THE NUMBER 1 PREMIUM BOTTLED ALE BREWER

MARSTON'S

Est 1834

# Premium Bottled Ale

## Market Report 2016

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MARSTON'S No.1 PREMIUM BOTTLED ALE BREWER

# INTRODUCTION

## WELCOME TO THE 2016 PREMIUM BOTTLED ALE (PBA) MARKET REPORT FROM MARSTON'S BEER COMPANY

As the largest brewer of PBA we take on the role of category ambassadors by producing this report annually with the purpose of driving sustainable long term growth for retailers, brewers and all others that contribute to the bottled ale category.

In a world where data is king and comes from many different sources, we take a very simple approach. For the hard hitting product sales numbers we use IRI to dig into the detail beneath the top line figures. We use Kantar panel data to show the who, where and why behind the category trends we uncover. Finally, to understand shopper and consumer perceptions and behaviour we commission Research By Design(RBD) to conduct a survey with over 1,000 consumers and shoppers.

Throughout this report we deliver actionable recommendations that are supported by the insight behind them. As they did last year these actions will provide sustainable and long term growth for those that implement them.

I hope you enjoy reading this year's report and find our recommendations and insight both interesting and relevant. Most importantly we hope it enables you to help maintain the growth of this unique high value category.

P. Warren

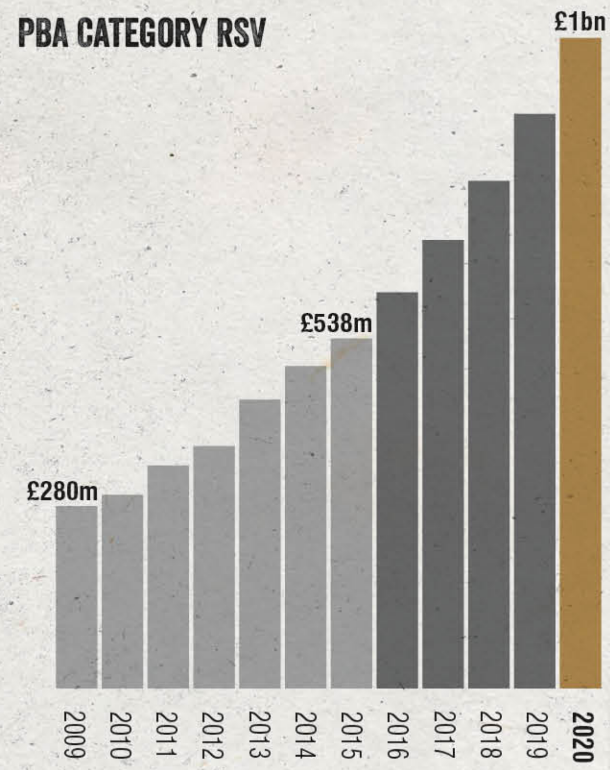
Paul Warren
Senior Category Manager

## TOP 10 BREWERS BY VALUE

| | MARKET SHARE | YOY VALUE CHANGE |
|---|---|---|
| Marston's | 18.0% | +9% |
| Greene King | 12.9% | +1% |
| Molson Coors | 6.6% | +50% |
| Hall & Woodhouse | 6.2% | -9% |
| Shepherd Neame | 5.8% | -12% |
| Fuller's | 4.6% | -9% |
| Heineken | 4.3% | -9% |
| Charles Wells | 4.1% | +4% |
| Brewdog | 3.6% | +119.2% |
| St Austell | 2.7% | +28.1% |

**Source:** IRI All Outlets 23 Apr 2016

# CATEGORY MISSION




**Source:** Using BBPA volume and IRI Avg. Price Data; 52 w/e to 2 Jan' 2016

## THE £1BN 2020 TARGET IS IN SIGHT WITH THE PREMIUM BOTTLED ALE CATEGORY GROWING OVER £48M IN 2015

Over the past 12 months the value of the total Off-Trade beer market has been flat while the On-Trade has continued to decline.

Over the past 6 years PBA has increased in value by +92%, adding £257m to the beer market. PBA volume growth has outstripped value growth this year due to competitive pricing in the larger retailers, but is still on its way to becoming a £1bn category by 2020.

Lager was contributing to the previous years' growth of the Off-Trade market but this year has declined by -0.7%, removing £20m of RSV from the beer category. Without the high value growth from PBA total Off-Trade beer would be in year on year decline.

The growth of PBA so far has only been achieved through the action of brewers and retailers satisfying consumer demands while making the shopper experience even more enjoyable.

**OVER THE PAST 6 YEARS PBA HAS INCREASED IN VALUE BY +92%, ADDING £257M TO THE BEER MARKET.**

## 2016 RECOMMENDATIONS

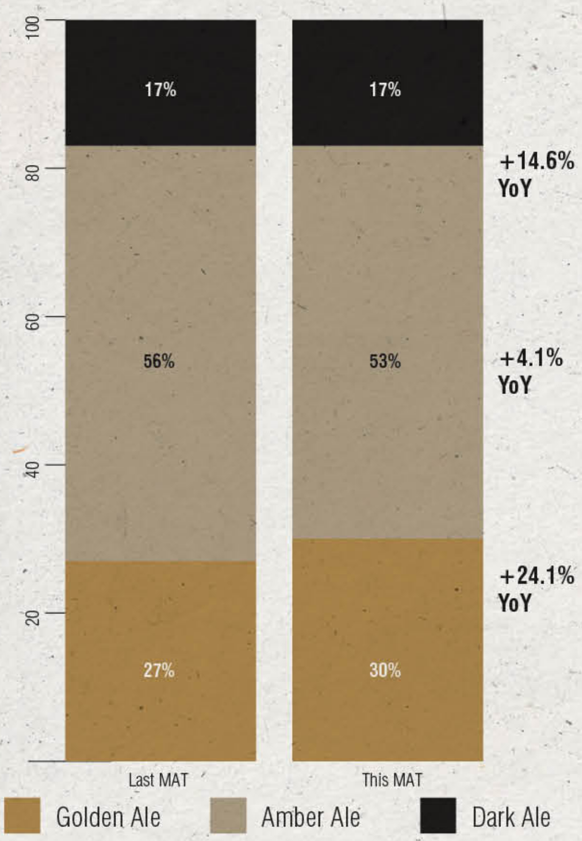
| | 2015 ACHIEVEMENT | REMAINING 2020 OPPORTUNITY |
|---|---|---|
| **1 SHOPPER ENGAGEMENT**<br>▪ NPD aimed towards younger consumers<br>▪ Better availability of key recruiter brands<br>▪ Offer a clearly communicated own label range | +£12m | +£164m |
| **2 RETAIL ENVIRONMENT**<br>▪ Merchandise by style not brewer<br>▪ Twice as much space for the top ten brands to improve availability<br>▪ Year round availability of all big pack formats | +£15m | +£137m |
| **3 BRAND INNOVATION**<br>▪ New and adventurous styles<br>▪ Fewer but bigger launches<br>▪ Colour and style is the most important information for labels | +£21m | +£161m |

## GOLDEN ALES ARE TAKING SHARE FROM AMBER

The most logical way to segregate the PBA category is by gold/amber/dark. Although the boundaries can sometimes be blurred, consumers often drink with their eyes and understand this segmentation.

