This diversity is part of what makes the category so appealing,” he says. Moreover, he points to the popularity of premium drinks and the increasing popularity of world lagers, which he says now account for more than one-third (36%) of total lager sales in the off-trade, up from 28% three years ago⁴. Within that, since its launch in the off-trade in March 2022, the company’s Madrí Excepcional brand has generated sales worth more than £86m⁵ in retail,” he says. Meanwhile, its Staropramen brand has also grown in value by 6%⁶, benefiting from significant investment, he adds.

When it comes to cider, the category is performing well, says Nicholl Coy, senior customer marketing manager at Kopparberg. She reports growth in



value across the 52, 12 and 4 weeks⁷, with the convenience channel slightly more resilient than supermarket grocers as shoppers adapt their style to react to the cost-of-living crisis. “Interestingly, shoppers are being more measured in their main shops when it comes to beer, wine & spirits (BWS), then making last-minute convenience ‘panic’ purchases at the weekend or if we see any burst of sunny weather,” she says.

Both up and downtrading are evident, adds Coy. “To save money, consumers are trading into the value segment of the market with the appeal of an accessible price point, but we also see premium brands benefiting as consumers look for their favourites. Consumers aren’t willing to compromise on taste, as they are already sacrificing their on-trade experience,” she notes.

Most spirits categories are in decline, reporting an overall fall by volume of -6.9%, with Scotch whisky faring only slightly better at -3.5%⁸, reveals Jamie Stewart, commercial director at LMB-UK. “However, we have seen our

single malt whisky Glen Moray Classic completely buck this trend in the same period and achieve 7.1% growth⁹, making it the UK’s fourth best-selling single malt¹⁰,” he adds. “I think this is an indicator of one of the prominent trends in today’s spirits market. As the cost-of-living crisis deepens, one of the drivers behind Glen Moray’s growth is its ability to deliver an excellent quality Speyside single malt at a price that is more accessible to shoppers than many of our competitors. In the supermarket spirits aisle, quality and choice will always count when it comes to whisky, but for today’s price-savvy shoppers, there also has to be good value.”

Meanwhile, on 1 August the government shook up the duty system for alcoholic beverages¹¹, with varying impacts on beer, cider, wine, whisky and cans of spirits-based RTDs. How wines and spirits perform following these changes remains to be seen, says Kingsland Drinks head of marketing and product management Jo Taylorson. “The first stress test will be Christmas, as consumers will naturally start to



Flavour in favour across the board

Flavour innovation continues to be big news in the BWS sector. “One of the big trends we are seeing cross over into the dark spirits aisle is the rise of flavour,” says LMB-UK commercial director Jamie Stewart. “We’re currently seeing an explosion of innovation, with exciting new styles and tastes – and our brands are leading this charge.”

For Glen Moray, the company has recently introduced its new Twisted Vine Cognac Cask matured single malt earlier this year. “The response to this whisky’s bold

flavour and packaging has exceeded all expectations,” he says. “In September, we are innovating with flavour again, with the launch of the Caribbean rum El Galipote to the UK market. We’re putting flavour front and centre for this: our first two variants are the light, strawberry-flavoured Pink variant and the rich, intense Spiced flavour.” Both are ideal for sipping or in cocktails, he adds. “In white spirits we also recently launched the premium 100% rye Polish vodka Sobieski, which is selling well and, again, offers a

different, very smooth and silky taste for vodka fans to try.”

Flavour is also front and centre at Heineken UK with the launch earlier this year of its Strongbow Tropical Cider, a blend of mango and pineapple, which coincided with the redesign of the Strongbow Masterbrand, reveals category & commercial strategy director Alexander Wilson. The stripped-back design centres on the brand’s iconic archer, with vibrant pops of colour, which the company hopes will help attract a fresh generation to

the brand, he says.

For Kopparberg, autumn and winter bring a nostalgic twist to its portfolio, with the introduction of Sweet Pear Vintage Cider, which indulges in the flavours of its original Pear Cider recipe. “It’s a timeless choice for those seeking a taste of the past with a modern twist,” says senior customer marketing manager Nicholl Coy. She adds that high-abv cider is increasing its category share year on year¹ as shoppers look to prioritise fewer but bigger drinking occasions with stronger but easier-to-drink products.

tune into the changes as they dwell on fixtures more.”

She says the Andrew Peace Australian wines brand, which Kingsland supplies in the UK, has introduced new lower-abv SKUs in addition to its core Signature range, with a new-to-market Shiraz and Chardonnay at 11% abv in 75cl and 2.25L bag-in-box (BiB) formats, for example.

Indeed, BiB formats in wine are seeing sales up £5.4m or 1.7%, showcasing “a clear commercial opportunity”, she adds. The company has invested in boosting its capacity for BiB to 28m litres of boxed wine a year, in 1.5L, 2.25L and 3L formats. And it recently expanded its Campaneo wine range to include a new Sauvignon Blanc variety and a new BiB format.

