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The Grocer Guide to...

The Grocer

Beer & cider



Analysis

Summer in their sights

Inflation has seen the beer & cider category facing cold headwinds over the past year, and suppliers are hoping for a warmer time ahead as the summer's sporting season kicks off



As recent inflationary pressures continue to take their toll on UK consumers' spending trends, the beer & cider category is having to ride out the storm, as varying trends have resulted in a polarisation between value and premium brands.

According to one recent report¹, the price per litre for cider has risen from £2.38 last year and is now averaging £2.55, in part due to inflation but also due to trading up, and it seems clear that the middle ground of the market is losing out, as consumers opt to spend less but better, or seek out value options that don't tax their wallets too strenuously. However, after several quarters of decline, brewers and cider-makers are looking ahead to 2024's summer of sport, which they hope will revive their recently flagging performance, according to Reuters².

Category suppliers acknowledge that times have been tough of late but are optimistic that recent product innovation, coupled with the onset of warmer summer weather and the promise of a number of key sporting occasions, will help give them a much-needed boost.

Lager and ale: innovation stays key

In the UK, the total beer market has grown to be worth £5.5bn³, driven by increased interest in new formats, innovation and styles, says Alexander Wilson, category & commercial strategy director at Heineken UK. "Within grocery, the category is worth £3.6bn⁴, while in impulse, including convenience and independent stores, this figure stands at £1.5bn⁵, boosted by brands such as Foster's, Birra Moretti and Heineken, having

combined value shares of over 11% in the beer category⁶.

"Over the course of the past year, we have noticed a shift in buying habits among adult consumers, seeing more people switching from wine and spirits to both beer and cider, with beer and cider penetration sitting at 70% across the UK⁷," he adds. "Some of this can be attributed to shoppers managing their budgets in the cost-of-living crisis, as one of the strengths of beer and cider is that there are a range of pack formats across the pricing spectrum. It's important for retailers to stock formats across single bottles, alongside small-medium- and larger packs to cater to all occasions and budgets.

"Alcohol overall remains the biggest contributor to retailers' total sales and, within the category, beer commands the biggest volume sales.



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This is particularly important seeing as volume sales in beer are critical for retailers in helping increase footfall and penetration.”

When looking at the current beer market, it’s clear that the lager category is still full of innovation, which is why it remains so popular, says Kevin Fawell, UK sales director at Molson Coors Beverage Company. “There are a number of well-established brands and it continues to expand, with more options to excite consumers. This diversity is a key part of what makes the category so appealing,” he notes.

In particular, he points to the significant opportunity presented by the world beer market, which now accounts for more than one-third (36%) of total lager sales in the off-trade, up from 32% three years ago⁸. The

company’s Madri Excepcional brand more than doubled its retail sales value in 2023 to surpass the £100m mark⁹, he reveals, while sales of the brand increased more than 50%¹⁰ in the last 12 weeks of the year.

“Meanwhile Staropramen continues to grow in value in retail, and we’ve continued to invest in the brand in 2024, including a new multipack design which hit shelves at the beginning of the year.”

In other activity, the company recently launched Sharp’s Offshore Pilsner into the off-trade, with the brand rolling out across retailers at the end of April. “Offshore has become the UK’s best-selling discovery lager in the south west in the on-trade¹¹, and we expect this popularity to be reflected in the off-trade,” he notes.

The premium ale segment has come

under pressure in all sectors of the retail market in the last 12 months, driven by fewer shoppers buying into the category, says Charlie Johnston, head of off trade for St Austell Brewery. Year-on-year volumes have fallen by -10%, which, despite inflation, has resulted in overall value declining by -1%¹²,” he reveals.

“However, our brands are continuing to outperform the market; Proper Job claimed top spot as the No.1 IPA in the premium ales category last year, delivering an incremental £1.05m of value sales vs 2022¹³. Tribute also had a fantastic year and was the best-performing brand across premium ale in 2023, notching up an additional £1.8m in value sales vs 2022¹⁴.”

Meanwhile, for world beer, volume has grown by 1.6% over the last year, ahead of total beer at -2.9%¹⁵, he adds.

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“It is now the biggest segment by value in beer, providing growth opportunities for our lager brand, korev¹⁶.”

Cider: signs of a return to growth

While total beers, wines and spirits remain in decline (-4.6% MAT and -2.3% in the last 12 weeks), cider is down -3.5% in the last 12 weeks, just behind lager at -1.7%¹⁷, says Aston Manor Cider head of marketing Calli O’Brien. “However, grocery multiples (-1.5%) are growing in the last 12 weeks, while other channels continue to see sales decline, with independents taking the worst hit (-19.9%) as are discounters (-9.5%)¹⁸,” she says.

“As food price inflation continues to fall, shoppers will continue to be cautious with their spend in the coming months as their total outgoings continue to be under pressure, especially as bills rise elsewhere across TV, broadband, car insurance and water,” she notes. “Premium ciders, like our Knights Vintage, have seen a rise (+0.4%) in the last 12 weeks whereas by comparison, mainstream ciders have seen a decline (-14%) over the same period¹⁹.”

“Like premiums, value cider has also seen a slight increase (+0.6%) over the past 12 weeks²⁰, with Crumpton Oaks retaining its title as the No. 1 value cider brand in the impulse channel (+57% over the past 12 weeks)²¹.”

The cider category is worth £1.1bn, sitting at £689m in grocery and £394m in convenience²² and presenting retailers with an excellent opportunity to tap into the segment this year, says Heineken’s Wilson. “Heineken UK’s share in the cider category sits at 27.8%²³,” he adds, noting that the company’s Strongbow Original, Strongbow Dark Fruit and Inch’s brands have strong brand recognition and a loyal customer base.