Although all colour styles are in growth Golden ales are driving the market forward despite having a smaller share than amber. This is due to the adoption of this style by brewers and retailers in reaction to the younger consumer demand.

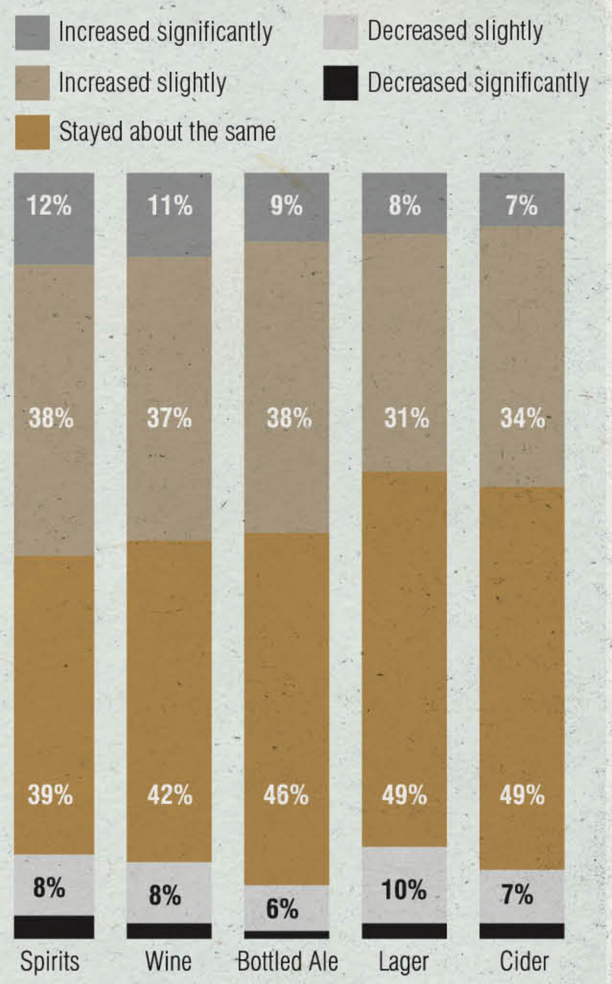
### PBA SALES BY COLOUR STYLE




**Source:** IRI All Outlets, 26 Feb 2016

## CONSUMERS ARE NOT NOTICING THE £RSP DECREASES

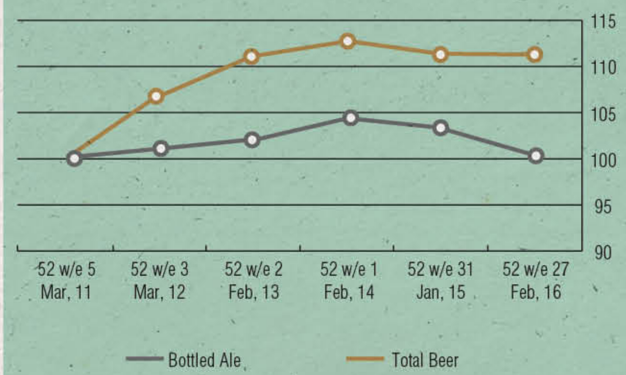
### CONSUMER PERCEPTION OF CATEGORY RSP




**Source:** RBD Shoppertrack 2016

## ONLY 7% OF CONSUMERS THINK BOTTLED ALE HAS DECREASED IN PRICE

### INDEXED RSP PER ML




**Source:** IRI All Outlets, Feb 2016

## CONSUMER BEHAVIOUR

We are now at the stage where British households have more disposable cash than they had before the 2008 financial crash. Higher wages and lower prices give the opportunity for growing categories to continue on course.

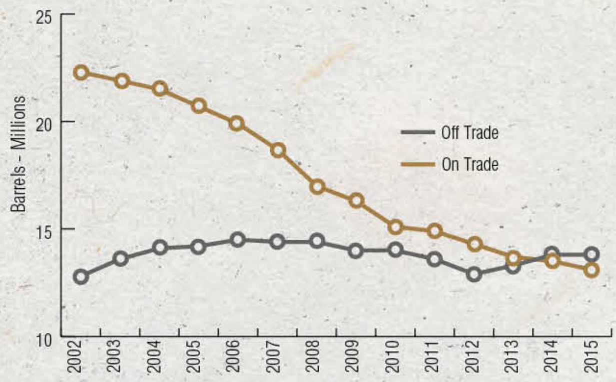
The last few years have seen shopping habits change with shoppers making fewer big trips and more top-up missions across multiple stores causing retailers to react with fierce price competition.

# MARKET TRENDS

Growth contribution from new shoppers has increased eightfold since last year. This trend is vital for the category to reach £1bn by 2020.