Cocktails and premiumisation

As more consumers feel the economic pinch, at-home mixology remains on-trend, according to a recent report by Global Drinks Intel². “The emergence of the kitchen bar came during the lockdown years. But now, the crunch on disposable income,

driven largely by rising inflation, has us all googling recipes instead of heading out to the nearest bar,” it says.

Also, social media influence has spurred on the home mixology trend, activated during the Covid 19 pandemic, as consumers aspire to create affordable luxury experiences in their home, according to US marketing solutions company snipp.com³. And that trend is linked inextricably with the growth in premium spirits.

One company invested in that trend is Pernod Ricard UK, which believes that driving premium+ spirits will be more important than ever in the run-up to this Christmas as they have shown resilience during the recent economic turbulence – and cocktails made at home are still proving to be popular.

Whisky is the star ingredient of many of today’s most popular and premium cocktails, from classics like Old Fashioned or Whisky Sour to more modern Smashes and Highballs, says LMB-UK’s Stewart. “Having refined their cocktail skills during lockdown, people are still enjoying a homemade

cocktail to treat themselves or their guests,” he notes. “For cocktails at home, people want to experiment and enjoy the experience with quality, great-tasting spirits that are good for mixing and are not intimidating. Single malts are sometimes perceived as spirits to keep at the back of the drinks cabinet for an occasion dram, but Glen Moray is one of the whiskies changing that perception.”

Canned cocktails are a big growth area, says Kopparberg’s Coy, adding that its new Sparkling Tropical Rum Punch is selling well as shoppers look to recreate on-trade occasions at home.

Meanwhile, at Kingsland Drinks, which offers canned cocktail brand Mix Up, Taylorson says: “Drinking habits have evolved with changes in lifestyle, new socialising habits and the cost-of-living crisis to the point where we can say cocktails at home are here to stay. While the UK may never see RTDs – cocktails, wine and spirits and mixers – reach the popularity levels seen in the US, an avalanche of NPD tuned into popular flavour profiles means

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the consumer is spoilt for choice. The challenge for the category is to ensure quality is placed at the forefront of product development, while keeping prices at a point where consumers can trial classics and new flavours in a format they are still grappling with.”

The company launched three new Mix Up canned RTD SKUs this summer in Rum & Cola, Pink Gin & Diet Lemonade and Apple Rum, Lime & Ginger Ale, which “tap into established and emerging flavour trends and offer an accessible price point”, says Taylorson.

Heineken UK’s Wilson points out that, as consumers become more conscious about their impact on the environment, many are favouring brands with a commitment to environmental sustainability. This, he says, is embedded in Heineken UK’s business, with the company launching its ‘Brew a Better World’ programme last year. “We’re committed to reducing our environmental impact alongside helping our customers be more eco-friendly,” he says. “We also announced our commitments to fully decarbonise production sites by 2030, and full value chain – including packaging and logistics – by 2040.”

Last year, the company also launched the latest version of its sustainable packaging solution – the Green Grip, offering 100% recyclable cardboard solutions for can multipack toppers. Since its initial introduction in 2020, this has saved 336 tonnes of single-use plastic, adds Wilson.

Making the most of merchandising

In a market that is always competitive, having a good selection of familiar brands alongside exciting NPD is key to encouraging interest and purchase. However, getting the balance right is not always straightforward.

Although the BWS aisle is “always vibrant with a plethora of different brands and pack formats, targeted towards different consumers and occasions”, clearer segmentation and impactful signposting is vital to make it easier for shoppers to find what they want, says Molson Coors’ Fawell. “For example, simple things like having distinct sections for core lagers and world beers,” he says. “There’s also a job to be done around educating consumers about the latest product launches and new lines, to ensure you



can tap into the excitement they bring and catch the eye of those wanting to try something new. This can be difficult for stores as shelf space can be limited, so suppliers have an important role to play here too.”

More brands are now using technologies such as on-pack QR codes to tell the stories behind their brands, he adds, noting also that experiential activations outside of the aisle can also help drive brand awareness, giving time for consumers to stop, browse and understand more about the brand and, where possible, talk to a brand ambassador. “We have recently launched experiential in-store executions across Madri Excepcional and Coors, with positive consumer and customer feedback,” he reports.

Pernod Ricard UK is advising retailers to get in on the act early for Christmas as shoppers look to spread the cost of the festive season. Off-trade channel director Chris Shead anticipates “a significant shift from the on-trade to the off-trade as consumers choose to host at home and manage budgets. This

presents a huge opportunity for our customers,” he notes.