It’s an exciting time for the cider market, with sales value growing faster than beer²⁴, says Jon Nixon, commercial director at Thatchers Cider. “At Thatchers we’re achieving market-leading growth and preparing for a significant uplift as consumers choose us as their go-to brand when warm weather arrives and summer sporting fixtures begin,” he says. “Premiumisation remains key and customers are willing to pay more for a better experience. As a result, Thatchers Gold now tops the charts in



both four- and 10-pack formats across the major multiples²⁵.

“Thatchers Vintage has become the fastest-growing premium cider brand in the category, increasing value by nearly 60% in the first quarter of 2024²⁶,” he adds. “The SKU has been in growth since it was given a new look and higher ABV in 2023 to reflect its premium position and appeal to vintage cider connoisseurs.”

At Molson Coors, Fawell agrees that there is a trend towards trading up in ciders when socialising at home. This, he says, is demonstrated by the ongoing growth²⁷ of Aspell Cyder, the No.1 super-premium cider in GB²⁸.

Meanwhile, Brothers Drinks Company is reaffirming confidence in flavoured ciders, despite acknowledging that “all sectors of the beer and cider category experienced strong headwinds over the past year with continued inflationary impacts and consumer confidence being

somewhat uncertain”, says head of marketing Nicola Randall. “The flavoured cider category is now well enough established to ride out these factors,” she says. “At an earlier stage in the category’s development, such forces might have had long-term effects, but flavoured cider is now an important part of drinkers’ repertoires, so while headwinds certainly affect the flavoured cider category, they don’t determine it.”

That said, she agrees that what you wouldn’t want at this time is “a totally fad brand” as market factors could “kill you off before you’d started. “Consumers are favouring established brands, while those with no genuine foundation – launched on a whim to ride the wave of some gimmick – are the most at risk,” she notes. “The four Showerings siblings behind Brothers Cider are 14th-generation cider-makers so, while never complacent, we are quietly confident for the future.”



£5.5bn

**Total value of the UK
beer market³**

Nielsen IQ

36%

**The share of the world
beer market in total off-
trade lager sales⁸**

Circana GB

£1.1bn

**Value of the cider
category, with £689m in
grocery and £394m in
convenience²²**

Nielsen IQ

Reward and distraction

The cost-of-living crisis has undoubtedly influenced all food and drink categories in retail, says Heineken's Wilson. "However, while premium beer has had a slight decline, it is still gaining overall share within beer, as is premium apple cider," he says. "While people may be spending less in general and cutting down on large expenditures, such as holidays, they are still indulging in smaller luxuries such as premium alcohol, and it remains one area where they are still happy to spend a little more and, maybe, trade up. As such, retailers would benefit in taking advantage of this and dedicating ample shelf space to premium brands, including Old Mout and Birra Moretti. We have also identified key opportunities in heritage and premium berry-flavoured ciders, and both segments are also still attractive from a price perspective."

"Premiumisation remains a key

factor for consumers within the ale category, with no sign of shoppers trading down," agrees St Austell's Johnston. "This is evidenced by the fact that standard ale is declining in volume at a faster rate than premium ale (-14% vs -10%)²⁹.

At Brothers Drinks, Randall says consumers are unquestionably under continuing financial pressure. "But they do seek products that reward and distract from day-to-day concerns," she says. "As a brand with a centre of gravity very much in take-home rather than the on-trade, we've been largely shielded from the downturn in spending on pub nights out – in fact, an upturn in spending at home plays to our strengths and we expect this to increase further over the warmer months with summer socialising at home.

Randall notes that upward price pressures are an inescapable market factor at the moment, but adds: "Manufacturers do have some levers

to pull to mitigate impacts on the end consumer. Total cash outlay is a key factor for shoppers so all flavours in our newly relaunched range are offered as single 500ml cans and 330ml cans in both single and six-pack formats.

"Recognising that flavoured cider is hardly one of life's essentials, we have to offer formats that best suit the cider consumer and meet their needs."

Moderation in mind

With alcohol duty changes in the market implemented in August last year, some companies may consider reformulating their brands to below 3.5% ABV to enjoy a reduction in duty. This, coupled with the growing popularity of low/no options, as consumers prioritise their health and wellbeing, has continued to see the low/no alcohol sector flourish.

In 2023, Molson Coors added two new zero-alcohol options to its UK portfolio: a reformulated Cobra

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Zero with an improved flavour to match the taste of the original Cobra lager; and Staropramen o.o. “This is a segment we only expect to grow as the trend towards moderation continues,” says Fawell. “Our broad range [also including Doom Bar Zero and Rekorderlig Alcohol Free] means we’re well placed to attract new consumers and help retailers tap into the opportunities it brings.”

Heineken UK recently launched Foster’s Proper Shandy, which has an ABV of 3%. Wilson says this introduction, marks the first innovation within the classic lager category for decades, aiming to reignite it and encourage exploration from consumers. “The 3% ABV sector caters to the two-fifths (40%) of adults who say they want to moderate their drinking³⁰, providing an option for low-tempo, relaxed socialising and unwinding occasions,” he adds.

At St Austell, Johnston says the company’s core brands have not altered their ABV following the duty changes. “Each of our core brands has a loyal following, with consumers loving the existing taste,” he says. “This is something we are very aware of and keen to preserve. We have recently launched Cornish Best into the 3.4% ABV area of the market and we’re seeing some encouraging results, with further new product development being explored throughout 2024 and beyond.

“We know the low/no category is a strong and growing market, so we’re excited to say we’ll be unveiling a new product in this space in 2024,” he reveals. “Currently the low/no category is dominated by lager – accounting for 64% of total low/no volume over the last year³¹ – and we see Proper Job, the best-selling IPA in premium ale, as the ideal brand to launch [in this sector] with, giving ale drinkers a fantastic alternative to the current lager options.”