## OFF-TRADE HAS OVERTAKEN ON-TRADE BEER VOLUMES

### UK BEER VOLUME

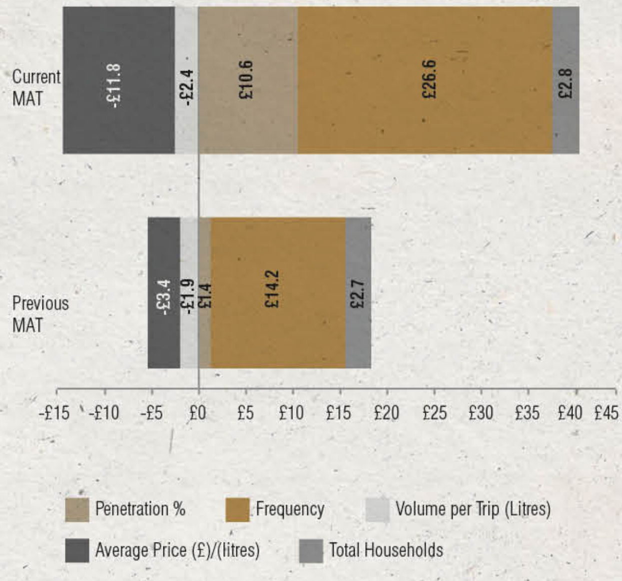



**2015** 13.8 Off Trade | 13.5 On Trade

**MILLIONS OF BARRELS**

**Source:** BBPA report

## PBA SOURCE OF GROWTH



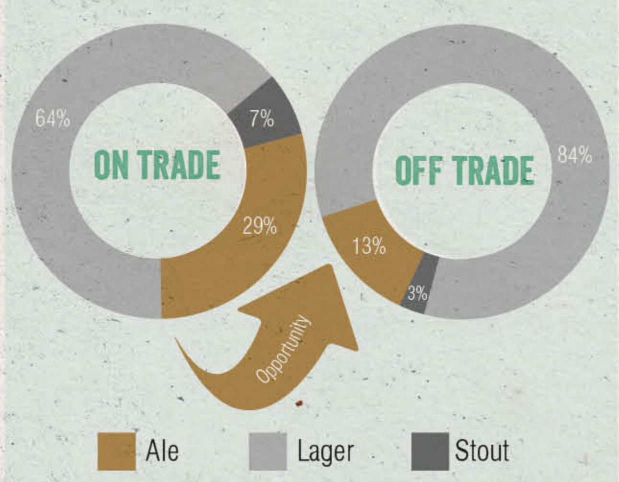

**Source:** Kantar WPO, 31 Jan 2016

## ALE HAS THE OPPORTUNITY TO DOUBLE ITS SHARE

Ale remains under half its rightful size in the Off-Trade.

The gap between Ale's share in the On-Trade and the Off-Trade represents the potential for the category when the recommendations in this report are put into action.

### SHARE OF BEER SALES BY CHANNEL




**Source:** IRI All Outlets, 28 Feb 2016

## MORE PEOPLE DRINK ALE IN THE ON-TRADE THAN THE OFF-TRADE

Shopper recruitment is vital for long term sustainable category growth. Some of those shoppers will come from the On-Trade where they are already drinking ale but not purchasing in the Off-Trade.

### ALE IS DRUNK IN PUBS BY AROUND HALF OF OUR SURVEY AUDIENCE

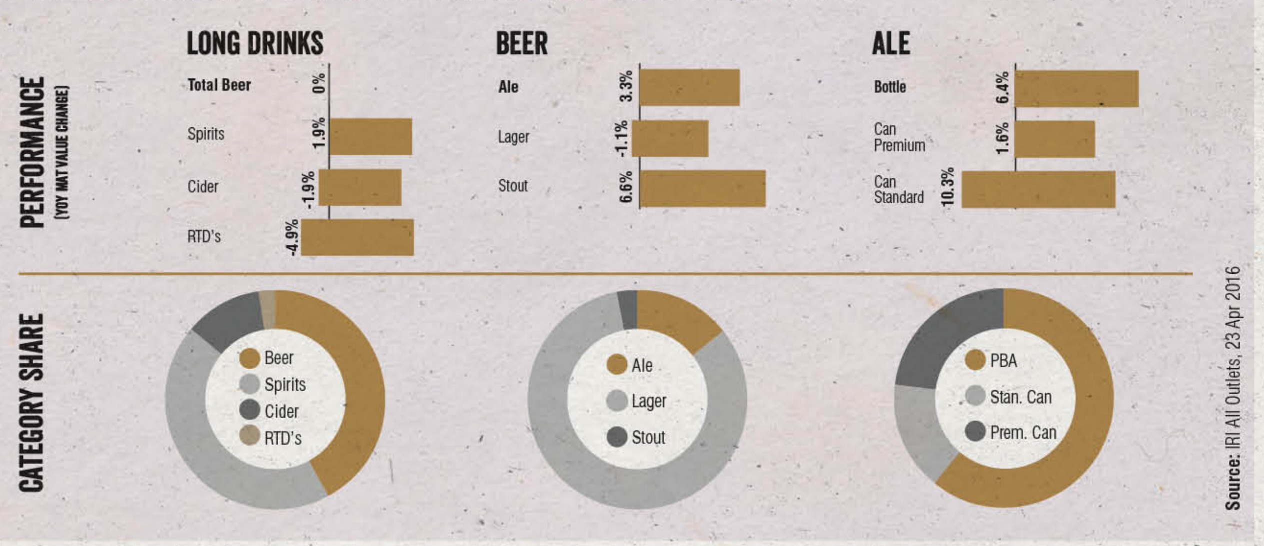
**51%** | **DRINK ALE IN PUBS**

**Source:** RBD Shoppertrack 2016

### OFF-TRADE CATEGORY PENETRATION %


**Source:** Kantar WPO, 31 Jan 2016

## DRINKS CATEGORY PERFORMANCE & CATEGORY SHARES




MIXED PACKS ARE GROWING FASTER THAN THE REST OF BOTTLED ALE, OFFERING A TRUSTED VARIETY OF STYLES FOR THE NEW CONSUMER

## TOP 20 PREMIUM BOTTLED ALES

**Source:** IRI All Outlets, 23 Apr 2016

| | Category Share | MAT Value | MAT Value % Change |
|---|---|---|---|
| **PBA (Excl. Mix Packs)** | | **£281,009,928** | 6% |
| Sharps Doom Bar | **7.1%** | £20,026,256 | 45% |
| Old Speckled Hen | **5.9%** | £16,535,729 | -6% |
| Hobgoblin | **5.4%** | £15,221,740 | 9% |
| Newcastle Brown Ale | **4.3%** | £12,108,000 | -10% |
| Fullers London Pride | **3.3%** | £9,412,068 | -16% |
| Spitfire | **2.7%** | £7,595,151 | -26% |
| Old Crafty Hen | **2.6%** | £7,286,659 | 54% |
| Theakston Old Peculier | **2.2%** | £6,219,610 | 9% |
| McEwans No 1 Champion Ale | **2.2%** | £6,217,041 | 14% |
| Badger Fursty Ferret | **2.2%** | £6,089,540 | -20% |
| Bishops Finger | **1.9%** | £5,267,514 | -11% |
| Landlord | **1.8%** | £5,019,703 | 38% |
| Tribute | **1.6%** | £4,578,297 | 8% |
| Abbot Ale | **1.5%** | £4,278,849 | 0% |
| Marston's Pedigree | **1.5%** | £4,163,271 | 19% |
| Black Sheep Ale | **1.4%** | £3,895,285 | -31% |
| Hobgoblin Gold | **1.4%** | £3,881,232 | 157% |
| St Austell Proper Job | **1.4%** | £3,878,975 | 91% |
| Banks's Bitter | **1.2%** | £3,487,336 | 0% |
| Old Golden Hen | **1.1%** | £3,100,197 | 13% |