Meanwhile, beyond the bricks & mortar outlets, specialist online whisky and spirits shops have always been very important for LMB-UK’s products, says Stewart, adding that the company has made real progress on broadening this out in the past year, in particular through its brand pages on Amazon. “As well as supporting sales, these online channels act as a good shop window for our brands,” he says. “They have the ability to fully immerse people in the story of our products, and we find that this is where people often do their homework and compare prices, even if they end up making their purchase somewhere else or in a physical store.”

Category drivers ahead

As Christmas approaches, suppliers are looking to retailers to help them provide excitement in-store and stimulate purchase, envisaging ideal opportunities to do so.

Premiumisation will continue to grow this Christmas, says Heineken UK’s



Low & no continues to gain traction

Low & no options continue to grow in popularity, with more and more innovation entering the market, says Molson Coors off-trade sales director Kevin Fawell. “With more options to choose from, it’s increasingly important that zero-alcohol drinks truly deliver on flavour,” he says. Earlier this year, the company launched Staropramen 0.0, adding to its existing low & no offering, which includes lager brand Cobra Zero, cider brand Rekorderlig Alcohol Free and Doom Bar Zero ales.

For Kopparberg, low & no is a huge area of focus as younger drinkers increasingly choose to abstain from alcohol or look to actively reduce their consumption, says senior customer marketing manager Nicholl Coy. Kopparberg Alcohol-Free has the highest penetration in the low & no cider categoryⁱⁱ, she adds. “We see low & no growing as shoppers try to adopt a healthier lifestyle, but also to cut costs and enjoy a similar drinking experience. Interestingly, when no & low is promoted alongside its alcohol

counterpart, we see much bigger uplifts as shoppers are willing to trial the category.

As the sector gains momentum, different brands are partnering with different supermarkets to establish dedicated bays for low & no. Last year, Heineken took part in a trial with Sainsbury’s to install Heineken-branded low & no fixtures in 30 stores across the UK, resulting in sales of low & no growing by 17%ⁱⁱⁱ, says category & commercial strategy director Alexander Wilson. “There is a lot of opportunity to bring excitement to the low

& no sector and how it is presented in-store,” he notes.

The company is continuing to invest in its low & no alcohol portfolio to make it easier for shoppers to reach for such options in their weekly shop, he adds. “Whenever a consumer encounters one of our beers or ciders, we want to make sure there is an alcohol-free option sitting alongside our alcohol drinks,” he explains. Heineken 0.0 continues to lead the low & no category with a 19.2% share of non-alcoholic beer^{iv} and is growing by 6.7% YoY^v.

Wilson. Premium lager has risen by 10.6% in the last quarter, with massive growth in penetration as consumers want better-quality products¹⁴, he says.

Secondly, Gen Z are adopting the mindful drinking trend and looking for ways to incorporate alcohol into healthier lifestyles – something we aren’t expecting to slow down over the festive period, he adds. “Our research from last year showed that 41% would be looking for lower-alcohol or alcohol-free options to drink at Christmas (55% of Gen Z)¹⁵ and we would predict the same for this year.”

Finally, during special occasions, consumers tend to gravitate towards familiar brands they know and love, he adds. So Christmas presents a great opportunity to increase sales across brands such as Fosters, currently No.2 in the classic lager category¹⁶ and benefiting this year from a £4m investment campaign, which includes TV and digital advertising, strategic partnerships and on-pack promotion.

Premiumisation is a key trend, agrees Kopparberg’s Coy. “Consumers are

looking for trusted brands to deliver quality refreshment for their accessible treating needs,” she says. However, she also notes that aligning to the season and the occasion it brings by providing seasonal flavours is key, and brings excitement to the fixture in-store.

Consumers are also looking to trusted leading brands to deliver a strong alcohol-free offering that delivers on taste, she adds, as moderation is increasingly important, particularly among the younger generation.

Stewart at LMB-UK says the industry is entering the “golden quarter for dark spirits”, with all the big festive occasions coming that demand “a glass of good whisky” in the hand. “This is also a prime time for single malt gifting,” he says. “Plus, people naturally tend to consider warming drinks, such as whisky and brandy in the colder months, all of which will deliver a natural sales lift.”

However, he points to a changing dynamic in the Cognac and brandy market, which he says has been “a very staid category that has been

polarised for years – with cool, expensive Cognac on one side and old-fashioned brandy on the other”. This is all starting to change, he says. “Brandy is enjoying a resurgence, driven by NPD, new market entrants and the exciting prospect for consumers of rediscovering a largely forgotten traditional spirit.”

LMB-UK is investing in a major marketing drive for its Bardinet French-style brandy in the final months of 2023 and promises the release of some exciting NPD into the grocery channel, he reveals.