In terms of ciders, one report reveals that low/no options have seen continued growth, with spend up by £2.4m (+8.4%), driven by new shoppers and purchase frequency³².

As the low/no category continues to grow, it has become essential for retailers to stock a quality alcohol-free cider, notes Thatchers’ Nixon. “Thatchers Zero is the No.1 alcohol-free apple cider³³ and is fast becoming a fridge staple. The brand new 4-can



pack is already stocked in over 1,000 outlets and reflects the increasing demand for the product.”

Mindful consumption is shaping trends in the cider category and low- and no-alcohol options, such as Old Mout o.o, available in Pineapple & Raspberry and Berries & Cherries flavours, is helping to drive this, says Heineken’s Wilson.

“We also know that drinks with an ABV of 3.4% or less are continuing to gain traction, and brands who focus on this area will be well-placed to help retailers cater to those consumers who are looking to moderate,” he adds. “We believe this trend for moderation is here to stay and will only continue to grow in 2024 and beyond. More brewers and brands are investing in the category and launching products at a lower ABV, which is exciting for the industry and creates greater choice for consumers.”

At Brothers Drinks, Randall says the company has reformulated this year

but notes that this was as part of its biggest-ever brand relaunch rather than any direct result of duty factors. Three or four of its cider products are offered at the new level of 3.4% ABV, “to match the brand’s positioning – targeting consumers seeking refreshing, sessionable fruit-flavoured ciders”, she notes. The company has moved ABVs both downwards and upwards to offer consumers the optimum range and meet evolving category needs, with its new apple and pear variant at 7% ABV, she adds.

Is the trend for flavours over?

One recent report suggests that the blossoming trend for flavoured ciders over the past few years is slowing down, with consumers returning to classic apple ciders and a greater focus on specific apple varieties³⁴. Apple cider accounts for 64.1% of the category and is winning share from flavoured cider, at 31.5%³⁵, it says.

Social media: 'oxygen for brands'

In a competitive and fast-moving fmcg market, it is impossible to ignore the need to embrace social media as a key weapon in any brand's marketing armoury.

As a recent article on LinkedIn* highlighted: "The influence of food and beverage videos on social media ... has a profound impact on social behaviour, culinary trends and even the food industry itself."

However, as the article also points out, authenticity is a key factor and consumers are more likely to respond positively to influencers who endorse products they genuinely believe in.

Brothers Drinks'

head of marketing Nicola Randall agrees, saying: "Nowadays, social media is like oxygen for brands. It's vital to have a strong social media presence in order to effectively engage audiences. We've enrolled key media influencers to create content about our brand for their 2.3m followers and we're also utilising paid advertising on Facebook and Instagram to reach 12m consumers across the summer. In addition, collaborative social media activity around our programme of 100 festivals nationwide, including competition for event tickets will reach a further 1.3m people.

For its flagship lager brand, korev, St Austell Brewery partners with influencers followed by its target drinkers to collaborate on campaigns, particularly with a love of outdoor adventure, reveals head of off trade Charlie Johnston. "This means we are able to amplify korev nationally to our core audience across our social media platforms, particularly Instagram," he says.

"We also run sponsored collaborative retailer social media posts, which are going live throughout the summer, targeting korev stockist regions and our core demographic."

In terms of in-store methods, the company has stand-out display units and aisle fins to drive awareness.

Meanwhile, following the launch of its rebranded Proper Job IPA, with new look bottles and can packs in supermarkets, the company is also running vibrant, retailer-specific display units to highlight the rebrand. In addition, it has a second phase of outdoor advertising running across the summer in the south west and southern regions, with billboards showcasing a continuation of its creative campaign: 'If you're going to do a job, do a Proper Job'.

"While the cider market is generally performing similarly to BWS, it's worth noting that flavoured cider is down (-13%) and declining ahead of the total market³⁶," says Aston Manor's O'Brien. "This suggests that drinkers are moving away from flavoured ciders in favour of more traditional recipes."

However, Brothers' Randall counters that fruit flavoured ciders are still very much an integral part of the category and important to consumers. "The fruit flavoured segment is maturing, and our research reveals that consumers are motivated nowadays by sessionable, easy-drinking flavours; they are seeking recognisable flavours and combinations that really deliver refreshment," she says. "This all marks something of a change from the segment's earlier years, when consumers were starstruck by novelty flavours or the next unusual combination. Apple remains important, but flavours incorporating berries and/

or citrus are the key ones to watch over the next few years."

Apple cider remains the most popular choice for consumers, says Thatchers' Nixon, but adds that the company has had huge success with its latest NPD. Its Blood Orange Cider was the biggest BWS launch of 2022³⁷, he says, while its latest innovation, Apple & Blackcurrant is "already in a top five fruit cider slot after only 12 weeks of being released³⁸."

At Heineken, Wilson contends that apple cider is growing ahead of flavoured cider, with premium options doing exceptionally well "even in times of economic hardship, when people don't have as much disposable income to hand". "This should signal to retailers that, despite customers cutting corners in other categories, cider is potentially where they are willing to trade up," he says.

However, innovation across the market is still predominantly coming from flavoured ciders, designed to drive

penetration among younger consumers – and this has pushed excitement back into the category, he adds.

Molson Coors' Fawell says that fruit ciders remain popular, particularly as consumers look for something fruity and refreshing during the warmer weather. "Data suggest that spirits and cocktail drinkers are increasingly turning to fruit ciders³⁹, so there is an opportunity to grow sales by attracting both fruit cider lovers and a new range of consumers with exciting new flavours," he notes.

"There is still definitely a demand for new flavours in the category, he adds. "Earlier this year, Rekorderlig rolled out a category-first Peach-Raspberry flavour, combining peach – which has been named flavour of the year by DSM Firmenich⁴⁰ – with a hint of raspberry to provide a refreshingly lighter taste without too much sweetness, which is the main barrier to consumers buying fruit ciders⁴¹."