## TOP 10 MIXED PACKS

**Source:** IRI All Outlets, 23 Apr 2016

| | Category Share | MAT Value | MAT Value % Change |
|---|---|---|---|
| **Mixed Packs** | | **£18,330,200** | 20% |
| Classic Ales of England | **39.7%** | £7,275,607 | 15% |
| Golden Ales | **14.7%** | £2,690,191 | 28% |
| Great British Ales | **11.0%** | £2,019,238 | 162% |
| Head Brewers Selection | **6.0%** | £1,105,081 | -27% |
| The Badger Sett | **4.6%** | £841,137 | -14% |
| Master Brewers Collection | **3.8%** | £700,615 | 27% |
| Wychwood Beers of Character | **3.4%** | £617,372 | 97% |
| Greene King Golden Beer Collection | **3.3%** | £610,922 | 1% |
| Badger Favourites Ale | **3.1%** | £559,131 | 179% |
| British Ale Selection | **2.3%** | £416,774 | 30% |

## TOP 10 PREMIUM CANNED ALES

**Source:** IRI All Outlets, 23 Apr 2016

| | Category Share | MAT Value | MAT Value % Change |
|---|---|---|---|
| **Premium Can** | | **£85,892,816** | 1% |
| Old Speckled Hen | **33.4%** | £28,645,940 | 9% |
| McEwans Export | **16.0%** | £13,754,140 | 0% |
| Abbot Ale | **7.4%** | £6,326,458 | 15% |
| Hobgoblin | **4.3%** | £3,661,473 | -8% |
| Tanglefoot | **4.0%** | £3,466,996 | -13% |
| Fullers London Pride | **3.8%** | £3,292,953 | 10% |
| Whitbread Gold Label | **3.8%** | £3,257,205 | -3% |
| Newcastle Brown Ale | **3.6%** | £3,086,075 | -9% |
| Bass Draught | **3.1%** | £2,645,435 | -15% |
| Badger Fursty Ferret | **2.6%** | £2,244,521 | 1% |

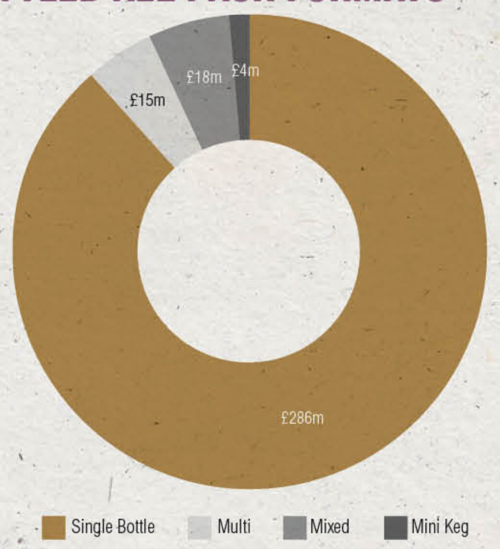
# MARKET SNAPSHOT

## TOP 10 CRAFT ALES

**Source:** IRI All Outlets, 23 Apr 2016

| | Category Share | MAT Value | MAT Value % Change |
|---|---|---|---|
| **Craft Bottle & Cans** | | **£24,415,093** | 71% |
| Punk Ipa | **41%** | £9,996,282 | 152% |
| Innis & Gunn Oak Aged Ale | **8%** | £2,864,802 | -2% |
| Sierra Nevada Pale Ale | **9%** | £2,100,961 | 57% |
| Dead Pony Club | **7%** | £1,607,550 | 111% |
| Goose Island Ipa | **4%** | £990,667 | 110% |
| Innis & Gunn Rum Finish | **4%** | £870,713 | 1% |
| Thwaites Crafty Dan 13 Guns Ale | **2%** | £552,473 | 2008% |
| Brewdog Nanny State Ale | **2%** | £490,398 | 283% |
| The Physics | **2%** | £419,593 | 44% |
| Anchor Steam Beer | **2%** | £371,404 | 8131% |

## BOTTLED ALE PACK FORMATS




**Source:** IRI All Outlets, 23 Apr 2016

## PBA SHOPPER NUMBERS

**Source:** Kantar WPO, 31 Jan 2016

| | 2016 | MAT % Change |
|---|---|---|
| **Total PBA** | **8,354,965** | 5% |
| Hobgoblin | 1,869,472 | 1% |
| Old Speckled Hen | 1,555,557 | 13% |
| Banks's Bitter | 1,165,771 | 13% |
| Spitfire | 1,118,546 | -13% |
| Marston's EPA | 1,025,643 | 31% |
| Hobgoblin Gold | 861,757 | 227% |
| Sharps Doom Bar | 833,318 | 7% |
| Bishops Finger | 733,471 | -14% |
| Ringwood Fortyniner | 718,581 | 13% |
| Badger Fursty Ferret | 690,988 | -18% |

