

The Grocer

Focus On: Beer & Cider by Simon Gwynn (simon.gwynn@thegrocer.co.uk)

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The Story

- **The growth in the overall beer & cider market we reported on a year ago was a blip, it seems. In the past 12 months the market has flattened. Cider has slipped into value and volume decline after several years' growth; ale and stout have been battered. Lager, surprisingly, is the only sector in growth, after several years' decline. What's driving these performances and what will it take to resurrect growth? Has cider's heyday now passed?**

Key themes:

Cider: This feature will explore the factors that have led to cider's decline after several years of growth. Particular attention will be paid to factors such as NPD, new listings, advertising, price and promotions. Has cider's heyday come to an end? What does the decline mean for farmers that have increased the size of their orchards in recent years to satisfy growing demand for cider apples?

Lager: This feature will explore the performance of this category in detail, investigating the factors that led to lager's relatively positive performance in the past year. Who are lager's best and worst performers? To what extent was lager's volume growth driven by promotions during the World Cup? Can its growth be sustained or is it just a blip?

Ale: This feature will analyse the performance of this category in detail. Particular attention will be paid to factors such as NPD, new listings, advertising, price and promotions. How are ale players looking to put the sector back in growth after the past year's disappointing performance? Who have been the heroes and casualties of the past year in ale?

'Craft': This feature will explore the continued growth of beer and ciders purporting to be 'craft' brands. What sort of growth is this part of the market seeing at present and how long can it be sustained? What do pioneers of the British craft movement make of recent efforts by multinational drinks companies to cash in on the trend with their own 'craft' offerings?

Price & promotions: This will be paid particularly close attention in this feature, given the decision of many major lager players to cut back on deal activity which they claimed was unsustainable a few of years ago. Have they managed to convince drinkers to pay more for their lager or have they had to resort again to piling high and selling cheap? How vital is it for brands to hit certain price points?

Off-trade v on-trade: Exclusive analysis for The Grocer suggests that more Brits are drinking in pubs and restaurants than they were a year ago, a factor that could be affecting the amount of beer and cider we're drinking at home. This feature will explore whether patterns of consumption are set to start swinging back in the on-trade's favour and how brands are looking to exploit this.

Innovation: This will be key to this feature. We will be investigating how new product development has shaped the category over the past year and what is in store for shoppers in 2015. We will be profiling 12 of the most interesting launches (four ciders; four lagers; four ales) in separate innovation panels.

Competition from other alcohol categories: This feature will explore whether the decline in beer and cider has been to the benefit of other alcohol sub sectors. Are Brits drinking wine, sparkling wine, spirits or cocktails at home instead of beer and cider? Which sub categories pose the greatest threat to beer and cider over the coming year?

Promotions: This feature will explore how the promotional strategies of retailers and brands have changed over the past year. Attention will be paid to the promotional strategies of retailers and how this has affected average prices over the past year.

Advertising and marketing: This feature will also investigate how the marketing and advertising strategies of the category's biggest brands have evolved over the past year and how they will develop in the coming year to sustain growth or return brands to growth.

Key questions the feature is likely to address:

- What consumer trends have impacted the category over the past year?
- How have promotional strategies (both in terms of price and marketing) evolved?
- How have individual retailers' strategies impacted the market?
- How has merchandising changed in the market?
- What impact has own-label had on branded players?
- What's next for the category?