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Alongside this flavour, Rekorderlig has also introduced Blackberry-Blackcurrant, which Fawell believes will be “a big boost to the dark fruit category, which is a popular choice all year round”. Both flavours are available in 500ml bottles and the Peach-Raspberry variant will also be available in 10 x 330ml can-packs.

The company also unveiled a new super-premium cider in a 330ml can – Aspoll Crisp Apple Cyder. With a lower ABV than the rest of the Aspoll range in the off-trade (at 4.5%), it fills a gap in the market for a super-premium canned cider, despite the fact that can formats currently make up two-thirds (67%) of cider sales⁴². “Early consumer research show the product appeals to both existing cider drinkers and consumers who would usually drink RTD cocktails⁴³,” he reveals.

The promise of summer

Seasonality and temperature are key drivers in beer and cider consumption and the category is looking forward to a summer packed with sporting events, offering ripe opportunities for increased off-trade sales.

Thatchers’ Nixon says the company is excited for a jam-packed summer of sport and is investing in a large-scale advertising campaign, created in partnership with the Aardman animation studio. The next chapters in its Aardman ads will celebrate the skill of national sporting teams – and that of cider makers, with the puppets of the Thatcher family trying their hands at football and cricket ahead of the UEFA Euro 2024 and Vitality Blast tournaments. The adverts will run throughout the summer, reaching an audience of 45 million people, he says.

In addition, Thatchers will be popping up at festivals and events throughout the summer, reaching a further 270,000 people through live activations and will be giving away one million samples this year.

Johnston says St Austell Brewery will be promoting its 4x440ml korev can pack and 12 x 330ml korev bottle packs, which are “perfect for the group in-home drinking occasion, whether that is during the Euros or summer BBQs”. The company will also be running rate of sale purchase-necessary headline promotions across the on and off trade during eight weeks on its 4 x 440ml korev



can packs.

The company has a long-standing partnership with Surfing England, so he says it will be able to connect with affiliated clubs during the summer, particularly when people are tuning into the Paris Olympics.

Big events are always a big opportunity for retailers, says Molson Coors’ Fawell. “With a busy schedule of sports this summer, there are opportunities to drive sales across a host of different categories – not only alcohol but things like snacks and meal-matching that lend themselves more naturally to sharing occasions. Bringing these categories together in themed displays can be an effective way to drive incremental sales.

2024 is set to be a massive year for sport, agrees Heineken’s Wilson. Heineken is the official beer sponsor of the UEFA Champions League (UCL), UEFA Women’s Champions League (UWCL), Investec Champions Cup and Formula 1 Qatar Airways British Grand Prix. As such it will offer limited-edition UEFA-themed packaging and glassware across all Heineken Original packs, celebrating the brand’s sponsorship the UCL and UWCL and featuring the trophies of both tournaments this spring and summer.

In addition, limited-edition racing-themed Heineken 0.0 x F1 packs focus on the brand’s exclusive global partnership with Formula 1.

The limited-edition sport packaging



mill in Shepton Mallet,” she says. The brand will continue again this year as the Official Cider of Glastonbury Festival, as well as being Official Cider of Sundown Festival in Norfolk, Blackheath’s Kisstory/Uptown Festival, Bristol’s Harbour Festival and Love Saves the Day. The company will attend these events with its interactive Brothers Cider Fun House, complete with a series of interconnected rooms, multiple Instagram-friendly photo opportunities and a colourful and fruit-inspired themed bar.

Future forecast

While inflation is coming down, St Austell’s Johnston says he anticipates budgets will still be tight, with consumers spending less often, but continuing to spend on premium, high-quality products when they do. “The low/no and stout areas of the category will continue to grow and gain share, winning new consumers, particularly among the younger generations of drinkers,” he predicts. “Within premium ale, we have seen a shift away from single bottles into small and mid-packs as consumers look to the category to serve different consumption occasions. Purchasing bigger packs also results in consumers having to shop less often while also benefiting from the ‘bigger pack, better value’ cost saving. This helps consumers manage budgets and is undoubtedly a trend we’ll continue to see over the next 12 months.”

Alcohol moderation will continue to play a notable role, with acceptance of low/no variants now the norm, says Brothers Drinks’ Randall. “Importantly, the machismo associated with higher-ABV products is almost a thing of the past and consumers are happy to drink – and be seen to drink – what might traditionally have been considered lower-ABV products. For consumers, taste is king; if a product tastes good, then it’s accepted,” she says.

However, financial restraints will mean that consumers still relish night in pubs and bars, but these will become less frequent and consumers will attempt to recreate the on-trade experience at home. “Drinks, food, taxis, baby-sitters – these quickly add up and more and more consumers will weigh the full cost of a night out versus the cost of a night in,” she observes.

Finally, Randall points to canned

products as evermore important to consumers. “Aside from the usual benefits – weight, portability, non-breakable, quick and easy to chill – cans are now more widely accepted as premium offerings and this, in large, is thanks to craft beer’s pioneering work over recent years. But a significant overlay to cans’ functional benefits is that consumers increasingly appreciate their advantageous recyclability.”

As tastes change and evolve, more consumers – across all demographics – are keen to explore new styles of beer, including a growing interest in world lagers, concludes Heineken UK’s Wilson. “This is where innovation from familiar brands comes into play as people are gravitating towards NPD from brands they are familiar with – such as Birra Moretti’s new Sale di Mare variant. While classic lager remains a core category for retailers to focus on, and drives purchase, introducing new sub-brands into the mix presents a clear trading-up opportunity, especially as we venture into the warmer months.

“In fact, research has identified an opportunity to offer ‘curious drinkers’ seeking more flavourful and interesting taste profiles, with an option that offers an accessible premium twist⁴⁴.”