**+376,000**

**MORE SHOPPERS IN THE LAST YEAR**

**+5%**

**INCREASE IN SHOPPERS**

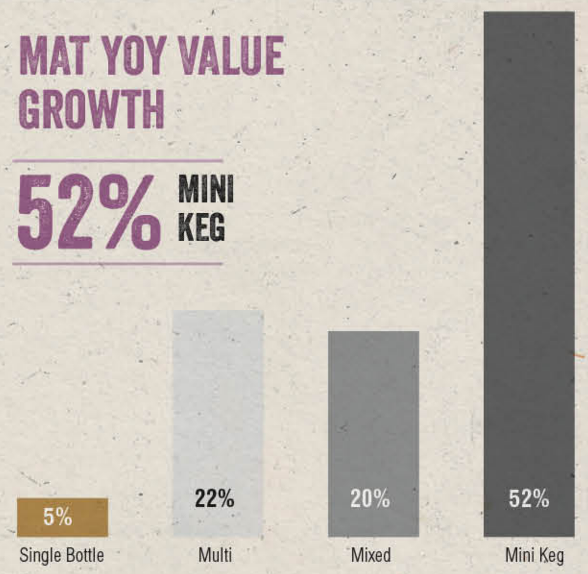
**THIS WAS ONLY 1.5% LAST YEAR**

**GROWTH FROM THIS YEAR'S NEW SHOPPERS HAS ADDED £10.6M TO THE BOTTLED ALE CATEGORY**

**Source:** Kantar WPO, 31 Jan 2016

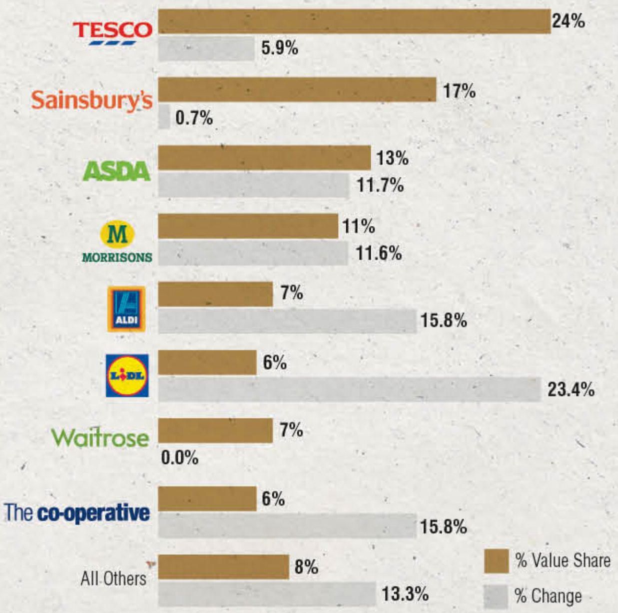
## MAT YOY VALUE GROWTH

**52% MINI KEG**




**Source:** IRI All Outlets, 23 Apr 2016

## RETAILER SHARE OF PBA



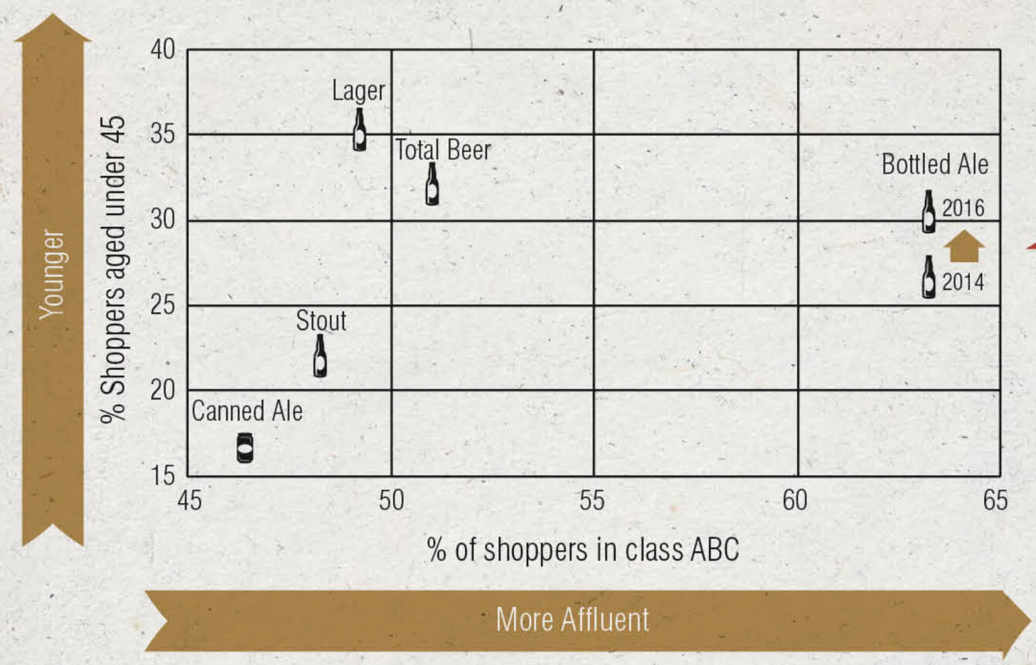

**Source:** Kantar WPO, 31 Jan 2016

## ★ KEY RECOMMENDATIONS ★

- NPD AIMED TOWARDS YOUNGER CONSUMERS
- ENSURE BETTER AVAILABILITY OF KEY RECRUITER BRANDS
- OFFER A CLEARLY COMMUNICATED OWN LABEL RANGE

## PBA DRINKERS ARE GETTING YOUNGER

The PBA consumer differs from the average beer drinker by being considerably more affluent whilst still young. This is an ideal demographic trend for any category.



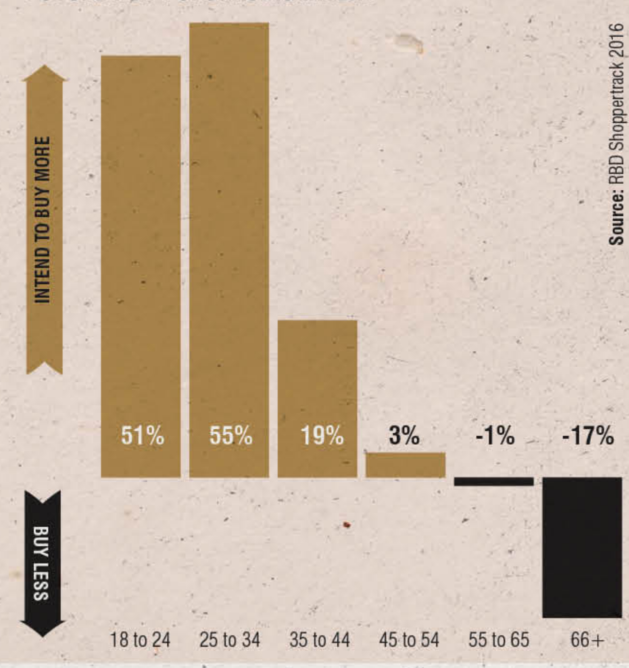

**Source:** Kantar WPO, 31 Jan 2016

THE SPEND FROM UNDER 45'S IS UP +16% YEAR ON YEAR

## YOUNGER SHOPPERS WILL BECOME MORE IMPORTANT

Future purchasing intent shows that this trend is only likely to increase. Younger consumers are going to become proportionately even more important.

### FUTURE PBA PURCHASING INTENT




**Source:** RBD Shoppertrack 2016

# SHOPPER ENGAGEMENT

## THE BIG BRANDS RECRUIT SHOPPERS

Whilst shoppers look for variety, brands are key to recruitment for the category. Around 4 in 10 of all purchasers who entered the PBA category for the first time in the past 5 years chose Hobgoblin.

It is imperative that more space is given to these key recruiter brands to ensure improved availability.

