

MUP: Q4 Full Year Review

IRI 52wk data (29th April 2018 > 27th April 2019)

Value in £

Volume in Litres

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Summary

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MUP is NOT driving a reduction in Total Alcohol Unit consumption

We are seeing an **unnatural distortion** of the alcohol market resulting in own label decline, reduced competition and consumption displacement affecting the **poorest** households the most.

OWN LABEL DEMISE

Own Label Volume has severely declined because of MUP to the point that some Own Label lines have been removed from ranges consequently denying choice amongst the poorest of consumer households

Category	Own Label Volume %CHG	Own Label proportion (%) of overall category decline
SPIRITS	-20%	28%
FORTIFIED	-13%	53%
WINE	-7%	13%
LAGER	-37%	11%
ALE & STOUT	-10%	3%
CIDER	-47%*	12%*

*Excludes Retail Exclusive Brands e.g. Asda Hawksridge, Tesco Crofters, & the Discounter brands such as Aldi Taurus and Lidl Woodgate.

REDUCED COMPETITION

Shopper choice has also been reduced within Brands.

Certain Pack Sizes, Packaging Formats, Brands and Manufacturers have been disproportionately affected as retailers modify ranges forcing volume to transfer to the remaining competitor products.



CONSUMPTION DISPLACEMENT

The evidence points to consumers switching from lower/mid strength Long Alcoholic Drinks to other higher strength alcohol categories, that deliver a far higher concentration of alcohol units/litre.

1 A surge in growth of 8% ABV and 15% ABV caffeinated alcoholic drinks



2 Higher ABV Premium Lager winning at the expense of Standard Lager



3 Spirits Volumes have seen strong growth as consumption increases



Headline Volume Impacts



SPIRITS

- MUP has forced consumers away from some brands (+ own label) into others and away from larger pack sizes into smaller ones yet overall Spirits volume purchased has not reduced. The reality is Scottish Consumers have purchased +7.5M additional Units of Alcohol vs Last Year within the Spirits category.
- Own Label at -20% leads the volume decline, driven in particular by OL Vodka and OL Whisky. This is closely followed by branded decline from Bells, Famous Grouse, Bacardi and Russian Standard.
- 1 Litre and 1.5 Litre bottles across Own Label and Brands have sold significantly less as volume switches into smaller Btls, particularly 70cl and 35cl.
- Whisky is by far the worst hit sector accounting for 57% of all volume loss in the Spirits category



FORTIFIED

- MUP has potentially encouraged consumer to displace their consumption from cider into higher strength 15% ABV caffeine laced strong tonic wines which, with RSP's unaffected by MUP, have added millions more Units of Alcohol into Scotland.
- Buckfast caffeinated Tonic Wine has seen accelerated +11% volume growth since the introduction of MUP, adding over +11.9M Units of Alcohol to the Scottish market whilst "Scotlands Own" Eldorado Tonic Wine has seen almost +400% growth adding a further +4M Units of Alcohol. Combined, that's over +16M additional Units of Alcohol.
- Own Label shoppers, similar to within Spirits, are the most affected by MUP within the this category, leading to OL volume decline across the traditional fortified sectors of Sherry , Vermouth, British and Ginger Wine.
- Well known brands such as Harveys , Croft , Dows and Taylors are also declining whilst the caffeinated Tonic Wines post exceptional growth.

Headline Volume Impacts



WINE

- Once again Own Label is hit hardest as the biggest impact of MUP in the wine category affected 3L Boxed Wine (a segment dominated [80%] by Own Label), which, as a consequence of MUP has lost -52% of its volume. The demise of 3L Boxed Wine has removed 20M Units of Alcohol from the Wine category however two thirds of this (14M) simply came back into the category via the smaller 2.25L Box.
- There has been growth in the 2.25L Boxed Wine format across both Own Label and Brands as a consequence of retailers and branded manufacturers shrinking their pack sizes to purposefully hit on-shelf price points that are more acceptable to the Supermarket shopper.
- The standard bottled wine market (75cl) was largely unaffected by MUP whilst larger 1L and 1.5L Bottles have declined.



RTD (Ready to Drink)

- Similar to the dynamic witnessed within the Fortified category MUP has potentially encouraged consumer to displace consumption from cider into higher strength 8% ABV caffeinated drinks such as Dragon Soup. Overall, the RTD category has added an additional +12.6M Units of Alcohol into Scotland vs Last Year.
- Dragon Soup Caffeinated Alcoholic Beverage is by far the biggest beneficiary of MUP in the RTD category and it is the largest contributor to Alcohol Units. Its volume growth surged to +30% YoY and it added +6.3M Units of Alcohol YoY into the Scottish Market, taking the brand's total Alcohol Unit contribution to 28M units.
- The remainder of the category has a high proportion of Spirit mixed drinks averaging 5% ABV and there has been growth in branded Gin, Vodka and Rum variants notably Gordons, Smirnoff and Captain Morgans.

Headline Volume Impacts



LAGER

- The Lager category has grown since the introduction of MUP and has added an additional +34.6M Units of Alcohol into the Scottish Market. 33.8M Units of this [85%] is a result of Scottish Consumers buying more higher ABV Premium Lagers such as Corona (4.5% ABV), Heineken (5% ABV), Estrella Damn (5.4% ABV), Desperados (5.8% ABV).
- Own Label declines despite often being lower strength ABV option and this decline is a consequence of either OL becoming a less attractive as the price differential vs Brand narrows or of retailers removing the Own Label from sale therefore removing consumer choice.
- Across Premium Lager and Standard Lager 24pk/20pk/18pk have been removed and replaced with 15pk/12pk, 10pk as retailers/ manufacturers shrink pack sizes to purposefully hit attractive price points. This reduction makes it even more staggering that the category grew adding +34.6M Units of Alcohol.



ALE & STOUT

- Ale added an additional +8.3M Units of Alcohol to the Scottish Market. The top brands that contributed to this growth were McEwans Export Can (4.5% ABV), Newcastle Brown Ale Btl (4.7% ABV). A long tail of other brands also contributed to the increase, a good proportion of them premium or “craft” ales such as Brewdog or Lagunitas which typically have ABV’s higher than 6%.
- Stout, dominated by Guinness, has seen little impact from MUP

Headline Volume Impacts



PERRY

- Perry is the second hardest hit segment as a consequence of MUP with Volume decline across the 2 main brands, primarily Lambrini (Btl) followed by Country Manor (Box) which between them make up 90% of the category. This Volume decline has removed -10.7M Units of Alcohol from the Scottish Market.
- Lambrini is a Glass Bottle brand and its net -30% Volume loss is driven by the demise of its 7.5% ABV 1.5L Btl which posted -73% decline. Some of this decline has been offset the decision to introduce a new 1.25L Btl with a 6% ABV.
- Country Manor is a 7.5% ABV Perry and only available in a 3L Box which has suffered significant -80% YoY decline.

Headline Volume Impacts



CIDER

- Cider is the hardest hit segment as a consequence of MUP with Volume decline across many Brands [e.g. Strongbow 5% ABV, Frosty Jacks 7.5% ABV, Stella Cidre ABV 4.5%] Retailer Exclusive Brands [e.g. Tesco Crofters 5% ABV, Asda Hawksridge 4.2% ABV] and Retailer Own Label. This Volume decline has removed 57M Units of Alcohol from the Scottish Market.
- MUP has lead to the collapse of the PET format [-57%] indiscriminately across Brands, Retailer Exclusive Brands and Retailer Own Brands (ABV's ranging from 4.2% ABV to 7.5% ABV)
- MUP precipitated the removal of 18pks/20pks of Mainstream brands from retailer ranges (e.g. Strongbow) as prices were forced near to or over £20. With the intention of hitting more attractive on-shelf price points retailers and manufacturers focus has shifted to mid-packs (10pk/12pk).

CIDER (cont)

- Frosty Jacks Volumes have tumbled by -75% vs LY, Strongbow by -12%, Own Label by -47%, Crofters (Tesco Exclusive) by -69% whilst the Fruit Ciders such as Strongbow Dark Fruit +40% and Kopparberg Strawberry & Lime +24% witnessed the strongest gains.
- Other brands that accelerated their volume growth include those on the higher ABV spectrum across Can and Glass Bottle such as K Cider Can (8% ABV, +12% growth) and the Thatchers Vintage (7.5% ABV, +122% growth) and Westons Vintage (8.2% ABV, +10.4% Growth).
- Woodpecker Cider (3.5% ABV) was the 4th fastest growing brand in Scotland adding +1.5kHL across its Can and, to a lesser extent, its PET format.