Sources

¹³ NielsenIQ, YTD to 29.07.23

⁴⁻⁶ Circana, All Outlets, value sales for 52 w/e 15.07.23

⁷ EXT IRI Marketplace, Total Cider, 52, 12 and 4 w/e 09.07.23

⁸ Nielsen, L52wk MAT w/e July 2023

⁹⁻¹⁰ Nielsen, L26wk MAT w/e July 2023

¹¹ <https://tinyurl.com/3r6vuhrc>

¹² <https://tinyurl.com/mr2h3bnt>

¹³ <https://www.snipp.com/2023-alcohol-industry-trends>

¹⁴ Nielsen, 4 weeks to 28.01.23

¹⁵ Heineken UK data, KAM research, November 2022, commissioned by Cirkle on

behalf of Heineken UK, n=500
¹⁶ NielsenIQ, YTD to 29.07.23, Total Coverage

Flavour

ⁱ IRI Marketplace, Total Beer & Cider, MAT to 27.11.22: High ABV cider is outperforming total cider by 11%, increasing its category share to 6.5% vs 2021

Low & no

ⁱⁱ Kantar, 52 w/e 11.06.23

ⁱⁱⁱ SIP, First 10 weeks to 26.09.22

– a 95% increase vs control stores

^{iv-v} See 1-3

Heineken UK

No & low leads beer and cider

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KEY BRANDS

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Heineken® 0.0
Cruzcampo
Fosters
Desperados
John Smith's
Old Mout
Strongbow
Inch's

 The no & low alcohol trend has seen an exponential increase in popularity, growing by 16.4% YTD¹, and is now the fastest volume growth driver across the beer, wines and spirits (BWS) category². While January was previously the high watermark for no & low, participation in this category now mirrors total beer and cider throughout the year and is bought year-round, with drinkers engaging in more 'mindful drinking' and moderating their alcohol intake, says Alexander Wilson, category & commercial strategy director at Heineken UK.

"There have been many new entrants to the category in the past year, providing a greater range of choice for consumers," he notes. "At the same time, we've also seen sales consolidating across established beer brands that are trusted by consumers, providing a great opportunity to increase sales as consumers frequently stay brand loyal in stores."

Heineken UK is the market leader in no & low³ and over-indexes as a brewer in the sector, says Wilson. "As stated in our 2030 Brew A Better World ambitions, we believe in empowering consumers by providing a choice, transparency and zero tolerance for the abuse of alcohol," he explains. "As of 2020, we had over 130 non-alcoholic line extensions globally, bringing a huge portfolio of choice to suit different shoppers' drinking preferences. Heineken 0.0 continues to lead the UK's no & low category, with a 19.2% share of non-alcoholic beer⁴, and growing by 6.7% year on year⁵."

While lager holds the lion's share of non-alcohol in beer and cider, ale and craft brands are also on the rise, helping to normalise the segment, adds Wilson. "Further to our commitment to drive innovation within the category, three years ago we launched Birra Moretti Zero, an alcohol-free option from our leading premium beer brand, to attract new shoppers to the segment. For cider drinkers, our Old Mout Berries & Cherries Alcohol Free Cider and Old Mout Pineapple and Raspberry Alcohol Free Cider are great alcohol-free options, made using natural flavours – just like their alcoholic counterparts."



“As of 2020, we had over 130 non-alcoholic line extensions globally, bringing a huge portfolio of choice to suit different shoppers' drinking preferences”

As the no & low segment matures, the company recommends implementing signage and visibility tactics to help shoppers easily navigate fixtures, says Wilson. As a category champion, last summer Heineken UK conducted research into shopper behaviour in no & low to understand how to best to merchandise an area that is unfamiliar to many shoppers and can be difficult to find. On the back of this research, in Q3 2022, Heineken UK created bespoke 'No & Low' bays with retailers such as Sainsbury's, to signpost the range on offer and educate shoppers. The bays included refrigeration and digital POS to signpost the segment and the trial resulted in sales of no & low growing by a huge 17% in activated stores⁶.

"Looking ahead, we're dedicated to investing in our no & low alcohol portfolio and initiatives to make it easier for shoppers to reach for such options. Our ambition is that whenever a consumer encounters one of our beers or ciders, we want to make sure there is an alcohol-free option proudly sitting alongside."

Source

¹ Nielsen YTD to 08.07.23 – Total Coverage
² Nielsen IQ: YTD to 29.07.2023 – Total Coverage
³ SIP, First 10 weeks to 26.09.22 – a +95% increase vs control stores



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Drinks category solutions

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KEY BRANDS

Campaneo
Mix Up
The Hidden Sea
Baron de Ley

After a sustained pipeline of investment and innovation – against the backdrop of one of the toughest economic climates in recent history – Kingsland Drinks Group's far-reaching expertise, services and capabilities place it firmly at the heart of the industry. It now boasts world-class production and manufacturing facilities, plus dedicated teams focused squarely on liquid, flavour and NPd.