**“72% OF SHOPPERS CHOSE THESE BRANDS AS ONE OF THEIR FIRST PBAs”**


**% OF PURCHASERS WHO BOUGHT THE BRAND AS THEIR FIRST PBA**

38% 22% 12%

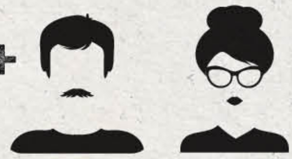
**Source:** RBD Shoppertrack 2016

## CLEARLY COMMUNICATED OWN LABEL RANGE AIMED AT YOUNGER CONSUMERS

18-34

**80%** BUY REGULARLY AND OCCASIONALLY

55+

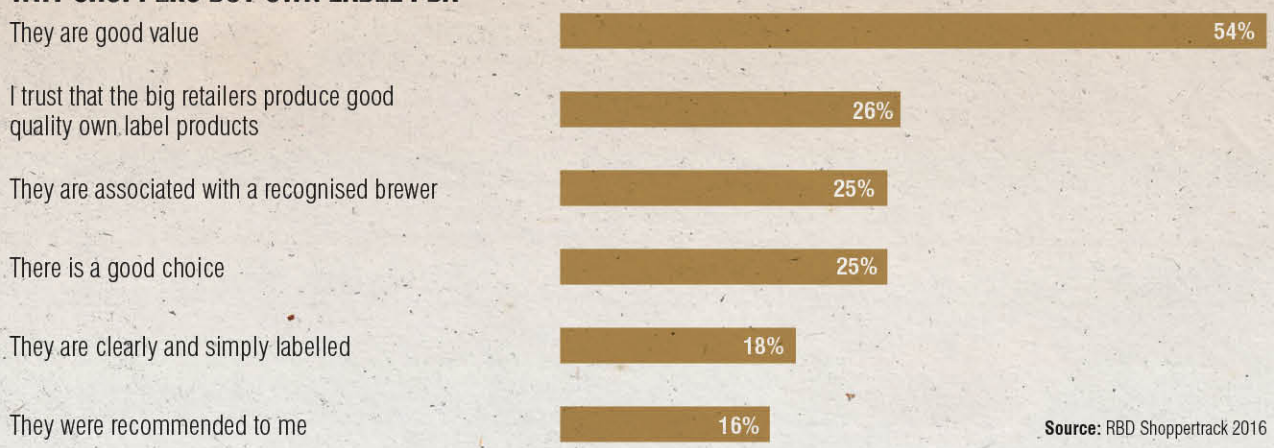


**45%** NEVER PURCHASE

## YOUNGER CONSUMERS HAVE A HIGHER PROPENSITY TO PURCHASE OWN LABEL PBA

Under 35's have a less developed relationship with brands leading to the greater propensity to purchase own label. Retailers should target their own label range at this group, ensure that it represents good value against brands and have faith in it carrying their branding.

### WHY SHOPPERS BUY OWN LABEL PBA




**Source:** RBD Shoppertrack 2016

# RETAIL ENVIRONMENT

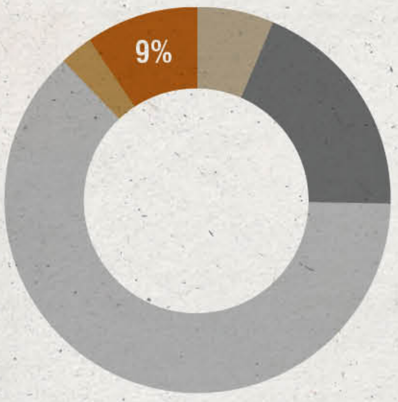
## ★ KEY RECOMMENDATIONS ★

- MERCHANDISE BY STYLE NOT BREWER
- MAXIMISE CONVENIENCE OPPORTUNITY THROUGH RANGE, SPACE AND VALUE.
- TWICE AS MUCH SPACE FOR THE TOP TEN BRANDS TO IMPROVE AVAILABILITY
- YEAR ROUND AVAILABILITY OF ALL BIG PACK FORMATS

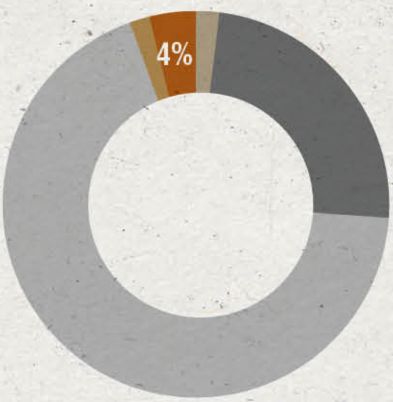
## BOTTLED ALE IS A £113M OPPORTUNITY IN CONVENIENCE

### VALUE SHARE BY CHANNEL

SUPERMARKETS




CONVENIENCE




If bottled ale in convenience had the same share of total beer & cider sales as it has in the supermarket channel it would add an extra £113m to the category in convenience.

- Canned Ale
- Cider
- Lager
- Stout
- Bottled Ale

**Source:** IRI All Outlets, 28 Feb 2016

| | SUPERMARKETS | CONVENIENCE |
|---|---|---|
| RSV | £241M | £71M |
| PBA share value of beer and cider | 9.4% | £113M OPPORTUNITY 3.6% |

**Source:** RBD Shoppertrack 2016

Maximising opportunity in convenience will be achieved by ensuring these three things:

1. TIGHT RANGE FOCUSING ON TOP BRANDS
2. SPACE IN CHILLER
3. VALUE OFFERING SUCH AS A MULTI-BUY

## CHILL ALE FOR IMMEDIATE CONSUMPTION

Over half of 18 - 54 year olds prefer drinking bottled ale chilled. This gives convenience stores the opportunity to take advantage of impulse purchases of bottled ale by merchandising in the fridge to allow for preferred immediate consumption.

**Source:** RBD Shoppertrack 2016

## MERCHANDISE BY STYLE

Consumers have identified that **style is the easiest way to shop the fixture** and recognise key style formats such as **Golden, Amber and Dark**. It is also acknowledged that consumers **shop across multiple brewers** and therefore ranging by brewer is less important.

### HOW SHOPPERS WANT BOTTLED ALE TO BE DISPLAYED

| | |
|---|---|
| 40% | BEER STYLE OR COLOUR |
| 27% | BREWER OR BRAND |
| 16% | BEER STRENGTH OR ABV |

**Source:** RBD Shoppertrack 2016


**43%** BUY A SELECTION OF DIFFERENT BRANDS EACH TRIP

## TWICE AS MUCH SPACE FOR THE TOP 10 BRANDS

It is key to ensure availability of the top 10 brands by giving twice the space to these brands in store. This is essential as a large proportion of consumers have a preferred brand. Always keeping stock of top brands is vital as they account for 35% of all volume.