APPENDIX

- Spirits



Spirits - Sectors

Row Labels										Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
		Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	52wk	52wk	Variance	
Gin		£77,124,512	£114,425,818	+48.4%	£37,301,306	3,740,587	5,045,142	+34.9%	+1,304,556	145,635,404	194,454,346	+48,818,942	+33.5%
Vodka		£224,699,767	£239,680,922	+6.7%	£14,981,155	11,976,331	13,142,365	+9.7%	+1,166,034	456,335,742	456,055,899	-279,843	-0.1%
Aperitif		£1,329,503	£1,508,500	+13.5%	£178,997	62,540	70,735	+13.1%	+8,195	1,646,078	1,783,973	+137,895	+8.4%
Cachaca		£14,504	£11,888	-18.0%	-£2,616	533	455	-14.6%	-78	20,388	17,290	-3,098	-15.2%
Tequila		£1,632,564	£1,612,420	-1.2%	-£20,144	55,807	54,886	-1.6%	-920	2,120,309	2,082,718	-37,590	-1.8%
Spirit Drink		£7,844,027	£7,105,922	-9.4%	-£738,106	268,510	235,174	-12.4%	-33,336	6,228,237	5,210,898	-1,017,339	-16.3%
Brandy		£23,591,606	£22,979,101	-2.6%	-£612,506	1,067,372	1,000,471	-6.3%	-66,901	40,833,100	38,237,043	-2,596,056	-6.4%
Liqueur		£44,725,653	£43,955,375	-1.7%	-£770,278	2,563,740	2,453,072	-4.3%	-110,669	55,997,272	52,815,259	-3,182,013	-5.7%
Rum		£54,192,575	£53,147,087	-1.9%	-£1,045,488	2,808,105	2,591,159	-7.7%	-216,946	105,975,452	97,417,002	-8,558,451	-8.1%
Whisky		£174,984,041	£176,727,604	+1.0%	£1,743,563	7,692,501	7,128,348	-7.3%	-564,154	312,132,225	286,320,724	-25,811,501	-8.3%
Grand Total		£610,138,753	£661,154,636	+8.4%	£51,015,884	30,236,026	31,721,808	+4.9%	+1,485,781	1,126,924,207	1,134,395,153	+7,470,946	+0.7%

Spirits - Brands

TOP 10 VOLUME WINNERS

Row Labels	▼									Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
		Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	52wk	52wk	Variance	
Smirnoff		£89,509,416	£99,077,315	+10.7%	£9,567,899	4,796,148	6,200,989	+29.3%	+1,404,840	181,619,262	189,945,311	+8,326,049	+4.6%
Gordons		£33,609,222	£52,653,548	+56.7%	£19,044,326	1,797,111	2,611,660	+45.3%	+814,549	67,745,906	98,372,781	+30,626,876	+45.2%
Glens		£71,696,575	£82,913,524	+15.6%	£11,216,949	3,780,928	4,219,510	+11.6%	+438,581	142,762,329	159,858,545	+17,096,217	+12.0%
Whitley Neill		£1,186,112	£4,461,829	+276.2%	£3,275,717	37,961	143,961	+279.2%	+106,000	1,599,955	6,157,903	+4,557,948	+284.9%
Absolut		£7,004,599	£9,383,432	+34.0%	£2,378,833	296,922	401,283	+35.1%	+104,361	11,876,891	16,002,860	+4,125,970	+34.7%
Bacardi Carta Blanca		£3,820,460	£5,410,771	+41.6%	£1,590,311	176,607	252,772	+43.1%	+76,165	6,622,767	9,478,966	+2,856,199	+43.1%
Whitley Neil Quince Gin		£443,259	£2,755,474	+521.6%	£2,312,214	13,063	88,190	+575.1%	+75,127	561,729	3,792,169	+3,230,440	+575.1%
Beefeater		£146,680	£1,725,966	+1076.7%	£1,579,286	6,799	80,498	+1084.0%	+73,699	273,054	3,052,707	+2,779,653	+1018.0%
Tanqueray		£6,436,599	£8,744,918	+35.9%	£2,308,318	274,833	340,146	+23.8%	+65,313	11,854,310	14,550,795	+2,696,484	+22.7%
Baileys		£8,914,723	£10,050,274	+12.7%	£1,135,551	590,923	644,221	+9.0%	+53,299	10,024,688	10,899,253	+874,565	+8.7%

TOP 10 VOLUME LOSERS

Green Mark		£1,712,075	£999,273	-41.6%	-£712,802	102,194	52,310	-48.8%	-49,883	3,883,553	1,987,789	-1,895,763	-48.8%
Grants		£6,526,569	£6,243,909	-4.3%	-£282,660	371,255	307,499	-17.2%	-63,756	14,849,127	12,280,721	-2,568,407	-17.3%
Greenall's		£4,880,632	£4,060,334	-16.8%	-£820,298	267,194	201,602	-24.5%	-65,592	10,134,668	7,614,069	-2,520,599	-24.9%
Nikita Imperial Vodka		£1,076,354	£111,171	-89.7%	-£965,182	75,398	7,148	-90.5%	-68,251	2,827,440	268,039	-2,559,401	-90.5%
Morgans Spiced		£16,764,148	£16,018,979	-4.4%	-£745,169	915,930	827,933	-9.6%	-87,997	35,954,895	32,409,269	-3,545,627	-9.9%
Russian Standard		£16,872,075	£16,765,227	-0.6%	-£106,847	937,784	843,131	-10.1%	-94,653	37,445,315	33,441,445	-4,003,870	-10.7%
The Famous Grouse		£37,112,480	£37,321,490	+0.6%	£209,010	1,941,587	1,772,040	-8.7%	-169,547	80,871,340	71,054,691	-9,816,650	-12.1%
Bacardi		£13,914,537	£11,004,813	-20.9%	-£2,909,724	756,397	572,332	-24.3%	-184,065	28,256,931	21,198,879	-7,058,053	-25.0%
Bell's		£13,363,346	£10,803,861	-19.2%	-£2,559,485	789,453	538,601	-31.8%	-250,852	31,578,215	21,544,028	-10,034,187	-31.8%
Own Label		£61,164,731	£55,391,893	-9.4%	-£5,772,838	3,612,753	2,900,582	-19.7%	-712,171	134,765,215	106,674,071	-28,091,144	-20.8%
Grand Total		£610,138,753	£661,154,636	+8.4%	£51,015,884	30,236,026	31,721,808	+4.9%	+1,485,781	1,126,924,207	1,134,395,153	+7,470,946	+0.7%

Spirits – Pack Sizes

Row Labels										Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
		Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	52wk	52wk	Variance	
700		£284,048,729	£324,176,627	+14.1%	£40,127,897	12,677,370	14,052,031	+10.8%	+1,374,661	468,535,398	523,672,859	+55,137,461	+11.8%
350		£57,540,341	£65,437,245	+13.7%	£7,896,904	2,548,901	2,884,723	+13.2%	+335,822	96,984,738	109,518,236	+12,533,497	+12.9%
500		£18,818,327	£23,731,764	+26.1%	£4,913,437	724,109	913,935	+26.2%	+189,826	19,301,809	25,026,223	+5,724,414	+29.7%
200		£16,176,508	£18,381,963	+13.6%	£2,205,454	621,106	706,641	+13.8%	+85,535	22,874,364	26,260,926	+3,386,563	+14.8%
150		£575,824	£718,666	+24.8%	£142,842	8,498	10,079	+18.6%	+1,581	347,326	413,119	+65,793	+18.9%
600		£135	£24,113	+17761.8%	£23,978	2	715	+29675.0%	+712	96	28,584	+28,488	+29675.0%
250		£453,674	£458,863	+1.1%	£5,189	10,902	11,233	+3.0%	+331	438,729	455,200	+16,471	+3.8%
300		£9,441	£26,370	+179.3%	£16,929	89	247	+179.3%	+159	3,540	9,889	+6,348	+179.3%
1750		£164,086	£216,586	+32.0%	£52,501	9,692	9,723	+0.3%	+32	315,830	368,534	+52,705	+16.7%
110		£1,345	£23	-98.3%	-£1,322	12	0	-98.2%	-11	464	8	-455	-98.2%
530		£446	£76	-82.9%	-£370	25	3	-89.6%	-23	1,018	106	-912	-89.6%
40		£48,386	£24,291	-49.8%	-£24,095	378	222	-41.3%	-156	13,243	7,780	-5,463	-41.3%
240		£3,893	£86	-97.8%	-£3,807	208	5	-97.8%	-203	2,284	50	-2,233	-97.8%
50		£1,825,400	£1,838,071	+0.7%	£12,671	30,746	30,445	-1.0%	-301	1,186,187	1,182,633	-3,554	-0.3%
180		£31,572	£14,865	-52.9%	-£16,706	630	278	-55.8%	-352	22,044	9,740	-12,304	-55.8%
20		£163,716	£108,345	-33.8%	-£55,371	1,846	1,473	-20.2%	-373	57,363	36,217	-21,145	-36.9%
400		£28,500	£7,822	-72.6%	-£20,678	976	242	-75.3%	-735	18,063	1,302	-16,761	-92.8%
3000		£22,371	£0	-100.0%	-£22,371	883	0	-100.0%	-883	33,560	0	-33,560	-100.0%
4500		£233,285	£1,788	-99.2%	-£231,497	16,637	113	-99.3%	-16,524	665,460	4,500	-660,960	-99.3%
100		£1,299,461	£452,248	-65.2%	-£847,213	32,538	10,851	-66.7%	-21,687	1,293,533	423,211	-870,322	-67.3%
750		£359,728	£173,565	-51.8%	-£186,163	46,739	20,133	-56.9%	-26,607	726,553	302,451	-424,102	-58.4%
1200		£224,489	£24,841	-88.9%	-£199,649	51,106	5,643	-89.0%	-45,464	2,044,251	225,701	-1,818,550	-89.0%
1000		£220,360,149	£221,814,039	+0.7%	£1,453,890	12,972,885	12,871,187	-0.8%	-101,698	490,380,246	438,917,360	-51,462,886	-10.5%
1500		£7,748,946	£3,522,380	-54.5%	-£4,226,566	479,748	191,888	-60.0%	-287,860	21,678,110	7,530,524	-14,147,586	-65.3%
Grand Total		£610,138,753	£661,154,636	+8.4%	£51,015,884	30,236,026	31,721,808	+4.9%	+1,485,781	1,126,924,207	1,134,395,153	+7,470,946	+0.7%