Sources

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- ³⁸ Circana, Cider & Perry, Fruit Value, 12 wks to 20.04.24
- ³⁹ CGA, Cost of Living Pulse Survey, October 2023
- ⁴⁰ <https://www.firmenich.com/taste-and-beyond/flavor-year-2024-peach>
- ⁴¹ Drivers and Barriers Survey, December 2022
- ⁴² IRI All Outlets, Volume, 52 w/e 02.12.23
- ⁴³ Nielsen, BASES volumetric testing, Aspell CAN – ‘63% of people that would usually drink RTD cocktails say they would definitely or probably purchase Aspell Crisp Apple Cyder’
- ⁴⁴ Heineken UK, qualitative research

Social media

* <https://tinyurl.com/2hnc98cs>

and glassware will be available to grocery, wholesale and convenience retailers immediately and up to July 2024.

During major international sporting events, retailers can amplify their beer range by offering larger multipacks in anticipation of people hosting gatherings at home alongside small packs sited in the fridge for those wanting to grab something convenient to enjoy on-the-go, adds Wilson.

Sport aside, the other big summer interest where Brothers Drinks can capitalise is festivals, says Randall. “Festivals are in our DNA and it’s 29 years since Brothers Cider debuted at the world-famous Glastonbury Festival, located just three miles from our cider

Aston Manor Cider

Affordably versatile

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KEY BRANDS

Crumpton Oaks
Frosty Jack's
Knights

↙ Aston Manor Cider's ethos is all around affordability, says Calli O'Brien, head of marketing at the company. "Our range provides shoppers with an affordable, great-tasting solution, so they can be assured they are not compromising when needing to spend a little less cash on cider," she says.

Building on the success of Aston Manor's extensive range of world-class ciders, Knights Cider is now the UK's No.1 strong amber cider brand¹, recording over 12 million cans sold annually², and with a 54% increase in shopper numbers year-on-year³. To put this achievement into context, it comes at a time when total cider sales have declined by -7%, notes O'Brien.

Crumpton Oaks retains its title as the No.1 value cider brand in the impulse channel, seeing continued success and growth (+57%) over the past 12 weeks, while the total category was down -3%⁴. The brand offers shoppers great value for money with its 4-pint cans at an RRP of £4.99. "Made from bittersweet apples blended with the juice from crisp dessert apples to achieve a mighty refreshing taste, Crumpton Oaks achieved silver at the World Cider Awards, as its bold flavour profile has generated strong consumer appeal; so by stocking the brand, retailers can expect to see an uplift in their sales," says O'Brien. "Crumpton Oaks is also 5% ABV, making it a preferred choice for retailers whose sales may be restricted due to high strength laws."

With rising food and drink prices the top concern for almost half (49%) of shoppers⁵, Aston Manor Cider has introduced a new range of Frosty Jack's pack formats to help provide shoppers with better value without trading down on quality. "Frosty Jack's RRSP range includes a 1L bottle, a 1.5L bottle and a larger 2.5L offering, further strengthening the brand's reputation. The new range offers something for every shopper's budget," adds O'Brien.

Newly launched in Tesco during February this year was the company's Knights Vintage Cider 500ml glass bottle. "The brand has been crafted by our master cider maker from a blend



“Our range provides shoppers with an affordable, great-tasting solution, so they are not compromising when having to spend less”



of the finest bittersweet apples," she says. "With an 8.4% ABV, this cider embodies the expertise that defines Herefordshire's cider-making legacy, with its simplicity and accessibility.

Brand awareness will be driven this year with trade advertising and a burst of distribution drives, visiting retailers and placing POS in stores, to really disrupt shoppers at point of purchase.

The company's campaign 'Straight Outta Crumpton' returns to the screen for the third year running, in the form of VOD, OOH & social advertising. This play on N.W.A's 'Straight Outta Compton' hit brings to life the world of cider through the lens of hip-hop, from break dancers and low riders to golden mouth grills, and DJ decks. It will appear on screens from May until July.

For Frosty Jack, a nationwide shopper campaign will offer shoppers the chance to win one of 10,000 branded ice cube trays when they purchase any bottle or can over the summer period.

2024 will also see the return of Frosty Jack's successful Hans Handerson campaign on both VOD and OOH later this summer. Encouraging customers to 'Crack Open the Unexpected', the tongue-in-cheek advert injects fun and personality into the cider category with the world's 'most famous' Z-list celebrity hands model – Hans Handerson.

Source

- ¹ Nielsen, Total Cider Market to 02.12.23
- ² Aston Manor Sales Report to 31.12.23
- ³ Kantar, 52 wks to 24.12.23
- ⁴ Nielsen, Volume (HLs), GB Grocery Multis, Value, to 13.04.24
- ⁵ Levercliff Consumer Tracking Survey, Q1 2023

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be drinkaware.co.uk *Source: Nielsen Cider Panel UK Total GB 52 wks WE end 13 Aug 22.

Brothers Drinks Co

Revitalising flavoured cider

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Brothers Cider
Compton Orchard
Babycham

“Brothers Cider has undergone its biggest-ever relaunch this year and, supporting our plan to reignite the flavoured cider category, we’re matching the scale of the relaunch with our biggest-ever marketing package,” explains Nicola Randall, head of marketing at Brothers Drinks Company.

“We launched the UK’s first-ever flavoured cider in the 1990s and have a successful record in regularly introducing quirky variants to the category, but we’re now focusing on four permanent flavours. With flavoured cider now well established as a sub-category, consumers are looking for great-tasting products that they can stick with through an evening or event, as opposed to having one flavoured cider and then moving on to something else due to sweetness or ABV. Consumers want sessionability and refreshment and our all-new range delivers both.