**35%** OF ALL PBA VOLUME COMES FROM THE TOP 10 BRANDS!

**46%** HAVE A FAVOURITE OR PREFERRED BRAND OR LIST OF BRANDS

I EXPERIMENT WITH BOTTLED ALES OCCASIONALLY, BUT TYPICALLY STICK TO MY FAVOURITES

**53%** 47% IN THE PREVIOUS YEAR

AVAILABILITY IS KEY AS **1 IN 4** OF CONSUMERS WILL OPT TO BUY NOTHING IF THEIR FAVOURITE ALE IS OUT OF STOCK.


**Source:** RBD Shoppertrack 2016

## EACH BIG PACK PERFORMS A DISTINCT ROLE ALL YEAR ROUND THEREFORE THEY ALL NEED TO BE RANGED PERMANENTLY

### REASONS FOR PURCHASE OF BIG PACKS

**MULTI** THE VALUE OFFERING


| | |
|---|---|
| 66% | **They are good value** |
| 61% | For myself / family to drink at home |
| 43% | If they are part of a promotion |

**MIX** THE VARIETY OFFERING


| | |
|---|---|
| 66% | **like to have a variety of ales** |
| 61% | For myself / family to drink at home |
| 43% | They are good value |

**MINI KEG** THE MULTI-PURPOSE OFFERING


| | |
|---|---|
| 47% | **To use at an event (eg a party or bbq)** |
| 43% | They are good value |
| 37% | For myself / family to drink at home |

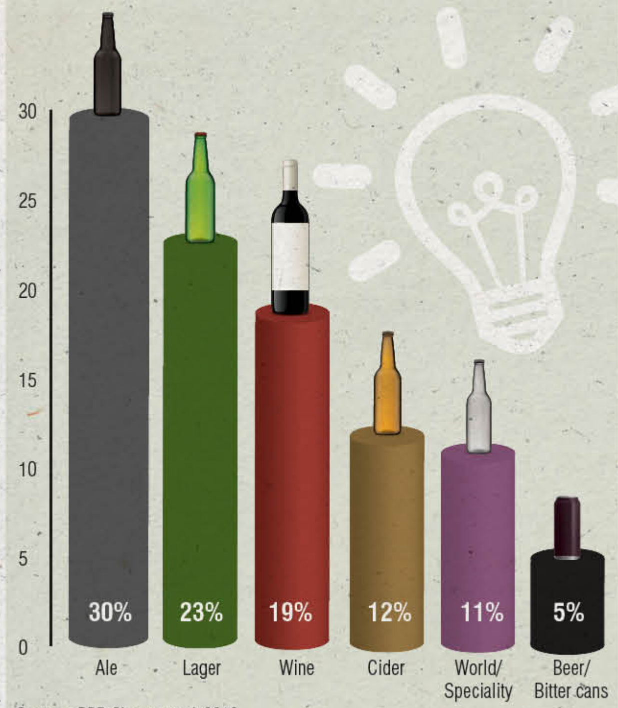
**Source:** RBD Shoppertrack 2016

# BRAND INNOVATION

## ★ KEY RECOMMENDATIONS ★

- NEW AND ADVENTUROUS STYLES
- FEWER BUT BIGGER LAUNCHES
- CONTINUOUS INNOVATION PIPELINE
- COLOUR AND STYLE ARE THE MOST IMPORTANT INFORMATION ON LABELS

## % OF CONSUMERS VIEWING THE CATEGORY AS THE MOST INNOVATIVE




**Source:** RBD Shoppertrack 2016

## CONSUMERS CONTINUE TO VIEW PBA AS THE MOST INNOVATIVE DRINKS CATEGORY IN THE OFF TRADE MARKET.

> “I AM CONSTANTLY LOOKING TO DISCOVER AND TRY NEW BEERS”

**Source:** MBC Focus Groups

## CLEAR BEER STYLES DELIVERED TOP SELLING BEERS

**TOP NPD WITH FIRST 12 MONTHS SALES**

£2.95M


LAUNCHED JULY 2014

£0.78M


LAUNCHED APRIL 2014

**2014 LAUNCHES**

£2.16M


LAUNCHED APRIL 2015

£0.47M


LAUNCHED AUGUST 2015

**2015 LAUNCHES**

**Source:** IRI all Outlets, 28 Feb 2016

# BRAND INNOVATION

## SHOPPERS DEMAND CLEAR INNOVATION

**% OF SHOPPERS WHO WANT THE FOLLOWING**


**ADVENTUROUS ALE STYLES**
Double IPA, Rye etc.

**HEALTHIER ALES**
Low calorie, gluten free, lower ABV etc

**FRUITY ALES**

**Source:** RBD Shoppertrack 2016

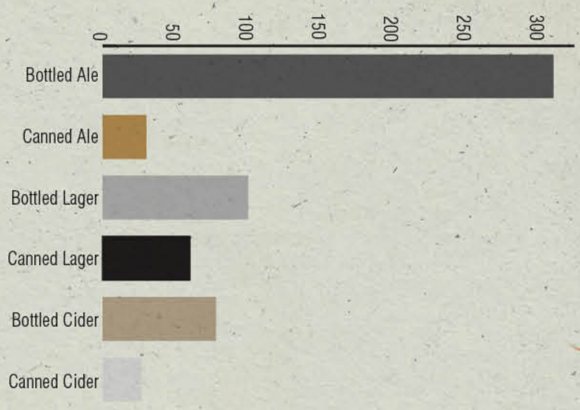
It is the responsibility of brewers and retailers to recognise this consumer demand for innovation through launching and supporting differentiated beer styles.

## PBA OVER INNOVATION

> **“1 IN 3 BOTTLED ALE LAUNCHES GET DELISTED WITHIN 2 YEARS”**

Whilst there is an expectation from consumers that PBA will be innovative, new product launches to date aren't meeting drinkers expectations.

**NPD LAUNCHED IN THE PAST 2 YEARS**




**Source:** IRI All Outlets, 26 Feb 2016

## STYLE AND ABV IS THE MOST IMPORTANT INFORMATION TO SHOPPERS

Whilst consumers are looking for innovation it needs to be clearly signposted. New and differentiated beer styles should be clearly labelled and provide purchasers with all of the information they require to make their decision at fixture.