APPENDIX

- Fortified



Fortified - Sectors

Row Labels	Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
									52wk	52wk	Variance	
British	£72,408,961	£85,767,897	+18.1%	£13,388,180	7,592,249	8,614,229	+13.3%	+1,025,196	113,741,532	129,103,372	+15,361,841	+13.5%
Other	£243,285	£280,639	+15.0%	£37,179	19,924	25,261	+26.2%	+5,316	306,079	386,715	+80,636	+26.3%
Madeira	£150,995	£157,850	+4.4%	£6,758	9,781	10,043	+2.5%	+246	185,845	190,816	+4,971	+2.7%
Port	£5,701,294	£5,826,451	+2.0%	£117,563	479,870	466,128	-3.0%	-14,542	9,543,160	9,255,081	-288,079	-3.0%
Ginger Wine	£568,498	£542,872	-4.2%	-£24,093	89,827	73,513	-17.7%	-16,111	1,064,957	863,884	-201,074	-18.9%
Montilla	£738,174	£703,347	-4.7%	-£35,614	94,408	77,685	-17.6%	-16,935	1,572,178	1,304,002	-268,176	-17.1%
Vermouth	£3,043,651	£3,201,988	+4.9%	£152,536	410,537	377,818	-8.0%	-33,394	6,172,399	5,676,312	-496,087	-8.0%
Sherry	£5,587,972	£5,483,720	-2.1%	-£117,492	565,643	524,210	-7.4%	-42,699	9,850,135	9,134,054	-716,081	-7.3%
Grand Total	£88,442,830	£101,964,764	+15.0%	£13,525,017	9,262,239	10,168,887	+9.6%	+907,078	142,436,285	155,914,235	+13,477,950	+9.5%

Fortified - Brands

TOP 10 VOLUME WINNERS

Row Labels										Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
		Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	52wk	52wk	Variance	
Buckfast		£68,729,559	£79,409,640	+15.3%	£10,693,415	6,976,926	7,772,648	+11.2%	+797,344	104,653,888	116,589,708	+11,935,821	+11.4%
Eldorado		£617,362	£3,066,785	+395.3%	£2,461,776	67,904	339,666	+398.4%	+273,079	1,018,566	5,094,992	+4,076,426	+400.2%
Qc		£901,883	£1,391,704	+54.1%	£494,202	127,219	182,539	+43.4%	+55,925	1,908,549	2,738,084	+829,535	+43.5%
Cockburns		£1,436,090	£1,631,769	+13.5%	£197,014	118,332	125,193	+5.8%	+6,924	2,344,807	2,470,700	+125,893	+5.4%
Cinzano		£168,253	£221,098	+31.5%	£53,754	20,862	27,612	+32.4%	+6,861	312,933	414,173	+101,240	+32.4%
Mansion House		£187,264	£247,666	+33.0%	£62,372	30,058	35,426	+18.6%	+5,666	390,754	460,539	+69,785	+17.9%
Martini		£1,280,889	£1,355,361	+5.1%	£66,708	125,412	130,235	+3.2%	+4,078	1,882,761	1,954,592	+71,831	+3.8%
Harvest Gold Mead		£19,769	£35,142	+77.0%	£15,500	3,204	5,405	+68.1%	+2,222	48,059	81,071	+33,012	+68.7%
Cairn O Mohr		£0	£14,094	#DIV/0!	£14,094	0	1,316	#DIV/0!	+1,316	0	17,497	+17,497	#DIV/0!
Tokaji		£18	£9,611	+53393.0%	£9,611	2	827	+55100.0%	+827	23	12,398	+12,375	+55000.0%

TOP 10 VOLUME LOSERS

Croft	£1,723,471	£1,670,891	-3.3%	-£58,414	147,075	140,877	-4.6%	-6,823	2,573,823	2,471,577	-102,246	-4.0%
Club Royal	£125,287	£82,379	-33.6%	-£42,835	18,887	10,989	-41.0%	-7,887	283,298	164,837	-118,461	-41.8%
Ipl	£286,223	£301,002	+4.9%	£14,382	49,791	41,728	-16.0%	-8,132	746,865	625,920	-120,945	-16.2%
Dows	£592,239	£516,713	-13.0%	-£77,862	49,799	41,642	-16.6%	-8,357	995,973	832,841	-163,132	-16.4%
Belgars	£33,815	£456	-98.6%	-£33,362	8,763	112	-98.6%	-8,653	115,032	1,077	-113,955	-99.1%
Harveys	£1,846,437	£1,756,561	-5.0%	-£93,486	160,187	151,235	-5.7%	-9,270	2,803,273	2,646,608	-156,665	-5.6%
Taylors	£1,329,945	£1,259,221	-5.4%	-£72,092	101,502	91,249	-10.1%	-10,402	2,025,859	1,820,795	-205,064	-10.1%
Scotsmac	£69,066	£2,975	-95.0%	-£66,889	12,087	416	-95.9%	-11,810	181,307	6,241	-175,066	-96.6%
Old Westminster	£157,465	£117,688	-24.5%	-£39,239	31,139	18,048	-41.0%	-12,986	404,811	234,618	-170,193	-42.0%
Own Label	£7,023,767	£7,186,361	+2.2%	£157,613	1,035,103	903,031	-12.7%	-133,242	17,028,834	15,006,333	-2,022,501	-11.9%
Grand Total	£88,442,830	£101,964,764	+15.0%	£13,525,017	9,262,239	10,168,887	+9.6%	+907,078	142,436,285	155,914,235	+13,477,950	+9.5%

APPENDIX

- Wine



Wine – Formats Performance & Brand Losers

Row Labels	Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	Alc Units LY 52wk	Alc Units TY 52wk	Alc Units Variance	Alc Units %CHG
Btl	£478,675,509	£498,233,592	+4.1%	£19,558,083	63,967,766	64,003,932	+0.1%	+36,165	794,209,997	793,548,381	-661,616	-0.1%
Mini Btl	£9,530,886	£9,674,063	+1.5%	£143,177	989,567	952,385	-3.8%	-37,182	12,115,349	11,736,998	-378,352	-3.1%
Half Btl	£254,725	£900,468	+253.5%	£645,743	20,530	86,888	+323.2%	+66,358	255,509	1,121,566	+866,057	+339.0%
Large Btl/Pouch	£1,816,318	£1,730,637	-4.7%	-£85,681	317,507	268,359	-15.5%	-49,149	3,620,618	3,076,874	-543,743	-15.0%
Bag-in-Box	£35,557,918	£36,921,914	+3.8%	£1,363,995	6,583,782	6,137,372	-6.8%	-446,411	81,310,493	75,315,927	-5,994,566	-7.4%
2250	£19,532,719	£28,551,113	+46.2%	£9,018,394	3,434,319	4,653,297	+35.5%	+1,218,978	42,558,823	56,484,802	+13,925,979	+32.7%
2500	£50,857	£57,707	+13.5%	£6,850	8,883	9,650	+8.6%	+768	117,945	127,338	+9,393	+8.0%
3000	£15,974,342	£8,313,094	-48.0%	-£7,661,248	3,140,581	1,474,425	-53.1%	-1,666,156	38,633,725	18,703,787	-19,929,938	-51.6%
Grand Total	£525,835,356	£547,460,673	+4.1%	£21,625,317	71,879,152	71,448,935	-0.6%	-430,218	891,511,966	884,799,746	-6,712,220	-0.8%

