

'White Cider' in context

Within total alcohol sales



'White cider' within total alcohol sales – key stats

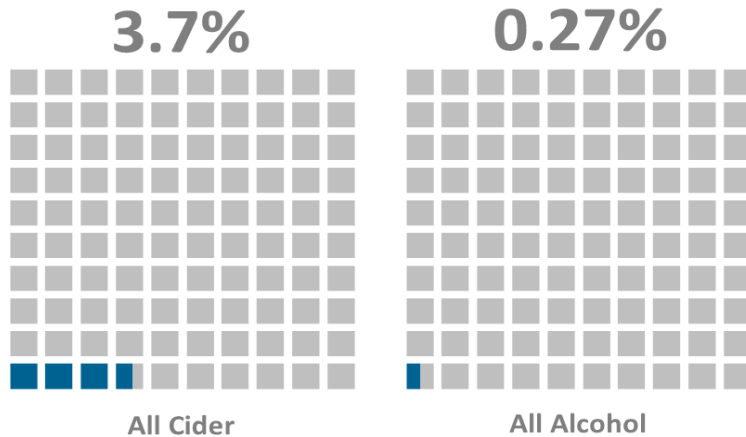
- At £68m the 'White Cider' category accounts for **ONLY** 3.7% of total cider sales and just 0.27% of all alcohol (fig 1)
- White cider consumption is in long-term volume decline currently - 6.9% YOY and is removing alcohol units (down 40 million units in the last 3 years) where as other higher average abv drinks categories such as sparkling wine and spirits are in growth and switching from cider has added units (+113 million units) (fig 2, 3 & 4)
- The majority of white cider sales comes from 3 litre PET bottles, but a trend towards the growth of smaller pack format consumption is already supporting an overall reduction in alc units (see fig 5)



'White cider' within total alcohol sales

Figure 1 – Size of 'White Cider' category

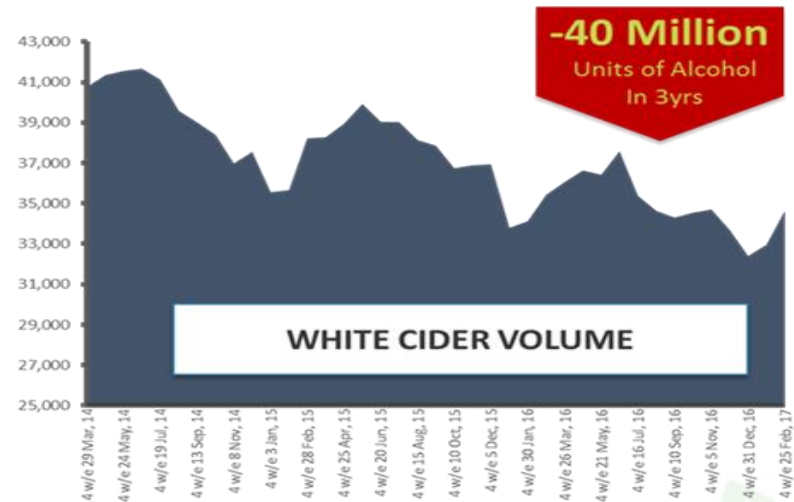
AT **£68m** WHITE CIDER ACCOUNTS FOR ONLY **3.7%** OF SALES OF ALL CIDER & **0.27%** OF ALL ALCOHOL



Source: IRI Market Data 52wk to 25th February 2017 /On Trade CGA data to 3/09/2016

Figure 2 - White Cider reduction in alc Units (2014-17)

WHITE CIDER -6.9% DECLINE HAS REMOVED **-40 MILLION UNITS OF ALCOHOL** FROM THE MARKET IN THE LAST 3 YEARS



Source: IRI Market Data 52wk to 25th February 2017 /On Trade CGA data to 3/09/2016

'White cider' – in decline

Figure 3 - Performance of White Cider V. other drinks

WHITE CIDER VOLUME DECLINE REMOVES ALCOHOL UNITS FROM THE UK WHILST SPIRITS AND SPARKLING WINE ADD UNITS

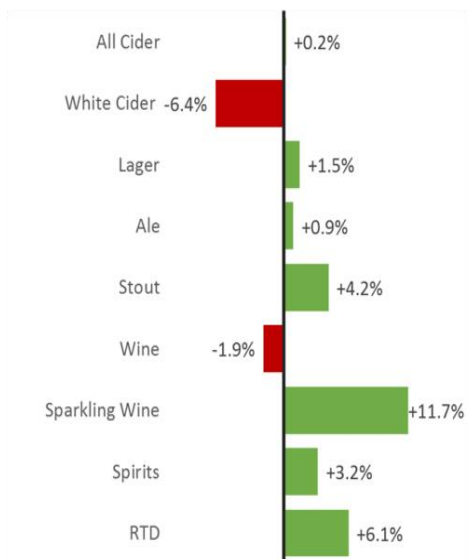


Figure 4 - Switch of Cider to higher abv drinks (2014-17)

CONSUMERS SWITCHING CIDER FOR OTHER DRINKS HAS INCREASED +113 MILLION UNITS OF ALCOHOL



Source: Kantar 3yrs Switching Data Jan 2017

Figure 5 - White Cider Consumption by pack format (2016-17)

TREND IN WHITE CIDER CONSUMPTION MOVING TO SMALLER PACKS IS SUPPORTING REDUCTION IN ALCOHOL UNITS