**WHAT SHOPPERS THINK IS MOST IMPORTANT ON LABELS**


48% 21% 14% 7% 6%

**Source:** RBD Shoppertrack 2016

# CRAFT

## ★ KEY RECOMMENDATIONS ★

- CRAFT NEEDS TO COMPLIMENT EXISTING PBA RANGE
- STOCK A RANGE OF BRITISH AND US/IMPORTED CRAFT BEERS
- CRAFT SHOULD BE RANGED ON ITS OWN FIXTURE OR SHELF

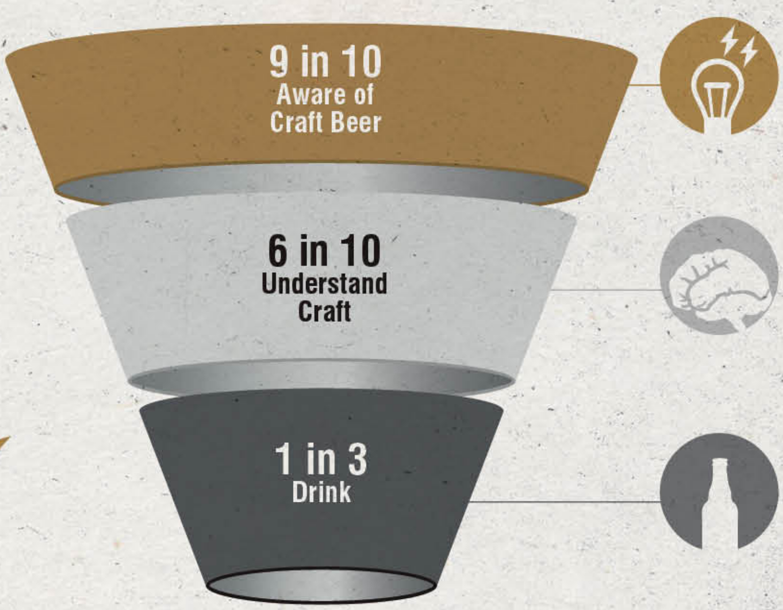
## AWARENESS OF CRAFT IS HIGH BUT THIS CURRENTLY DOES NOT TRANSLATE INTO REGULAR PURCHASE

The majority of shoppers are now aware of craft beer – this would suggest that the category has become more mainstream and differentiated from PBA.

Understanding and penetration of the category remain low. A clearer in-store definition and distinction from PBA would aid in converting some of these less knowledgeable shoppers into purchasers.

**Source:** RBD Shoppertrack 2016

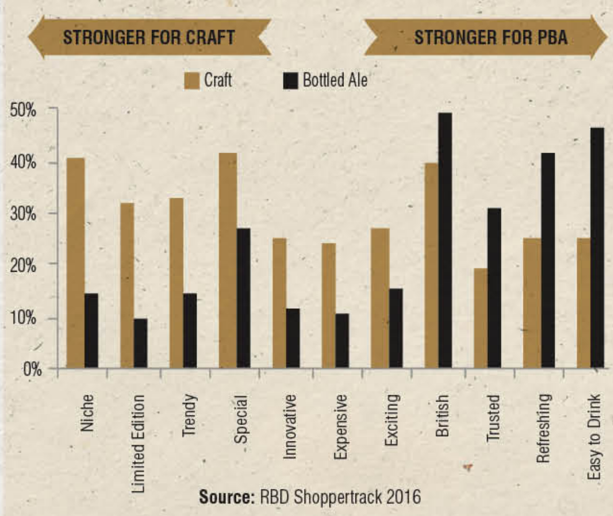
**SHOPPERS BUY CRAFT MONTHLY BUT PURCHASE PBA WEEKLY**




**Source:** RBD Shoppertrack 2016

## CROSSOVERS IN PERCEPTION OF PBA VS. CRAFT

### HOW SHOPPERS DESCRIBE CRAFT & PBA




**Source:** RBD Shoppertrack 2016

Consumer perceptions define categories and there is certainly much crossover in terms of definition between craft and PBA. However, craft clearly over-indexes with shoppers in some key areas.

Compared to PBA, consumers distinguish craft as being more niche, special and trendy – they also consider the category expensive. Therefore ranges should be focused on brands with these traits to ensure value is delivered vs. PBA.

Given that 'British' is one of the strongest cues for Craft, it is clear that the current craft fixture is over-populated with US and imported beers. As such there is an opportunity for authentic British Craft beers.

# SUMMARY AND RECOMMENDATIONS

## FOCUS AREA

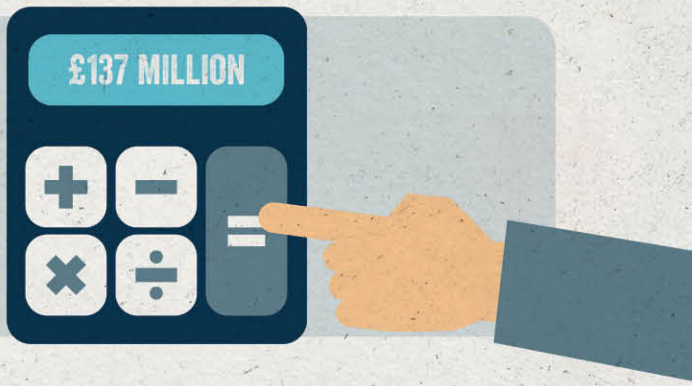
## 2020 OPPORTUNITY

### SHOPPER ENGAGEMENT

- NPD aimed towards younger consumers
- Ensure better availability of key recruiter brands
- Offer a clearly communicated own label range
- Craft should be ranged on its own fixture or shelf


### RETAIL ENVIRONMENT

- Merchandise by style not brewer
- Maximise convenience opportunity through range, space and value
- Twice as much space for the top ten brands to improve availability
- Year round availability of all big pack formats
- Stock a range of US/imported and British Craft beer




### BRAND INNOVATION

- New and adventurous styles
- Fewer but bigger launches
- Continuous innovation pipeline
- Colour and style is the most important information for labels
- Craft needs to complement the existing PBA range


**NEW SHOPPERS TO THE CATEGORY THIS YEAR SPENT 8 TIMES MORE THAN IN THE PREVIOUS YEAR**

**THE PBA CATEGORY CONTINUES TO BE THE STAR PERFORMER IN THE OFF-TRADE BEER MARKET. WITH THE STRONGEST GROWTH OF ANY CATEGORY IT HAS ADDED OVER £48M RSV TO THE TOTAL MARKET IN THE LAST YEAR.**

As well as seeing increased shopper demand, the category has also been driven by evolution to both the product and shopper experience. To reach the £1bn category target the developmental work from retailers and brewers must continue.

I hope you have found this report and our recommendations insightful and thought provoking, but more importantly both clear and actionable. If you have any questions and would like to discuss developing your PBA category further please get in touch.

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