TOP 10 VOLUME LOSERS

Winemakers Choice	£2,825,833	£2,007,444	-29.0%	-£818,388	498,941	325,552	-34.8%	-173,389	6,169,474	3,828,669	-2,340,805	-37.9%
Hardys Bin Series	£1,337,064	£59,397	-95.6%	-£1,277,667	196,220	8,110	-95.9%	-188,109	2,513,841	102,009	-2,411,832	-95.9%
Versare	£2,341,523	£1,125,264	-51.9%	-£1,216,259	355,517	158,909	-55.3%	-196,607	4,296,410	1,921,549	-2,374,860	-55.3%
Signal Post	£3,268,319	£1,992,448	-39.0%	-£1,275,871	471,940	269,392	-42.9%	-202,548	6,486,300	3,698,994	-2,787,306	-43.0%
Blossom Hill	£16,433,897	£15,211,359	-7.4%	-£1,222,538	2,176,573	1,971,512	-9.4%	-205,060	24,417,152	22,047,431	-2,369,721	-9.7%
Mcguigan The Borders	£1,722,407	£1,623	-99.9%	-£1,720,784	235,707	210	-99.9%	-235,497	3,064,190	2,729	-3,061,461	-99.9%
Hardys Stamp	£6,878,055	£5,241,027	-23.8%	-£1,637,028	979,320	710,153	-27.5%	-269,167	12,630,076	9,204,472	-3,425,604	-27.1%
Jacobs Creek Classic	£10,928,062	£7,169,142	-34.4%	-£3,758,920	1,373,580	850,363	-38.1%	-523,218	17,994,739	11,146,636	-6,848,102	-38.1%
Echo Falls	£15,194,411	£11,393,886	-25.0%	-£3,800,525	2,187,174	1,564,065	-28.5%	-623,109	25,572,249	18,138,407	-7,433,842	-29.1%
Own Label	£126,370,999	£126,517,528	+0.1%	£146,529	18,782,221	17,526,193	-6.7%	-1,256,028	234,033,283	218,007,969	-16,025,314	-6.8%
Grand Total	£525,835,356	£547,460,673	+4.1%	£21,625,317	71,879,152	71,448,935	-0.6%	-430,218	891,511,966	884,799,746	-6,712,220	-0.8%

APPENDIX

- RTD



RTD - Brands

TOP 10 VOLUME WINNERS

Row Labels										Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
		Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	52wk	52wk	Variance	
Dragon Soop		£11,211,880	£13,473,174	+20.2%	£2,261,294	2,668,652	3,454,417	+29.4%	+785,764	21,349,220	27,635,334	+6,286,115	+29.4%
Gordons		£3,353,595	£5,191,803	+54.8%	£1,838,208	563,343	865,885	+53.7%	+302,542	2,816,715	4,329,424	+1,512,709	+53.7%
Venom		£0	£1,134,792	#DIV/0!	£1,134,792	0	191,088	#DIV/0!	+191,088	0	1,531,176	+1,531,176	#DIV/0!
Own Label		£1,605,302	£2,380,943	+48.3%	£775,641	288,017	460,959	+60.0%	+172,943	1,440,083	2,304,986	+864,904	+60.1%
Smirnoff		£4,391,832	£5,110,452	+16.4%	£718,620	966,844	1,122,409	+16.1%	+155,565	4,834,220	5,612,045	+777,825	+16.1%
Edinburgh Gin		£6,545	£821,124	+12446.2%	£814,579	909	104,857	+11435.4%	+103,948	5,454	629,140	+623,686	+11435.4%
Alfie		£439,308	£831,207	+89.2%	£391,899	111,455	205,245	+84.1%	+93,790	557,277	1,026,226	+468,949	+84.1%
All Shook Up		£9,236	£466,540	+4951.6%	£457,304	1,856	85,817	+4523.7%	+83,961	8,352	386,175	+377,823	+4523.7%
Wkd		£7,638,897	£8,321,586	+8.9%	£682,689	1,881,953	1,964,537	+4.4%	+82,584	7,527,813	7,858,147	+330,334	+4.4%
Captain Morgan		£505,372	£942,836	+86.6%	£437,464	84,595	152,707	+80.5%	+68,112	422,975	763,534	+340,559	+80.5%

TOP 10 VOLUME LOSERS

Jack Daniels	£146,395	£113,533	-22.4%	-£32,862	27,220	20,321	-25.3%	-6,898	136,098	101,606	-34,492	-25.3%
Sidekick	£446,371	£343,674	-23.0%	-£102,696	36,966	28,455	-23.0%	-8,511	517,524	398,368	-119,156	-23.0%
Shuda	£148,934	£153,041	+2.8%	£4,107	34,240	22,843	-33.3%	-11,397	112,787	85,543	-27,244	-24.2%
Vs	£234,120	£219,086	-6.4%	-£15,035	66,654	53,921	-19.1%	-12,732	294,329	263,951	-30,378	-10.3%
Hooch	£726,022	£689,100	-5.1%	-£36,922	183,544	170,782	-7.0%	-12,763	734,178	683,127	-51,051	-7.0%
Bacardi Breezer	£192,215	£93,946	-51.1%	-£98,270	39,739	18,614	-53.2%	-21,125	158,957	74,457	-84,500	-53.2%
Cactus Jacks	£351,658	£162,013	-53.9%	-£189,645	43,671	17,675	-59.5%	-25,997	655,068	265,118	-389,950	-59.5%
Mycocktail	£384,034	£279,218	-27.3%	-£104,816	97,982	70,085	-28.5%	-27,897	559,248	280,370	-278,878	-49.9%
Parrot Bay	£213,377	£11,395	-94.7%	-£201,982	29,876	1,147	-96.2%	-28,729	140,417	5,393	-135,025	-96.2%
Morgans	£522,998	£307,379	-41.2%	-£215,620	91,610	52,874	-42.3%	-38,735	458,049	264,372	-193,677	-42.3%
Grand Total	£42,923,594	£52,794,290	+23.0%	£9,870,697	8,881,737	10,878,098	+22.5%	+1,996,361	52,640,961	65,200,145	+12,559,184	+23.9%

APPENDIX

- Lager



Lager - Brands

TOP 15 VOLUME WINNERS

Row Labels	▼									Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
		Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	52wk	52wk	Variance	
Tennents		£64,254,685	£83,552,666	+30.0%	£19,297,981	35,897,649	39,104,840	+8.9%	+3,207,191	143,590,610	156,419,384	+12,828,774	+8.9%
Corona Extra		£15,435,827	£21,373,760	+38.5%	£5,937,933	4,899,780	6,942,046	+41.7%	+2,042,266	22,049,013	31,239,216	+9,190,202	+41.7%
Bud Light		£4,640,181	£9,368,977	+101.9%	£4,728,796	2,462,923	4,279,500	+73.8%	+1,816,577	8,620,233	14,978,253	+6,358,020	+73.8%
Heineken		£5,334,734	£10,017,909	+87.8%	£4,683,175	1,893,682	3,614,121	+90.9%	+1,720,439	9,468,413	18,070,610	+8,602,197	+90.9%
Birra Moretti		£3,790,208	£7,557,864	+99.4%	£3,767,656	1,225,355	2,503,517	+104.3%	+1,278,162	5,636,635	11,503,562	+5,866,927	+104.1%
Innis & Gunn Craft Lager		£2,920,975	£5,292,324	+81.2%	£2,371,349	1,148,623	2,063,324	+79.6%	+914,701	5,283,666	9,491,291	+4,207,625	+79.6%
Estrella Damm		£2,851,360	£4,255,502	+49.2%	£1,404,142	950,292	1,478,970	+55.6%	+528,677	5,131,580	7,986,439	+2,854,859	+55.6%
Red Stripe		£2,609,943	£3,942,395	+51.1%	£1,332,452	979,138	1,479,421	+51.1%	+500,283	4,601,949	6,953,280	+2,351,330	+51.1%
Desperados		£4,071,541	£5,957,630	+46.3%	£1,886,090	899,400	1,383,811	+53.9%	+484,412	5,306,458	8,164,486	+2,858,029	+53.9%
Amstel		£1,625,172	£2,792,213	+71.8%	£1,167,041	724,205	1,173,070	+62.0%	+448,865	2,969,243	4,809,588	+1,840,345	+62.0%
Stella Artois		£47,555,077	£53,995,904	+13.5%	£6,440,827	20,588,826	20,960,466	+1.8%	+371,641	98,826,381	100,610,257	+1,783,876	+1.8%
Hop House 13		£2,143,107	£3,097,109	+44.5%	£954,002	725,447	1,041,944	+43.6%	+316,497	3,094,608	4,447,524	+1,352,916	+43.7%
Tyskie		£6,376,231	£7,112,307	+11.5%	£736,076	2,338,155	2,643,620	+13.1%	+305,465	12,158,404	13,746,821	+1,588,418	+13.1%
Peroni Nastro Azzurro		£13,441,038	£14,340,912	+6.7%	£899,875	3,411,277	3,676,586	+7.8%	+265,308	17,397,518	18,750,591	+1,353,073	+7.8%
Menabrea Bionda		£310,270	£1,118,633	+260.5%	£808,363	91,667	345,295	+276.7%	+253,628	440,000	1,657,415	+1,217,415	+276.7%