From sourcing wines stocked in major retailers, to developing contemporary craft spirits, RTDs and low- & no-alcohol drinks, Kingsland Drinks drives a raft of own-brand and white-label drinks that are flying in UK retail, it notes.

In the can

Paul Braydon, head of buying, says: "Investment in our canning technology and production facility enhanced our offering but also led to the development of our Mix Up canned RTD brand in 2020. We launched three new SKUs this summer – Mix Up Coffee Rum & Cola, Pink Gin & Diet Lemonade and Apple Rum, Lime & Ginger Ale – which tap into current flavour trends, at an accessible price point."

Time for wine

A long-time partner to premium winery Baron de Ley, Kingsland Drinks recently launched the brand's new Seduction range. Comprising Rosado de Lágrima, Blanco Sobre Lías, and Tinto Selección, it aims to both attract Rioja's existing consumer base while targeting younger audiences with its youthful look and contemporary flavour profiles.

Meanwhile, its eco, ocean-saving wine brand, The Hidden Sea, is able to draw in younger consumers, as the



Source

¹Circana All Outlets, BiB performance, 52wk Value (£) to 11.06.23



“Investment in our canning technology led to the development of our Mix Up canned RTD brand in 2020. And this summer we launched three new SKUs”

lifestyle brand appeals to those seeking to spend on products that stand for more. The wine takes 10 plastic bottles out of the ocean for every bottle sold.

Its Campaneo brand – hailing from the Campo de Borja region and developed specifically for the value end of the market – combines quality coupled with Spanish cues to resonate with consumers. Braydon says: “We grew the Campaneo range this summer by adding a new Sauvignon Blanc variety and convenient 2.25L bag-in-box (BiB) format, which extends the offering into new parts of the market.”

Kingsland Drinks is well ahead of the game on BiB wines, boosting its capacity to around 28m litres of boxed wine a year in 1.5L, 2.25L and 3L formats. Total BiB sales are up £5.4m or 1.7% over the last 52 weeks¹. Braydon adds: “Consumers are switching on to BiB wines, so we must embrace what they offer: recyclability, affordability, and longer-lasting wine.”

In good spirits

The company's world-class technical team, and its own craft spirits facility partnering with Manchester Still, enable Kingsland Drinks and its sister company, Ten Locks, to produce artisan spirits and low- & no-alcohol drinks at its Salford site. “Part of our business is working with spirits brands and low- & no-alcohol products,” says Braydon. “We've developed, packed, and distributed some of the most popular spirits and alcohol-free brands in the world, so we're well positioned to support all areas of the industry.”

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KEY BRANDS

Glen Moray Single Malt Scotch Whisky
 Bardinet Brandy
 Cutty Sark Blended Whisky
 Label 5 Blended Whisky
 El Galipote
 Sobieski Polish Vodka
 Marie Brizard

With one of the UK's fastest-growing single malt whiskies in its portfolio, LMB-UK commercial director Jamie Stewart has a good idea what drives success in the otherwise declining spirits market. With total spirits sales volume down by -6.9%, and total malt whisky faring only slightly better at -3.1% volume¹, LMB-UK's Speyside whisky Glen Moray Classic is up 73% by volume, making it the UK's fourth-largest single malt².

"These numbers tell us that today's consumers want quality, as is always the case in the whisky market, but there also has to be value," he says. "The cost-of-living crisis is really biting, but shoppers who treat themselves in the premium spirits aisle every month don't want to 'trade down' to an untrusted brand they won't enjoy at home. So high-quality spirits at an accessible price, like Glen Moray, hit the sweet spot and provide the volume and value sales that our trade partners are looking for."

This formula runs across the LMB-UK portfolio, which also includes the best-selling French-style brandy Bardinet, Polish vodka Sobieski and the global blended whiskies Cutty Sark and Label 5, notes Stewart. But he also highlights other success factors at play as the company moves into the crucial golden quarter for spirits sales.

The first is flavour. "Drinkers' desire for new flavours has crossed over from gin and vodka into the dark spirits aisle and it's driving some exciting



“High-quality spirits at an accessible price, like Glen Moray, hit the sweet spot and provide the volume and value sales our trade partners are looking for”

innovation,” he explains. “Demand for Glen Moray’s recently launched Twisted Vine expression, which is matured in Cognac casks and builds on the distillery’s ‘cask explorer’ reputation, has exceeded all expectations. This is a whisky with bold flavours and packaging, which has really hit the mark with consumers. We’ll also soon be launching the Caribbean Rum El Galipote to the UK market, with flavour front and centre – our first two variants being the light, strawberry-flavoured ‘Pink’, and the rich, intense ‘Spiced’.”