“Our line-up of recognisable flavours, presented in enticing new combinations, captures the need for familiar, appealing, refreshing products. To accompany, a transformative pack redesign playfully communicates the brand’s free-spirited personality. The bold, disruptive look breaks category norms, using illustrations and vibrant real fruit depictions on premium white cans. Mirroring consumer preferences and environmental benefits, our new variants are available in cans only, sold as single 500ml regular cans, single 330ml sleek-style cans and 6 x 330ml multipacks.”

With listings in Tesco, Morrisons and Asda, the new line-up has hit the ground running.

Born at Glastonbury Festival

“The roots of the Brothers brand are in the festival fields of Somerset,” states Randall. “We trace our beginnings back to being first sold in 1995 at Glastonbury Festival, just three miles from our cider mill. The association with the world-famous gathering has thrived over three decades and we’re proud to continue as the Official Cider of Glastonbury Festival.”



“Our line-up of recognisable flavours, presented in enticing new combinations, captures the need for familiar, refreshing products”

Mud, music and mates

“Festivals are in our DNA so it’s apt that Brothers is centre-stage in its own festival-themed advertising campaign this summer,” adds Randall. Employing the strapline ‘Always Look on the Brothers Cider Life’, the campaign draws on Brothers’ festival roots, giving a light-hearted insight into the new positioning as ‘seriously unserious cider’.

The ads show Brothers Cider creating brightness, whatever the weather – in spite of anything a British outdoor event can challenge tented festival-goers with, Brothers still delivers the best of times with mates.

Running throughout the summer, the £4m push comprises video-on-demand TV advertising, nationwide 6-sheet posters, consumer PR, and a major social media campaign.

Generation gain

The four siblings behind Brothers Cider are 14th-generation cider-makers; they know how to create exceptional quality products but also understand the importance of being contemporary and meeting the needs of today’s drinkers.

“This relaunch year sees our biggest-ever programme of over 100 nationwide festival collaborations and an ad campaign centred around festival life – both showcase Brothers Cider in its natural habitat: the outdoor summer festival,” concludes Randall.





Reigniting the cider category!

- £4m marketing investment
- Revamped packaging and formats
- All-new refreshing natural flavours



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Strongbow
Inch's
Old Mout
Heineken®
Heineken® O.O
Cruzcampo®
Foster's
Birra Moretti

➔ Heineken UK's share in the cider category sits at an impressive 27.8%¹ and, come summertime, there is ample opportunity for retailers to capitalise by stocking up on best-selling cider brands, including Strongbow, Old Mout and Inch's, all of which have strong brand recognition and a loyal customer base, says category & commercial strategy director Alexander Wilson.

These brands offer customers a range of flavours to explore, he notes. "This is important because cider drinkers are more likely to buy into the category when tempted by innovation, and the appeal of a new flavour from their favourite brand," he says.

Driving category visibility

To celebrate the upcoming summer of cider, Heineken UK is launching its Cider Festival activation, available to selected retailers. Wilson explains that it will encourage consumers to shop from its portfolio of apple and fruit ciders through a multi-category approach. "The activations are aimed to drive visibility for the category and trial with standout execution and sampling in-store," he says.

Zesty approach for Strongbow

When it comes to best-selling brands, Strongbow commands a 21% market share in the total cider category, being the No.1 cider brand in the total market in volume and value sales², reveals Wilson.

"Earlier this year, we launched Strongbow Zest to offer more choice and to help recruit new consumers into the cider category, particularly those who are on the hunt for fresh innovation and new flavour experiences. Strongbow Zest is an apple cider blended with lime, lemon and orange flavours, and contains no artificial flavours, sweeteners, or colours, and is suitable for vegan diets, being gluten-free.

"The launch comes on the back of Strongbow Tropical, which was crowned Product of the Year and the No.1 cider innovation in 2023³, he adds. "As such, we know there is an appetite for new flavours in the category, and we



“Come summertime, there is ample opportunity for retailers to capitalise by stocking up on best-selling cider brands”



recommend retailers stock up now to take advantage of summer sales.”

Premium ciders for smaller luxuries

Meanwhile, retailers ought to also pay attention to premium cider brands in the summer – as while people may be spending less in general and cutting down on large expenditures, such as holidays, they are still indulging in smaller luxuries, notes Wilson.

"As such, we suggest retailers take advantage of this and dedicate sufficient shelf space to premium ciders, such as Old Mout, and more mainstream lines like Inch's," he advises. "We have also identified key opportunities in heritage and premium berry ciders, and both segments are also attractive from a price perspective.

"Inch's is the apple cider brand that grew the most share in the off trade in 2023⁴ – a clear sign that shoppers are looking for quality as well as accessible pricing options to help. A mix of mainstream and premium will help stores encourage purchases, and facilitate trade-up and a bigger basket spend overall.”

Source

¹ NielsenIQ: Full Year 2023 total coverage including discounters

^{2,3} Nielsen Scantrack YTD – 29.02.24

⁴ NielsenIQ: Full Year 2023 total coverage including discounters

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*NielsenIQ: Full Year 2023 total coverage including discounters (HEINEKEN UK's share in the cider category is 27.8%)



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Heineken®
Heineken® 0.0
Cruzcampo®
Foster's
Old Mout
Birra Moretti
Strongbow

Over the past year, Heineken UK has launched a range of innovative and exciting products and campaigns, with the latest activity shining a light on Spain's No.1 draught lager brand Cruzcampo⁴, reveals Grace Daley, senior brand manager for Cruzcampo.

“Cruzcampo was launched into the UK off trade in August 2023 in response to the increased demand for Spanish lager and has since performed exceptionally well,” she says. “It was the off-trade’s No.1 innovation in the beer, wine and spirits category during the 12-week Christmas period in 2023² and is now the 14th-largest draught brand³. It was also officially the biggest brand launch in value in over a decade in the beer, wine and spirits category⁴, cementing itself as a must-stock brand for retailers looking to get ahead of trends and tap into new demographics.”

