



Balanced Ranging on Draught Beer and Cider Introduction to Madri (World Lager)



Meet The Team



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Agenda

Context:

Consumer Outlook

Ranging

Choosing the brands that are best suited

Ranging Examples

Introduction to Madri



59%

of GB consumers agree that they
“can’t wait to go out again”

*26% of GB consumers
strongly agree with this statement
Only 18% disagree*



PROFESSIONAL DATA EXPERIMENTAL

Given the pent-up demand for out of home eating and drinking out experiences, over half the population predict they will revisit reopened venues in the first few weeks

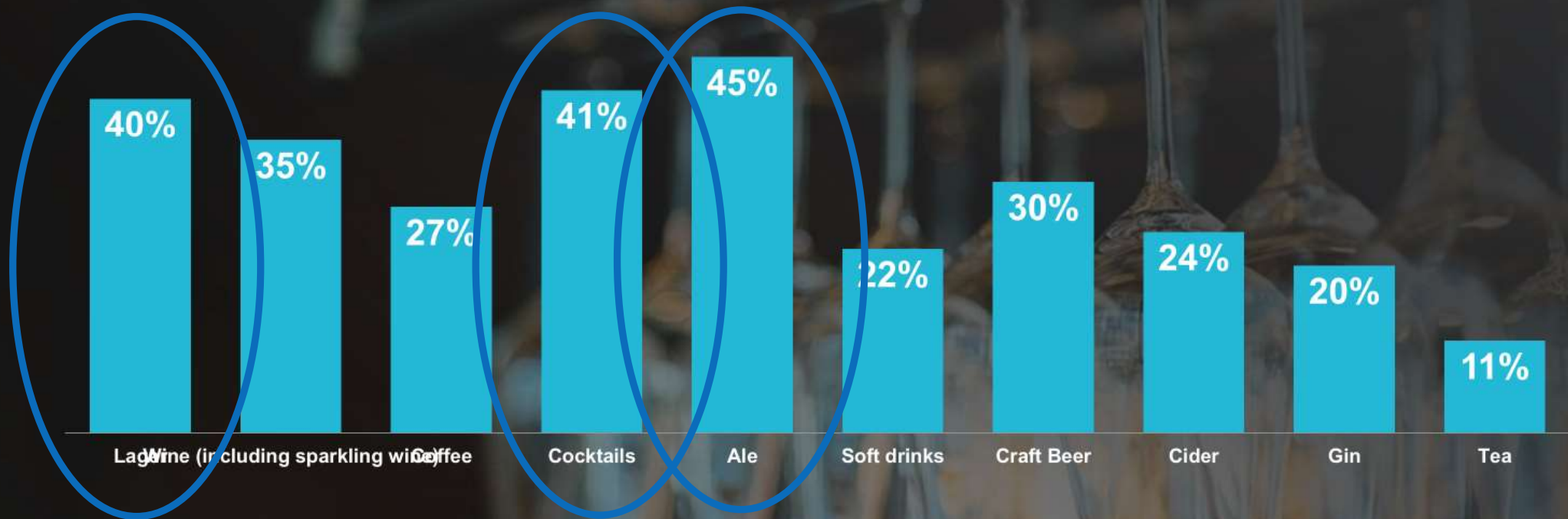
51%

Of GB stated they would return to a venue within the first few weeks of it reopening



Serves that are difficult to recreate at home, such as cocktails and ale, have been missed the most by consumers who typically drink them out

Proportion of typical category drinkers who are most looking forward to drinking this category out again:
(e.g. 40% of typical OOH lager consumers are most looking forward to drinking lager out again)



Key Focus Areas for Re-Opening:

SAFETY FIRST



Educate your guests regarding what to expect at your outlet(s) and reassure them that their safety and wellbeing is being taken care of. Safety continues to be a key concern for consumers, so you cannot do too much to offer reassurance to existing and potential guests.

DRIVING FOOTFALL



Give people reasons to visit and adapt your offer to unlock new occasions. Reasons to visit could include championing existing events and/or running promotions to encourage people to visit at quieter times.

MAXIMISING SPEND



Think creatively to ensure that opportunities to allow guests to spend are maximised. Examples could include having a takeaway offer, optimising menu features, running offers which encourage trade up and/or drinks & food matching etc.

MEMORABLE EXPERIENCES



Making the best of the new rules & restrictions and delivering exceptional service and creating a memorable experience – we've seen some great examples of this, including creative use of outdoor spaces and PPE for staff.

ADAPTING YOUR OFFER



Adjusting to people's different working patterns and challenges around consumer confidence can enable you to unlock new opportunities – examples include opening earlier in the day to compensate for lost late-night trade and creating working spaces for those wanting a change of scenery.

RANGING

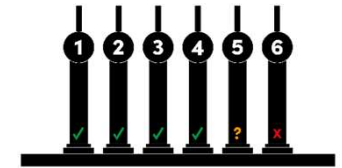


With trade levels likely to be much lower than usual due to restrictions ranges should reflect that. Ranging appropriately from the start will deliver better quality for drinkers and reduced wastage leading to better margins for you. Customers anticipate smaller ranges given the complexity surrounding re-opening

1. Match range size to available throughputs



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- Critical for quality, profit and encouraging return visits
- Minimum of 1 x keg per week for all draught keg beers & ciders,
- Maximum of 3 days for Cask Ales
 - 24+ pints per day for every firkin
- Adjust your range size according to demand
- Avoid duplication



2. Ensure you have the right balance across your range



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ENERGISE

Familiar favourites



PREMIUMISE

More Premium/ Trade up



INSPIRE

Discovery/Craft



- Choose brands from each product category and each step of the ladder....