TOP 10 VOLUME LOSERS

Tennents Black T Lager	£676,787	£61,943	-90.8%	-£614,843	242,934	18,651	-92.3%	-224,283	1,141,791	87,662	-1,054,130	-92.3%
Carlsberg Export	£1,808,353	£1,403,673	-22.4%	-£404,680	752,609	527,724	-29.9%	-224,885	3,612,524	2,533,074	-1,079,450	-29.9%
Coors Light	£11,415,674	£11,870,050	+4.0%	£454,377	5,575,172	5,272,599	-5.4%	-302,573	23,415,725	22,144,918	-1,270,806	-5.4%
Carlsberg	£7,204,711	£7,156,707	-0.7%	-£48,004	3,968,792	3,568,647	-10.1%	-400,145	15,081,411	13,560,859	-1,520,552	-10.1%
Becks	£5,914,684	£4,853,167	-17.9%	-£1,061,517	2,201,055	1,790,301	-18.7%	-410,754	10,565,065	8,593,448	-1,971,617	-18.7%
Carlsberg Special Brew	£5,204,206	£3,092,345	-40.6%	-£2,111,861	1,162,258	662,914	-43.0%	-499,344	10,227,872	5,833,646	-4,394,226	-43.0%
Budweiser	£53,890,950	£58,123,263	+7.9%	£4,232,313	23,502,043	22,948,370	-2.4%	-553,673	105,759,208	103,267,678	-2,491,530	-2.4%
Own Label	£4,433,763	£3,562,169	-19.7%	-£871,594	2,520,665	1,597,337	-36.6%	-923,328	6,254,147	3,961,193	-2,292,954	-36.7%
Miller Genuine Draft	£6,714,344	£4,145,887	-38.3%	-£2,568,458	2,622,027	1,535,087	-41.5%	-1,086,939	12,323,527	7,214,911	-5,108,616	-41.5%
Carling	£11,969,347	£12,792,702	+6.9%	£823,355	7,764,642	6,476,746	-16.6%	-1,287,896	31,617,024	25,997,590	-5,619,434	-17.8%
Grand Total	£360,914,144	£419,738,288	+16.3%	£58,824,144	159,126,046	167,572,595	+5.3%	+8,446,549	702,171,777	736,813,163	+34,641,385	+4.9%

Lager - Segment & Pack Size Performance

Row Labels	Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	Alc Units LY 52wk	Alc Units TY 52wk	Alc Units Variance	Alc Units %CHG
Premium	£221,351,886	£257,008,298	+16.1%	£35,656,411	85,175,677	92,409,190	+8.5%	+7,233,514	403,700,035	437,508,380	+33,808,345	+8.4%
Standard	£122,673,669	£147,304,549	+20.1%	£24,630,879	68,251,800	69,739,497	+2.2%	+1,487,697	271,106,636	277,008,208	+5,901,572	+2.2%
Nab/Lab	£3,218,354	£4,414,912	+37.2%	£1,196,559	1,609,558	2,169,873	+34.8%	+560,315	141,720	202,340	+60,620	+42.8%
Assorted	£122,773	£263,183	+114.4%	£140,410	31,009	74,616	+140.6%	+43,606	144,267	361,817	+217,550	+150.8%
Commodity	£1,506,884	£1,203,161	-20.2%	-£303,723	1,073,351	857,970	-20.1%	-215,380	3,002,004	2,464,649	-537,355	-17.9%
Super	£12,040,577	£9,544,186	-20.7%	-£2,496,391	2,984,652	2,321,449	-22.2%	-663,202	24,077,116	19,267,769	-4,809,346	-20.0%
Grand Total	£360,914,144	£419,738,288	+16.3%	£58,824,144	159,126,046	167,572,595	+5.3%	+8,446,549	702,171,777	736,813,163	+34,641,385	+4.9%

Row Labels	Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	Alc Units LY 52wk	Alc Units TY 52wk	Alc Units Variance	Alc Units %CHG
15	£12,710,573	£38,998,988	+206.8%	£26,288,415	6,791,829	18,547,251	+173.1%	+11,755,422	27,516,508	75,628,529	+48,112,021	+174.8%
4	£129,339,365	£155,745,286	+20.4%	£26,405,921	48,549,717	58,626,155	+20.8%	+10,076,437	224,783,219	266,381,824	+41,598,605	+18.5%
10	£29,974,827	£49,912,425	+66.5%	£19,937,597	14,905,861	22,137,029	+48.5%	+7,231,168	62,882,810	93,962,590	+31,079,779	+49.4%
12	£52,046,908	£64,352,254	+23.6%	£12,305,346	23,558,503	26,130,084	+10.9%	+2,571,581	102,980,742	115,032,851	+12,052,109	+11.7%
1	£37,212,325	£44,111,018	+18.5%	£6,898,693	11,328,123	13,642,647	+20.4%	+2,314,525	54,880,468	65,453,843	+10,573,375	+19.3%
6	£16,768,281	£18,141,013	+8.2%	£1,372,732	6,077,043	6,430,374	+5.8%	+353,330	25,927,240	26,966,836	+1,039,596	+4.0%
3	£2,807,063	£3,368,614	+20.0%	£561,551	576,088	684,096	+18.7%	+108,008	3,378,887	3,975,812	+596,925	+17.7%
30	£0	£47,303	#DIV/0!	£47,303	0	23,324	#DIV/0!	+23,324	0	104,960	+104,960	#DIV/0!
5	£0	£23,024	#DIV/0!	£23,024	0	18,245	#DIV/0!	+18,245	0	160,559	+160,559	#DIV/0!
2	£59,966	£408	-99.3%	-£59,558	17,729	116	-99.3%	-17,613	90,357	492	-89,865	-99.5%
8	£13,704,425	£12,886,960	-6.0%	-£817,465	5,986,308	5,469,509	-8.6%	-516,800	24,373,334	21,524,262	-2,849,072	-11.7%
24	£5,443,702	£3,916,041	-28.1%	-£1,527,661	3,258,470	1,806,396	-44.6%	-1,452,074	14,657,170	8,126,972	-6,530,198	-44.6%
18	£18,703,802	£15,152,038	-19.0%	-£3,551,765	11,008,443	7,695,080	-30.1%	-3,313,363	48,282,881	32,703,127	-15,579,754	-32.3%
20	£42,142,907	£13,082,918	-69.0%	-£29,059,989	27,067,931	6,362,289	-76.5%	-20,705,643	112,418,160	26,790,506	-85,627,654	-76.2%
Grand Total	£360,914,144	£419,738,288	+16.3%	£58,824,144	159,126,046	167,572,595	+5.3%	+8,446,549	702,171,777	736,813,163	+34,641,385	+4.9%

APPENDIX

- Ale & Stout



Ale - Brands

TOP 10 VOLUME WINNERS

Row Labels										Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
		Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	52wk	52wk	Variance	
Mcewans Export		£8,482,033	£10,592,225	+24.9%	£2,110,192	3,757,873	4,383,331	+16.6%	+625,458	16,910,430	19,724,991	+2,814,561	+16.6%
Newcastle Brown Ale		£1,194,648	£1,946,902	+63.0%	£752,254	382,512	633,850	+65.7%	+251,339	1,797,805	2,979,097	+1,181,291	+65.7%
Belhaven Best		£1,649,251	£2,104,663	+27.6%	£455,412	788,539	1,001,566	+27.0%	+213,027	2,759,887	3,505,482	+745,594	+27.0%
Brewdog Elvis Juice		£550,663	£1,428,996	+159.5%	£878,333	99,570	295,291	+196.6%	+195,721	647,202	1,919,390	+1,272,187	+196.6%
Brewdog Punk Ipa		£4,649,913	£5,122,036	+10.2%	£472,123	1,097,120	1,236,816	+12.7%	+139,697	6,143,871	6,926,171	+782,300	+12.7%
Brewdog Indie Pale Ale		£19,103	£469,783	+2359.2%	£450,679	4,553	118,795	+2509.2%	+114,242	19,123	498,940	+479,817	+2509.2%
Tennents Special Ale		£1,505,196	£1,745,089	+15.9%	£239,893	816,309	925,293	+13.4%	+108,984	2,857,082	3,238,525	+381,443	+13.4%
Sharps Doom Bar		£402,143	£592,047	+47.2%	£189,904	120,607	193,638	+60.6%	+73,031	518,610	832,644	+314,034	+60.6%
Inveralmond Edinburgh Pale Ale		£49,342	£291,829	+491.4%	£242,487	13,476	78,998	+486.2%	+65,522	51,209	300,191	+248,982	+486.2%
Michelob Ultra		£0	£140,678	#DIV/0!	£140,678	0	55,038	#DIV/0!	+55,038	0	231,158	+231,158	#DIV/0!
Brewdog Clockwork		£20,471	£295,616	+1344.0%	£275,145	3,609	53,954	+1394.9%	+50,345	16,241	242,792	+226,551	+1394.9%