A second and more surprising trend is an exciting new dynamic in the brandy sector, he adds. “Cognac has stolen brandy’s limelight for years, but it’s rising in price and is less affordable for many shoppers. The result is some exciting NPD and new entrants to the classic brandy category, prompting new consumers to explore an often-forgotten traditional spirit. LMB-UK is leading the charge and Q4 will see us continue to invest in some exciting marketing and NPD for Bardinet Brandy, currently growing at 3.6% by value in the UK³.”

Finally, with the market in flux, Stewart says his team has stayed agile and alert to what its trade partners need. “Alongside an unwavering commitment to quality, this ability to listen and adapt is a major factor in our current success.”

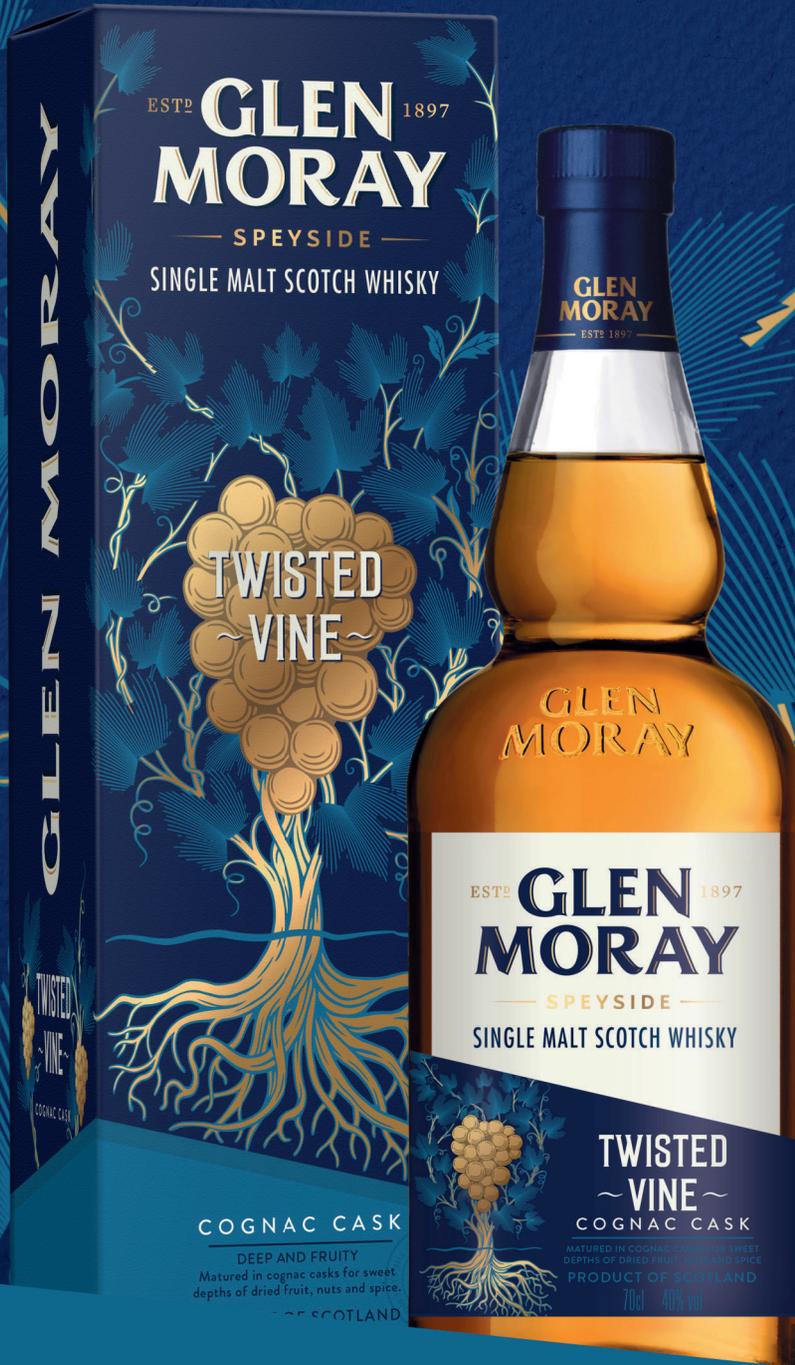


Source

^{1,2} Nielsen, L52wk MAT w/e July 23
³ Nielsen, L26wk MAT w/e July 23

ESTD **GLEN** 1897
MORAY

— SPEYSIDE —



ESTD **GLEN** 1897
MORAY
— SPEYSIDE —
SINGLE MALT SCOTCH WHISKY

**TWISTED
~ VINE ~**

**GLEN
MORAY**

ESTD **GLEN** 1897
MORAY
— SPEYSIDE —
SINGLE MALT SCOTCH WHISKY

**TWISTED
~ VINE ~**

COGNAC CASK

COGNAC CASK

DEEP AND FRUITY

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depths of dried fruit, nuts and spice.