‘Choose to Cruz’ campaign

With significant investment set to ramp up demand for the brand in the off trade, ‘Choose to Cruz’ will further emphasise the brand’s Spanish heritage, tapping into the demand for Mediterranean styles this summer, while also speaking to the more relaxed and spontaneous drinking occasions that Cruzcampo is well suited to, reveals Daley. Live until July 2024, the £10m campaign will appear across TV, VOD, OOH, radio, digital audio and social media, alongside influencer activity.

“The investment behind Cruzcampo comes at the time when more



“The investment behind Cruzcampo comes at a time when more consumers are looking for new styles of beer to try – especially continental lagers with a Spanish twist”

consumers are looking for new styles of beer to try – especially continental lagers with a Spanish twist, appealing to those seeking a great quality, authentic experience at an accessible price point,” she says. “Cruzcampo effortlessly offers an affordable trade-up option for lager drinkers who enjoy discovering new experiences, and an authentic and well-loved Spanish brand.”

Retail advice

Having a fully stocked display with a good mix of core brands, such as Heineken and Birra Moretti, immersed with new trending lines like Cruzcampo, is the best way retailers can retain loyal customers, as well as attract new shoppers to explore the beer category for the first time; during the warmer months, people will be looking to recreate holiday moments at home, says Daley.

“This is particularly important seeing as volume sales in beer are critical in helping drive footfall and penetration,” she notes. “So stocking brands like Cruzcampo will help achieve this, especially as we know that the beer category is being primarily driven by an increased interest in new formats, innovation and styles, worth a huge £3.6bn in the grocery channel⁵.”



Source

- Nielsen Spain data, MAT to Oct 2023
- Nielsen, Off Trade, 12 weeks to 30.12.23 vs same period year ago
- CGA OPM, Data to L12W P02 2024 (24.02.24)
- Biggest brand launch since 2007 based on Value (£) in its first year of launch –CGA OPM Data to P02 2024 (24.02.24); Nielsen Discover Data to 23.03.24
- Nielsen IQ, FY 2023

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KEY BRANDS

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Madrí Excepcional
Coors
Staropramen
Aspall Cyder
Sharp's Doom Bar
Sharp's Atlantic Pale Ale
Sharp's Offshore Pilsner
Rekorderlig
Cobra
Pravha
Blue Moon

As summer approaches, friends and families across the country will be celebrating the arrival of warmer weather, with family gatherings, summer BBQs and picnics. This marks the start of a busy time for retailers, too, with plenty of opportunities for strong sales, says Kevin Fawell, UK sales director at Molson Coors Beverage Company.

“As anyone who has hosted a large gathering will know, it’s a struggle to find something to please everyone, and people often find themselves buying a wide range of items to cater to different tastes,” he says. “For retailers looking to make sure their beer and cider range offers a broad selection this summer, the category is full of choice to help them deliver on this, while clear trends are also emerging to capitalise on.”

World lagers

Consumers are continuing to trade up when socialising at home, evidenced by the ongoing growth of world lagers, which now account for 36% of total lager sales in the off-trade, up from 32% three years ago¹, reveals Fawell. “Madrí Excepcional is a prime example,” he notes. “It more than doubled its retail sales value in 2023 to surpass the £100m mark², establishing itself as a must-have in any alcohol line-up.

“The world lager category is also very diverse. For example, pilsners like Staropramen or the recently-launched Sharp’s Offshore Pilsner offer a uniquely hoppy, malty taste for drinkers seeking something different.”

Cider season

Cider is synonymous with summer, and like the beer category, Molson Coors is seeing a shift towards more premium options at home, demonstrated by the ongoing growth in retail sales value³ of Aspall Cyder, the No.1 super-premium cider brand in Great Britain⁴, he adds.

“Earlier this year, Aspall unveiled a new super-premium cider in a 330ml can after identifying a gap in the market, helping the category grow its appeal,” he reveals. “Spirits and cocktail drinkers are also increasingly turning to fruit ciders⁵, so there’s an



“For retailers looking to make sure their beer and cider range offers a broad selection this summer, the category is full of choice to help them”



opportunity to grow sales via flavour innovation too – such as Rekorderlig’s category-first Peach-Raspberry flavour, which rolled out earlier this year.”

Core favourites

While premiumisation offers significant growth, trusted favourites remain key to delivering consistently strong sales, says Fawell. “That includes Carling, which remains the No.1 lager brand in Great Britain⁶ and, with its rich football heritage, is likely to be a popular choice during the summer sporting schedule.

“Coors is also a popular pick for consumers looking for a drink that offers a step up from core lagers. Its renowned refreshment will keep it front of mind for summer social occasions.

“When it comes to ale, Doom Bar – the biggest amber ale in Great Britain⁷ – is a crowd-pleaser, offering a balanced and accessible flavour with broad appeal.

“You can’t predict the weather, but offering variety and keeping these trends in mind will put you in pole position to succeed, come rain or shine.”

Source

- 1 Circana, GB All Outlets, value sales for 52 w/e 20.04.24
- 2 Circana, GB All Outlets, value sales for 52 wks to 23.03.24
- 3 Circana, GB Off Trade Value 52 w/e 23.03.24
- 4 Circana, GB Off Trade Volume and Value, 52 w/e 23.03.24/CGA GB data, Volume and Value sales 52 wks to 23.03.24
- 5 CGA, Cost of Living Pulse Survey Oct 2023
- 6 Circana, GB Off Trade Volume, 52 w/e 23.03.24/CGA GB data, Volume sales, 52 wks to 23.03.24
- 7 Circana GB Off Trade Volume and Value 52 w/e 23.03.24/CGA GB data, Volume and Value sales 52 wks to 23.03.24

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Laura McKay
Marketing Director

KEY BRANDS

Tribute ale
Proper Job IPA
korev

2023 was a strong year for St Austell Brewery in the off trade, reports the company's head of off trade Charlie Johnston. "korev, our flagship lager, outperformed nine of the top 10 world beer brands, with volume up 25% on 2022¹," he says. "The success of our korev rebrand in 2021 has seen the beer go from strength to strength and volumes grow by 47%. With its vibrant blue hues, the brand has real standout on-shelf, and resonates with an adventure-seeking, younger audience."