TOP 10 VOLUME LOSERS

Bitter & Twisted	£426,251	£312,811	-26.6%	£-113,440	121,759	88,020	-27.7%	£-33,739	511,390	369,684	£-141,706	-27.7%
Innis & Gunn Oak Aged Beer	£538,509	£372,456	-30.8%	£-166,053	124,676	88,168	-29.3%	£-36,508	822,861	581,911	£-240,950	-29.3%
Crabbies Orgnl Alchlic Ginger Beer	£1,432,568	£1,321,620	-7.7%	£-110,948	428,399	384,157	-10.3%	£-44,242	2,056,316	1,843,953	£-212,364	-10.3%
Own Label	£742,131	£822,748	+10.9%	£80,617	472,600	425,378	-10.0%	£-47,221	1,181,499	1,063,446	£-118,053	-10.0%
Abbot Ale	£343,500	£247,521	-27.9%	£-95,979	143,027	93,795	-34.4%	£-49,232	715,137	468,975	£-246,162	-34.4%
Brewdog Dog Pack	£788,656	£635,742	-19.4%	£-152,913	189,746	136,975	-27.8%	£-52,771	1,138,479	821,851	£-316,628	-27.8%
Caesar Augustus	£972,823	£776,609	-20.2%	£-196,214	280,780	222,712	-20.7%	£-58,068	1,151,197	913,119	£-238,078	-20.7%
Boddingtons Draught	£420,901	£328,975	-21.8%	£-91,926	236,939	172,333	-27.3%	£-64,606	829,286	603,166	£-226,120	-27.3%
Old Speckled Hen	£1,372,228	£1,207,077	-12.0%	£-165,151	513,798	443,555	-13.7%	£-70,243	2,568,990	2,195,109	£-373,881	-14.6%
Old Golden Hen	£330,645	£103,961	-68.6%	£-226,684	250,161	59,044	-76.4%	£-191,117	1,025,659	242,080	£-783,579	-76.4%
Grand Total	£56,392,087	£64,358,463	+14.1%	£7,966,377	19,846,834	21,571,820	+8.7%	+1,724,986	89,321,321	97,619,473	+8,298,152	+9.3%

Stout - Brands

TOP 10 VOLUME WINNERS

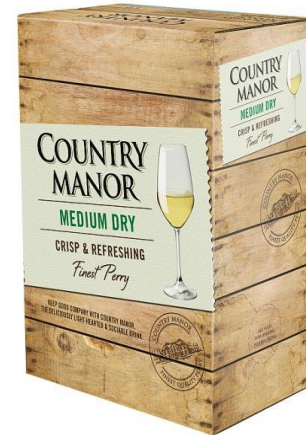
Row Labels										Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
		Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	52wk	52wk	Variance	
Sweetheart Stout		£568,382	£711,023	+25.1%	£142,641	280,052	335,484	+19.8%	+55,432	560,103	670,967	+110,864	+19.8%
Guinness Draught		£7,441,050	£8,081,836	+8.6%	£640,786	3,184,995	3,223,821	+1.2%	+38,826	13,330,070	13,502,695	+172,625	+1.3%
Guinness West Indies Porter		£254,391	£399,051	+56.9%	£144,661	76,438	102,537	+34.1%	+26,099	458,628	615,220	+156,592	+34.1%
Guinness Original		£969,572	£997,921	+2.9%	£28,348	375,377	385,372	+2.7%	+9,995	1,547,144	1,594,508	+47,364	+3.1%
Guinness Mid Strength		£82,458	£95,567	+15.9%	£13,109	41,832	48,427	+15.8%	+6,595	117,130	135,595	+18,465	+15.8%
Vocation Yeasty Boys		£0	£35,007	#DIV/0!	£35,007	0	5,576	#DIV/0!	+5,576	0	36,242	+36,242	#DIV/0!
Guinness Milk Stout		£65,102	£75,410	+15.8%	£10,309	19,556	24,089	+23.2%	+4,533	97,780	120,445	+22,664	+23.2%
March Of The Penguins		£22,399	£36,862	+64.6%	£14,463	6,440	10,605	+64.7%	+4,165	28,982	47,722	+18,740	+64.7%
Loch Ness Dark Ness Black Stout		£3,662	£13,130	+258.5%	£9,468	800	3,863	+382.9%	+3,063	4,000	19,314	+15,314	+382.9%
Fourpure Oatmeal Stout		£1,469	£16,598	+1029.6%	£15,128	272	3,146	+1057.0%	+2,874	1,387	16,046	+14,659	+1057.0%

TOP 10 VOLUME LOSERS

Brewdog Jet Black Heart	£117,767	£97,198	-17.5%	£-20,568	22,565	22,303	-1.2%	-262	106,057	104,824	-1,233	-1.2%
Broughton Dark Dunter Stout	£5,877	£4,924	-16.2%	£-954	1,620	1,349	-16.7%	-271	7,774	6,473	-1,301	-16.7%
Black Sheep Chocolate Orange Stout	£3,635	£541	-85.1%	£-3,095	1,336	159	-88.1%	-1,177	5,878	700	-5,179	-88.1%
Greene King Mocha Stout	£3,275	£0	-100.0%	£-3,275	1,351	0	-100.0%	-1,351	6,080	0	-6,080	-100.0%
Redwell Kofra Stout	£10,735	£12	-99.9%	£-10,724	1,972	3	-99.8%	-1,969	11,635	19	-11,616	-99.8%
Guinness Antwerpen	£14,770	£7	-100.0%	£-14,763	2,790	2	-99.9%	-2,789	22,324	13	-22,311	-99.9%
Cairngorm Black Gold	£100,181	£75,981	-24.2%	£-24,200	28,998	21,235	-26.8%	-7,763	127,592	93,434	-34,158	-26.8%
Guinness Dublin Porter	£39,063	£30	-99.9%	£-39,033	12,335	9	-99.9%	-12,327	46,874	33	-46,841	-99.9%
Belhaven Black	£186,033	£157,213	-15.5%	£-28,821	65,124	51,641	-20.7%	-13,483	273,520	216,892	-56,628	-20.7%
Murphys Draught	£239,697	£214,673	-10.4%	£-25,025	111,826	93,736	-16.2%	-18,089	447,302	374,945	-72,357	-16.2%
Grand Total	£10,341,137	£11,280,766	+9.1%	£939,629	4,289,478	4,399,719	+2.6%	+110,241	17,467,923	17,877,862	+409,939	+2.3%

APPENDIX

- Perry



Perry - Brand

Row Labels	Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	Alc Units LY 52wk	Alc Units TY 52wk	Alc Units Variance	Alc Units %CHG
Own Label	£41,396	£230,570	+457.0%	£189,174	21,975	61,287	+178.9%	+39,312	54,937	153,218	+98,281	+178.9%
Chardolini	£31,633	£116,975	+269.8%	£85,342	19,830	39,637	+99.9%	+19,807	148,725	297,276	+148,551	+99.9%
Charlemagne	£1,358	£1,799	+32.4%	£440	345	454	+31.6%	+109	2,590	3,409	+819	+31.6%
Rekorderlig Botanicals Grpfrt Rosmry	£0	£466	#DIV/0!	£466	0	77	#DIV/0!	+77	0	308	+308	#DIV/0!
Bellino Bianco	£0	£4	#DIV/0!	£4	0	1	#DIV/0!	+1	0	4	+4	#DIV/0!
Bellabrusco Bianco	£42	£0	-100.0%	-£42	17	0	-100.0%	-17	130	0	-130	-100.0%
Lambrini Luci	£29	£0	-100.0%	-£29	21	0	-100.0%	-21	158	0	-158	-100.0%
Champs De La Fontaine Spumante	£61	£0	-100.0%	-£61	74	0	-100.0%	-74	551	0	-551	-100.0%
Lambrucini	£83	£0	-100.0%	-£83	93	0	-100.0%	-93	698	0	-698	-100.0%
Westons Vintage Perry	£38,647	£42,493	+10.0%	£3,846	11,693	11,560	-1.1%	-133	87,694	86,700	-994	-1.1%
Fastini Gold Spumante	£848	£0	-100.0%	-£848	220	0	-100.0%	-220	1,651	0	-1,651	-100.0%
Lambrini Celebrini	£1,018	£0	-100.0%	-£1,018	511	0	-100.0%	-511	3,831	0	-3,831	-100.0%
Le Peri	£1,949	£0	-100.0%	-£1,949	1,185	0	-100.0%	-1,185	8,888	0	-8,888	-100.0%
Babycham Original	£145,446	£121,832	-16.2%	-£23,615	37,070	31,805	-14.2%	-5,266	278,028	238,536	-39,492	-14.2%
Cassini Bianco	£13,971	£19	-99.9%	-£13,952	6,818	8	-99.9%	-6,810	51,139	61	-51,077	-99.9%
Chateau Chaumet	£36,814	£2	-100.0%	-£36,812	14,658	2	-100.0%	-14,656	109,935	11	-109,923	-100.0%
Lamcello Perfectly Posh Pink Perry	£108,716	£80,164	-26.3%	-£28,552	54,359	21,618	-60.2%	-32,741	407,689	162,133	-245,556	-60.2%
Le Soleil	£278,660	£249,615	-10.4%	-£29,045	172,560	89,907	-47.9%	-82,653	1,294,200	674,303	-619,898	-47.9%
Country Manor	£1,040,333	£280,270	-73.1%	-£760,063	574,634	113,117	-80.3%	-461,517	4,309,754	848,376	-3,461,378	-80.3%
Lambrini	£5,742,643	£5,373,110	-6.4%	-£369,534	2,499,195	1,754,060	-29.8%	-745,135	18,731,676	12,319,422	-6,412,255	-34.2%
Grand Total	£7,483,648	£6,497,317	-13.2%	-£986,331	3,415,257	2,123,532	-37.8%	-1,291,725	25,492,272	14,783,756	-10,708,516	-42.0%