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DEPTHS OF DRIED FRUIT, NUTS AND SPICE

PRODUCT OF SCOTLAND

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THERE'S A NEW TWIST ON SPEYSIDE SINGLE MALT WHISKY

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For more details contact UK Marketing Manager James Collins
james.collins@glen-turner.co.uk

**TWISTED
~ VINE ~**

Kopparberg

Bringing timeless quality to shoppers

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Nicholl Coy
Senior Customer
Marketing Manager

Source

^{1&2} Savanta, Top 100 Most Loved Drinks Brands report, n=96,000, Jun '22- Jun '23/ Gusto Research, Internal Brand Tracking, All UK adults (2,108) weighted base, omnibus survey 22-24.04.23
³ Kantar, WPO, Buyers, MAT to 19.03.23
⁴ IRI Data, Fruit Cider, Value Sales, 52wks to 16.04.23

Since its launch, Kopparberg has built its reputation as an expert in premium fruit refreshment and created a loyal customer base along the way, says senior customer marketing manager Nicholl Coy.

A focus on flavour and positioning has seen Kopparberg consistently ranked as the most loved¹ and best-tasting cider brand in the UK², she reveals. With more customers than any other cider brand³ and a product loved by drinkers nationwide, Kopparberg has cemented a position as the best-selling fruit cider in the market⁴

Consumer-centred NPD

“Kopparberg’s success is linked to the strength of its core variants as well as relevant, consumer-centred NPD,” says Nicholl.

“As consumers look forward to the arrival of autumn and winter, and the many seasonal occasions this time of year offers, Kopparberg will introduce



“Our success is linked to the strength of our core variants, as well as consumer-centred NPD”

Sweet Pear Vintage Cider. Indulging in the nostalgic flavours of its original Pear cider recipe, Kopparberg’s Sweet Pear Vintage Cider is a timeless choice for those seeking a taste of the past with a modern twist.

“These principles are reflected in the bottle label and can designs which set the scene and serve a stronger but easier to drink cider.”

A new
take



on an old
classic

Kopparberg Sweet
Vintage Pear

TO FIRSTS THAT LAST _

Molson Coors Beverage Company



A balanced range for all occasions

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KEY BRANDS

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

 Kevin Fawell, off-trade sales director at Molson Coors Beverage Company, argues that getting the balance right between low & no and premium brands is key to an effectively stocked beers, wines and spirits shelf.

“In an increasingly diverse market, it’s more important than ever for retailers to stock a varied and balanced beer and cider range that offers something for everyone, from core favourites to more premium options,” he says.

“We continue to see new innovations bring more excitement and drive growth in the premium space. We launched Madri Excepcional 18 months ago, and it has already generated more than £86m¹ in retail and was the most successful new product launch in the alcohol category across grocery during 2022².

“It’s also important to stock up on popular favourites like Carling, the No.1 lager brand in Great Britain³; Doom Bar, the No.1 amber ale in GB⁴; and Coors, which is up 4.7% in value sales⁵.”

Another trend is the ever-increasing popularity of low & no alcohol options, he adds. “While there are more 0.0% options available than ever before, we know consumers want zero-alcohol drinks that still truly deliver on flavour.

“To help retailers capitalise on this, Staropramen has perfected a method to offer a full-flavoured Czech pilsner with zero alcohol – Staropramen 0.0. It’s the latest addition to our growing range of 0.0% options which include Doom Bar 0.0, Cobra Zero and Rekorderlig Alcohol Free,” he says.

Source

^{1,2} Circana All Outlets, value sales for 52 w/e 15.07.23

³ Circana All Outlets, value sales for 52 w/e 15th July 2023 and CGA GB Value Sales

^{4,5} Circana All Outlets, value sales for 52 w/e 15.07.23



ZERO ALCOHOL, ALL THE TASTE.

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Pernod Ricard UK – Chivas

Chivas raps up summer vibes

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 Off-Trade Channel Director

KEY BRANDS

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

 Blended Scotch whisky Chivas has been giving fans the opportunity to drink like a ‘Don’ this summer through a limited-edition drop of its classic Chivas 12, in partnership with one of the hottest names in rap – Stefflon Don. Continuing its commitment to inspire the next generation of Scotch drinkers from around the globe through its ‘I Rise, We Rise’ campaign, Chivas has teamed up with the iconic artist, to celebrate those who are redefining success and elevating their crew along the way.

Inspired by the rapper’s highly anticipated debut album ‘Island 54’, the limited-edition Chivas 12 x Stefflon Don updates Chivas 12’s iconic design with a tropical twist that reflects the album’s island theme. Palm tree illustrations in splashes of bold blue and hot pink are complemented by Chivas’ iconic gold across the design, uniting the artist’s trademark energy with the Scotch whisky’s bold style. The design also features the rapper’s signature in a striking neon font.