Earlier this year, St Austell Brewery took the decision to switch from a 6x330ml can size to a 4x440ml format. "The leading retailers across the UK have now made the switch to the new can size," says Johnston. "It's a format in huge growth, aligning better with the world beer market."

"korev is having a great 2024, outperforming the growing category of world beer, with volume up 11% (vs +5% for world)², so it made sense for us to move with the trends for the category and continue to explode the korev brand across the south west."

The company will also run a headline promotion on its 4x440ml korev can packs. "We're partnering with Much Better Adventures to offer £1,000 voucher prizes to be redeemed against outdoor getaways such as canoe expeditions, trail riding and mountain hiking," reveals Johnston. "Over 100 instant wins are available throughout the campaign, which will be supported with in-store point of sale and digital assets during eight weeks from July."



“korev is having a great 2024, outperforming the growing category of world beer². Meanwhile, Proper Job IPA's rebrand has landed well in-store, really standing out on-shelf”

"Our flagship ale, Proper Job IPA, has also had an amazing year. It claimed the top spot as the No.1 IPA in the premium ale category, delivering an incremental £1.05m in value sales vs 2022³."

Around two years ago, the company took the decision to rebrand Proper Job – its hop-forward IPA – which has been a firm favourite since its inception in 2006, says Johnston. "The beer market has moved on hugely in the last few years. Craft beer is in huge growth and we're looking to get those drinkers back into the ale category with this rebrand, which launched in March this year," he says. "It was great to get retailers involved in the brand's refreshed look; one of the major supermarkets visited the brewery in mid-April and was very complimentary about the rebrand, welcoming the innovation."

"The new Proper Job branding has also landed well in-store. Its bold green and white colouring really stands out on-shelf and appeals to a younger, more craft-driven demographic."

Another exciting innovation later this year is Proper Job 0.5%. "Currently, the low/no category is dominated by lager and we see Proper Job – the best-selling IPA in premium ale – as the ideal brand to launch with, giving ale drinkers a fantastic alternative to lager options in the category."



Source

¹ Circana Total Market, All Outlets, Volume Sales, 52 w/e 30.12.23 vs YA

² Circana, All Outlets volume, 12wks to 23.03.24 vs YA

³ Circana Total Market, All Outlets, Volume Sales, 52 w/e 30.12.23 vs YA

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KEY BRANDS

Thatchers
– Gold
– Haze
– Blood Orange
– Apple & Blackcurrant
– Rosé
– Katy
– Vintage
– Zero

↙ Cider is looking set for a great summer – warm weather, international sporting fixtures, festivals and exciting innovation within the sector are attracting new customers, says Jon Nixon, commercial director at Thatchers Cider. “Sales of cider rise as the warmer weather appears, with Thatchers seeing a significant uplift, so stores need to be ready for increased demand,” he notes.

Thatchers is the No.1 cider for value growth in the off trade¹, with its flagship brands, Thatchers Gold and Thatchers Haze, both in growth over the last 12 months², adds Nixon. “Gold tops the charts in both four- and 10-pack formats across the major mults³, and Haze is the No.1 cloudy apple cider⁴ in retail outlets, making them must-stocks for driving cash in the till,” he adds. “While the cost of living means people are watching their expenditure more carefully, they’re prioritising quality and are willing to pay for it.”

Aardman animation campaign

The Somerset family cider maker is investing in a multi-million campaign this summer, in partnership with multi-Academy Award®-winning studio Aardman, so Thatchers will be front of mind for customers, reveals Nixon. “This gives stores a great opportunity to capitalise by stocking up and putting Thatchers packs front and centre.

“What makes Thatchers extra special is that its ciders are as good for the environment as they taste in the glass. The family company has been working in partnership with nature for 120 years – from planting new orchards, to using regenerative farming methods,



Source

- ¹ Circana, Cider & Perry, Manufacturers, Value Sales, % change, 52 wks to 20.04.24
- ² Circana, Cider & Perry, Value, 52 wks to 20.04.24
- ³ Circana, Cider & Perry, Major Mults, Value, 4ct & 10ct, 52 wks to 20.04.24
- ⁴ See 2
- ⁵ Kantar Shopper Panel, 52 w/e 04.09.22
- ⁶ Circana, Cider & Perry, Supermarkets, Value, 52 wks to 20.04.24
- ⁷ Circana, Cider & Perry, Fruit, Value, 12W to 20.04.24



“What makes Thatchers extra special is that its ciders are as good for the environment as they taste in the glass”

enhancing biodiversity with wildflower areas, or even building a four-metre high, five-star hotel for nature in an acre of wildlife haven. Even the apple left over after pressing is recycled into green energy, and CO₂ created in the fermentation process is captured and used to add bubbles to the cider.”

New product development has been a huge success for Thatchers, he notes. “Blood Orange was the biggest launch in the BWS category in 2022⁵, growing the category, and is now the biggest fruit cider 4-pack in supermarkets over the last 52 weeks⁶. Now, Apple & Blackcurrant looks set to follow suit, taking a top five fruit cider spot just 12 weeks after launch⁷, with initial results indicating the flavour is recruiting new shoppers to the category.”

Apple cider remains the most popular choice for consumers, concludes Nixon. “When thinking about what to stock over the warmer months, Thatchers recommends 70% apple cider and 30% fruit cider to get the balance right.”

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