Headline Volume Impacts



CIDER

- Cider is the hardest hit segment as a consequence of MUP with Volume decline across many Brands [e.g. Strongbow 5% ABV, Frosty Jacks 7.5% ABV, Stella Cidre ABV 4.5%] Retailer Exclusive Brands [e.g. Tesco Crofters 5% ABV, Asda Hawksridge 4.2% ABV] and Retailer Own Label. This Volume decline has removed 44.4M Units of Alcohol from the Scottish Market.
- MUP has lead to the collapse of the PET format [-52%] indiscriminately across Brands, Retailer Exclusive Brands and Retailer Own Brands (ABV's ranging from 4.2% ABV to 7.5% ABV)
- MUP precipitated the removal of 18pks/20pks of Mainstream brands from retailer ranges (e.g. Strongbow) as prices were forced near to or over £20. With the intention of hitting more attractive on-shelf price points retailers and manufacturers focus has shifted to mid-packs (10pk/12pk).

CIDER (cont)

- Frosty Jacks Volumes have tumbled by -73% vs LY, Strongbow by -12%, Own Label by -42%, Crofters (Tesco Exclusive) by -67% whilst the Fruit Ciders such as Strongbow Dark Fruit +46% and Kopparberg Strawberry & Lime +23% witnessed the strongest gains.
- Other brands that accelerated their volume growth include those on the higher ABV spectrum across Can and Glass Bottle such as K Cider Can (8% ABV, +14% growth) and the Thatchers Vintage (7.5% ABV, +157% growth) and Westons Vintage (8.2% ABV, +9.4% Growth).
- Woodpecker Cider (3.5% ABV) was the 4th fastest growing brand in Scotland adding +1.5kHL across its Can and, to a lesser extent, its PET format.

APPENDIX

- Cider



Cider – Pack Type / Count

Row Labels										Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
		Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	52wk	52wk	Variance	
⊞ Btl		£32,708,038	£34,322,624	+4.9%	£1,614,586	9,323,856	9,790,306	+5.0%	+466,451	42,679,602	44,776,482	+2,096,880	+4.9%
⊞ Can		£73,887,332	£87,983,866	+19.1%	£14,096,534	33,776,952	33,918,564	+0.4%	+141,612	161,902,469	160,712,119	-1,190,351	-0.7%
10		£19,256,591	£26,970,047	+40.1%	£7,713,456	8,140,563	10,860,541	+33.4%	+2,719,978	33,996,569	46,467,685	+12,471,116	+36.7%
4		£31,815,210	£42,373,132	+33.2%	£10,557,922	13,097,061	15,523,474	+18.5%	+2,426,412	65,100,550	77,617,158	+12,516,608	+19.2%
15		£1,171,187	£2,759,862	+135.6%	£1,588,674	639,032	1,267,226	+98.3%	+628,194	2,837,596	5,456,686	+2,619,089	+92.3%
18		£1,986,781	£3,507,535	+76.5%	£1,520,754	1,487,447	1,839,914	+23.7%	+352,467	6,938,755	8,834,754	+1,895,998	+27.3%
6		£486,928	£955,931	+96.3%	£469,003	125,309	277,327	+121.3%	+152,018	744,187	1,485,221	+741,034	+99.6%
24		£0	£21,021	#DIV/0!	£21,021	0	126,126	#DIV/0!	+126,126	0	1,009,008	+1,009,008	#DIV/0!
8		£540,992	£28,481	-94.7%	-£512,512	222,232	37,954	-82.9%	-184,278	1,083,651	170,824	-912,827	-84.2%
12		£7,560,344	£7,429,878	-1.7%	-£130,466	3,643,704	2,844,704	-21.9%	-799,000	17,282,010	13,280,284	-4,001,725	-23.2%
1		£5,334,393	£3,932,246	-26.3%	-£1,402,147	2,093,991	1,137,416	-45.7%	-956,575	12,507,146	6,371,245	-6,135,901	-49.1%
20		£5,734,905	£5,733	-99.9%	-£5,729,172	4,327,612	3,881	-99.9%	-4,323,731	21,412,004	19,254	-21,392,750	-99.9%
⊞ Keg		£303,274	£1,580,511	+421.1%	£1,277,238	90,529	545,052	+502.1%	+454,523	397,869	2,195,132	+1,797,263	+451.7%
⊞ PET		£22,935,907	£14,917,593	-35.0%	-£8,018,314	15,775,099	6,864,533	-56.5%	-8,910,566	94,353,300	35,049,162	-59,304,138	-62.9%
⊞ Carton		£20,486	£4,121	-79.9%	-£16,365	7,377	1,571	-78.7%	-5,806	32,684	7,868	-24,816	-75.9%
⊞ Bag-in-Box		£190,156	£166,633	-12.4%	-£23,524	103,981	55,233	-46.9%	-48,748	595,452	286,746	-308,706	-51.8%
⊞ Frozen Pouch		£6,659	£0	-100.0%	-£6,659	746	0	-100.0%	-746	2,983	0	-2,983	-100.0%
Grand Total		£130,051,853	£138,975,348	+6.9%	£8,923,496	59,078,539	51,175,260	-13.4%	-7,903,279	299,964,359	243,027,509	-56,936,851	-19.0%

Cider - Brand

TOP 10 VOLUME WINNERS

Row Labels										Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
		Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	52wk	52wk	Variance	
Strongbow Dark Fruit		£18,741,721	£25,897,960	+38.2%	£7,156,238	7,178,512	10,015,552	+39.5%	+2,837,040	28,714,055	40,062,218	+11,348,163	+39.5%
Kopparberg Strawberry & Lime		£7,219,644	£8,803,634	+21.9%	£1,583,991	2,035,061	2,518,199	+23.7%	+483,138	8,140,245	10,072,796	+1,932,552	+23.7%
Magners Original		£9,773,821	£11,972,613	+22.5%	£2,198,792	4,905,606	5,141,191	+4.8%	+235,586	22,075,227	23,135,364	+1,060,137	+4.8%
Woodpecker		£58,843	£548,007	+831.3%	£489,164	28,103	244,979	+771.7%	+216,876	98,362	857,427	+759,066	+771.7%
Thatchers Gold		£1,080,469	£1,692,749	+56.7%	£612,280	510,798	703,819	+37.8%	+193,021	2,451,833	3,378,333	+926,500	+37.8%
K Cider		£4,229,168	£5,712,073	+35.1%	£1,482,905	1,619,641	1,807,219	+11.6%	+187,578	12,957,125	14,457,748	+1,500,624	+11.6%
Strongbow Cloudy Apple		£319,080	£657,026	+105.9%	£337,946	131,973	288,927	+118.9%	+156,954	593,880	1,300,172	+706,292	+118.9%
Bulmers Original		£838,845	£1,264,959	+50.8%	£426,114	319,724	459,989	+43.9%	+140,265	1,438,758	2,069,949	+631,191	+43.9%
Bulmers Red Berries & Lime Cider		£1,313,871	£1,630,692	+24.1%	£316,821	354,444	456,204	+28.7%	+101,760	1,417,776	1,824,817	+407,041	+28.7%
Thatchers Somerset Haze		£9,388	£231,589	+2366.7%	£222,200	5,148	103,959	+1919.4%	+98,811	23,166	467,817	+444,651	+1919.4%

TOP 10 VOLUME LOSERS

Aston Manor Farmhouse Dry Cider	£378,002	£60,208	-84.1%	-£317,794	254,905	40,024	-84.3%	-214,881	1,019,622	160,096	-859,526	-84.3%
White Ace	£421,066	£2,308	-99.5%	-£418,757	316,591	1,736	-99.5%	-314,855	2,374,431	13,017	-2,361,414	-99.5%
Carling Black Fruits Cider	£1,247,027	£591,085	-52.6%	-£655,942	618,152	270,756	-56.2%	-347,396	2,472,606	1,083,023	-1,389,583	-56.2%
Carling British Cider	£952,757	£273,619	-71.3%	-£679,138	645,714	131,026	-79.7%	-514,687	2,905,712	589,619	-2,316,093	-79.7%
Hcc Black Cider	£1,863,529	£981,957	-47.3%	-£881,572	934,299	342,920	-63.3%	-591,379	7,007,242	2,571,898	-4,435,344	-63.3%
Omega White Cider	£1,229,380	£94,728	-92.3%	-£1,134,652	850,281	66,937	-92.1%	-783,344	6,377,107	502,028	-5,875,080	-92.1%
Crofters Apple Cider	£1,274,642	£828,186	-35.0%	-£446,456	1,228,823	377,385	-69.3%	-851,437	6,144,113	1,886,927	-4,257,186	-69.3%
Own Label	£5,384,338	£4,609,628	-14.4%	-£774,710	3,635,138	1,917,766	-47.2%	-1,717,371	9,087,845	4,794,416	-4,293,429	-47.2%
Strongbow	£25,217,772	£30,534,471	+21.1%	£5,316,699	14,449,617	12,719,315	-12.0%	-1,730,301	72,248,088	63,596,586	-8,651,503	-12.0%
Frosty Jacks	£9,492,896	£2,465,426	-74.0%	-£7,027,469	6,353,744	1,587,768	-75.0%	-4,765,976	49,836,386	12,173,320	-37,663,066	-75.6%
Grand Total	£130,051,853	£138,975,348	+6.9%	£8,923,496	59,078,539	51,175,260	-13.4%	-7,903,279	299,964,359	243,027,509	-56,936,851	-19.0%