Stefflon Don comments: “Everyone knows I’m a fan of Chivas, so I’m glad the news is finally out there that we’ve teamed up to drop our own bottle inspired by my new album. Island 54 is a celebration of the diverse cultures and artists that inspired me on my journey, and this is what our collab is about. It’s more than just whisky and music, it’s about us sharing the same ethos around working together to carve your own path to success and celebrating the melting pot of cultural influences that inspire us to create something unique. The design is also pure summer vibes – the label, the colours, the artwork – everything about it is a true work of art and only the start of our journey.”

Ongoing partnership

As tastemakers in the drinks and music industry respectively, with a shared commitment to leaving a legacy, the limited-edition drop is the latest move in the ongoing partnership between Chivas and Stefflon Don, with more activity to be unveiled in the coming months. The collaboration celebrates those who, through teamwork and



“It’s more than just whisky and music, it’s about us sharing the same ethos”



dedication, have boldly carved their own path, reaching new heights and rewriting the rules for the next generation, explains Liam Murphy, brand director at Pernod Ricard UK. “As a global powerhouse of the music industry, Steff has worked with her close-knit team on a collective journey to create fresh paths to success, not only for herself but also a new generation of artists, showing that success is built not by one person, but by many,” he says. “We’re proud to bring Steff even further into the Chivas family by introducing our limited-edition Chivas 12 to her legions of fans.”

‘The Don’ cocktail

To celebrate the collaboration, Chivas has worked with Steff to create a luxurious cocktail inspired by the musician’s favourite flavours. Entitled ‘The Don’, it blends fruity, tropical flavours of pineapples, berries, and lime with the smooth, rich, and generous taste of Chivas 12.

Chivas 12 x Stefflon Don (RRP £32.80) dropped on 15 August in Tesco, Sainsbury’s, Asda, Co-op, Amazon and convenience retailers.

CHIVAS REGAL STEFFLON DON

Steff Don

**NEW
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EDITION
BOTTLE**



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Pernod Ricard UK – Christmas

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 Commercial Director

KEY BRANDS

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

↙ Cocktails and gifting will be key to driving incremental sales during the Christmas period this year, says Pernod Ricard UK.

Stubbornly high inflation rates and the cost-of-living crisis are factors likely to impact this year's festive season. However, Pernod Ricard UK believes premium+ spirits provide convenience retailers with the opportunity to win big, it says. "Driving premium+ spirits will be more important than ever this Christmas and with good reason, as its resilience during the current economic turbulence has been strong, delivering consistent double-digit value growth¹."

Pernod Ricard UK continues to significantly outperform the sector, with value sales up 7.2% and market share rising by 2.7%, making it the fastest share gaining wine and spirits supplier in the UK², it says. "With 80% of shoppers agreeing that food and drink are a good option as an affordable gift³, premium+ spirits will play an important role in the gifting space as they are viewed as an affordable option."

Pernod Ricard UK is urging retailers to plan for two key occasions this Christmas – gifting and hosting – and advises them to cater for those looking to spread the cost of Christmas across more months by offering gifting options as early as October. Campo Viejo Reserva and Havana Club 7-Year-Old are both getting a makeover to provide the perfect gifting solution, it says. Launching in November, the premium Campo Viejo Reserva limited-edition bottle showcases the contemporary



“With 80% of shoppers agreeing that food and drink are a good option as an affordable gift³, premium+ spirits will play an important role in the gifting space”

boldness of the brand through artist Misterpiro's interpretation of Pasión, while the new gold design Havana Club 7-Year-Old features textured swirls on the label for a festive edge.

More at-home celebrations are also expected as shoppers host affordable occasions for friends and family. So, the UK's No.2 premium wine and spirits company⁴ is placing its bets on five of its leading spirit brands – Absolut, Malfy, Malibu, Altos and Jameson – and with searches for cocktail inspiration up 55%⁵, it will support retailers with knowledge to help upsell basic cocktail ingredients to shoppers.

Chris Shead, off-trade channel director at Pernod Ricard UK, says: "We're hugely excited for Christmas 2023 as it's time for premium spirits to reclaim the occasion after beer dominated during last year's Football World Cup. In the current climate, we anticipate a significant shift from the on-trade to the off-trade as consumers choose to host at home and manage budgets. This presents a huge opportunity for our customers, and winning in cocktails remains key to success. For the convenience channel, in particular, premium+ spirits offer a point of difference to the larger supermarkets, which are increasingly challenged by the discounters."



Source

- ¹ Premium+ Spirits % Value Share of Total Spirit Sales Varying Time Periods to 31.12.22
- ² Off-Trade Spirits Nemo Report 17.06.23
- ³ Mintel Food and Drink Gifting, 2022
- ⁴ NielsenIQ Total Coverage 52W to 17.06.23 and CGA OPMS 52W to 17.06.23
- ⁵ Pinterest Predicts 2022

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