Cider - SKU

TOP 10 VOLUME WINNERS

Row Labels										Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
		Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	52wk	52wk	Variance	
Strongbow Can 4ct 568ml Cider Cider Calaalst		£1,609,056	£5,110,205	+217.6%	£3,501,149	696,565	2,030,683	+191.5%	+1,334,118	3,482,824	10,153,418	+6,670,594	+191.5%
Strongbow Can 4ct 440ml Cider Cider Calaalst		£2,102,158	£5,361,131	+155.0%	£3,258,973	922,816	2,108,047	+128.4%	+1,185,231	4,614,081	10,540,240	+5,926,159	+128.4%
Strongbow Can 10ct 440ml Cider Cider Calaalst		£1,903,692	£5,089,351	+167.3%	£3,185,659	926,231	2,086,408	+125.3%	+1,160,177	4,631,153	10,432,038	+5,800,884	+125.3%
Strongbow Dark Fruit Can 10ct 440ml Cider Cider Calaalst		£8,807,659	£11,111,069	+26.2%	£2,303,410	3,729,571	4,731,571	+26.9%	+1,002,000	14,918,288	18,926,288	+4,008,000	+26.9%
Strongbow Dark Fruit Can 15ct 440ml Cider Cider Calaalst		£160,587	£1,599,676	+896.1%	£1,439,089	80,969	767,818	+848.3%	+686,849	323,875	3,071,270	+2,747,395	+848.3%
Strongbow Can 18ct 440ml Cider Cider Calaalst		£651,090	£2,014,289	+209.4%	£1,363,199	490,486	1,110,282	+126.4%	+619,796	2,452,428	5,551,410	+3,098,982	+126.4%
Strongbow Dark Fruit Can 4ct 568ml Cider Cider Calaalst		£590,066	£1,748,593	+196.3%	£1,158,528	205,992	610,538	+196.4%	+404,546	823,967	2,442,151	+1,618,184	+196.4%
Strongbow Dark Fruit Can 4ct 440ml Cider Cider Calaalst		£9,029,000	£10,297,092	+14.0%	£1,268,092	3,111,767	3,486,321	+12.0%	+374,554	12,447,074	13,945,290	+1,498,217	+12.0%
Strongbow Dark Fruit Keg 1ct 5000ml Cider Cider Calaalst		£53,166	£1,015,496	+1810.0%	£962,330	16,011	378,950	+2266.8%	+362,939	64,045	1,515,799	+1,451,754	+2266.8%
Magners Original Can 4ct 500ml Cider Cider Calaalst		£1,130,933	£2,062,461	+82.4%	£931,527	483,727	840,209	+73.7%	+356,482	2,176,772	3,780,941	+1,604,169	+73.7%

TOP 10 VOLUME LOSERS

Magners Original Can 20ct 440ml Cider Cider Calaalst	£424,951	£145	-100.0%	-£424,805	338,747	97	-100.0%	-338,650	1,524,362	436	-1,523,927	-100.0%
Omega White Cider Plasbott 1ct 3000ml Cider Cider Calaalst	£570,393	£54,885	-90.4%	-£515,508	428,961	41,267	-90.4%	-387,694	3,217,205	309,502	-2,907,703	-90.4%
Own Label Can 4ct 440ml Cider Cider Calaalst	£1,203,451	£733,809	-39.0%	-£469,642	896,290	373,163	-58.4%	-523,127	2,240,726	932,909	-1,307,817	-58.4%
Own Label Plasbott 1ct 2000ml Cider Cider Calaalst	£1,593,702	£1,624,267	+1.9%	£30,565	1,200,066	658,684	-45.1%	-541,383	3,000,165	1,646,709	-1,353,457	-45.1%
Hcc Black Cider Can 1ct 500ml Cider Cider Calaalst	£1,856,113	£956,062	-48.5%	-£900,051	930,198	327,626	-64.8%	-602,572	6,976,483	2,457,194	-4,519,289	-64.8%
Strongbow Can 12ct 440ml Cider Cider Calaalst	£3,558,267	£3,344,386	-6.0%	-£213,881	2,156,171	1,424,990	-33.9%	-731,181	10,780,853	7,124,951	-3,655,903	-33.9%
Crofters Apple Cider Plasbott 1ct 2000ml Cider Cider Calaalst	£1,274,642	£828,186	-35.0%	-£446,456	1,228,823	377,385	-69.3%	-851,437	6,144,113	1,886,927	-4,257,186	-69.3%
Strongbow Can 4ct 500ml Cider Cider Calaalst	£3,406,811	£134,986	-96.0%	-£3,271,825	1,496,121	56,093	-96.3%	-1,440,028	7,480,604	280,464	-7,200,140	-96.3%
Strongbow Can 20ct 440ml Cider Cider Calaalst	£5,159,554	£5,288	-99.9%	-£5,154,265	3,875,503	3,582	-99.9%	-3,871,921	19,377,515	17,908	-19,359,607	-99.9%
Frosty Jacks Plasbott 1ct 3000ml Cider Cider Calaalst	£7,700,559	£1,072,214	-86.1%	-£6,628,345	5,441,014	802,780	-85.2%	-4,638,233	42,991,943	6,286,246	-36,705,696	-85.4%
Grand Total	£130,051,853	£138,975,348	+6.9%	£8,923,496	59,078,539	51,175,260	-13.4%	-7,903,279	299,964,359	243,027,509	-56,936,851	-19.0%

Cider - Manufacturer

TOP 5 VOLUME WINNERS

Row Labels										Alc Units LY	Alc Units TY	Alc Units	Alc Units %CHG
		Val LY 52wk	Val TY 52wk	Val %CHG	Val Variance	Vol LY 52wk	Vol TY 52wk	Vol %CHG	Vol Variance	52wk	52wk	Variance	
Heineken Uk		£52,245,332	£66,882,604	+28.0%	£14,637,272	24,510,178	26,272,532	+7.2%	+1,762,354	115,222,956	120,434,630	+5,211,673	+4.5%
Kopparberg Cider Of Sweden Ltd		£19,807,401	£21,867,416	+10.4%	£2,060,015	5,624,213	6,359,876	+13.1%	+735,663	21,574,426	24,156,899	+2,582,473	+12.0%
Thatchers Cider Co Ltd		£1,870,770	£3,299,678	+76.4%	£1,428,908	760,681	1,241,517	+63.2%	+480,836	3,963,707	6,432,378	+2,468,671	+62.3%
C&C Group Plc		£16,178,869	£19,455,782	+20.3%	£3,276,912	7,489,694	7,560,958	+1.0%	+71,264	40,344,502	40,565,673	+221,171	+0.5%
H Weston & Sons Ltd		£3,788,321	£4,539,501	+19.8%	£751,179	1,087,623	1,136,003	+4.4%	+48,381	8,324,182	8,670,169	+345,987	+4.2%

TOP 5 VOLUME LOSERS

Corinthian Brands Ltd	£2,324,912	£1,798,540	-22.6%	-£526,372	1,119,371	585,420	-47.7%	-533,951	7,946,008	4,054,989	-3,891,018	-49.0%
Malt House Vintners	£1,229,380	£94,728	-92.3%	-£1,134,652	850,281	66,937	-92.1%	-783,344	6,377,107	502,028	-5,875,080	-92.1%
Molson Coors Uk	£6,325,724	£4,749,337	-24.9%	-£1,576,386	2,333,397	1,376,149	-41.0%	-957,248	9,980,631	5,880,741	-4,099,891	-41.1%
Own Label	£5,805,404	£4,611,936	-20.6%	-£1,193,468	3,951,729	1,919,502	-51.4%	-2,032,227	11,462,276	4,807,433	-6,654,843	-58.1%
Aston Manor Brewery Ltd	£12,369,228	£4,405,476	-64.4%	-£7,963,752	8,718,867	2,484,886	-71.5%	-6,233,981	61,111,514	16,467,938	-44,643,576	-73.1%
Grand Total	£130,051,853	£138,975,348	+6.9%	£8,923,496	59,078,539	51,175,260	-13.4%	-7,903,279	299,964,359	243,027,509	-56,936,851	-19.0%