Draught Lager Ladder

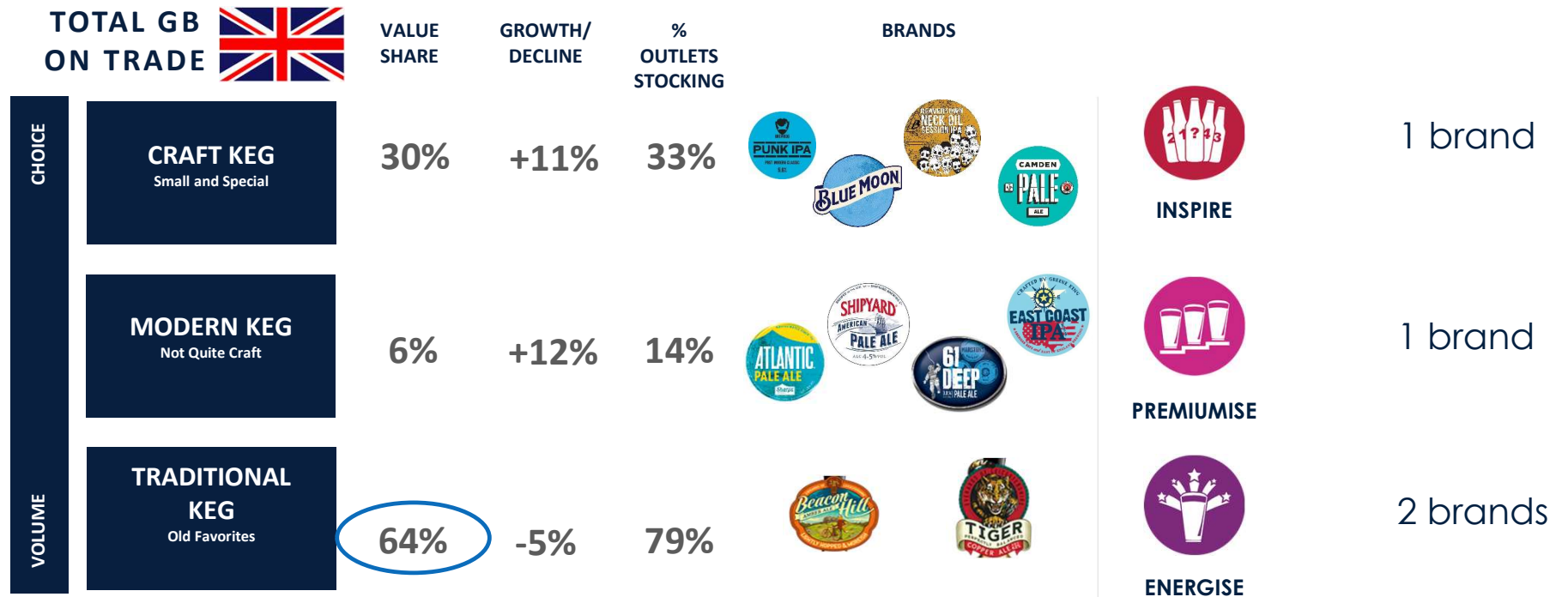
Consider throughputs at all times
 Prioritise Core Lager, Premium 4% and World Lager
 Premium 5% and Discovery/Craft can be represented by packaged

TOTAL GB
 ON TRADE 

		VALUE SHARE	GROWTH/ DECLINE	% OUTLETS STOCKING	BRANDS	TAP'S
CHOICE	DISCOVERY/CRAFT SMALL & SPECIAL	3%	-1%	19%		 1 brand
	WORLD GLOBAL EXPLORERS	24%	+10%	64%		 1-2 brands
VOLUME	PREMIUM 5% STRONG & FAMILIAR	11%	-4%	51%		 1 brand
	PREMIUM 4% NEW & INTERESTING	15%	+8%	55%		 1 brand
	CORE/CLASSIC FAMILIAR & BIG	47%	-4%	74%		 1 brand

Draught Keg Ale Ladder

Consider throughputs
 Traditional Keg Ale is the foundation of the category
 Modern Keg is an emerging part of the Keg Ale market.



Cask Ale Ladder

Build the range around the core Everard's cask brands
 Outlets that sell Cask Ale should focus on delivering quality to drinkers
 Everards Cask performance far outperforms the GB On Trade

TOTAL GB ON TRADE 		VALUE SHARE	GROWTH/DECLINE	% OUTLETS STOCKING	BRANDS	TAP'S	
CHOICE	CRAFT CASK Small & Special	14%	-16%	33%	  	 INSPIRE	1 brand
	SEASONAL CASK Guests	5%	-17%	23%	  		1 brand
VOLUME	REGIONAL CASK Local Hero's	35%	-3%	54%	  	PREMIUSE	1 brand
	NATIONAL CASK Well Loved	46%	-4%	66%	   	 ENERGISE	

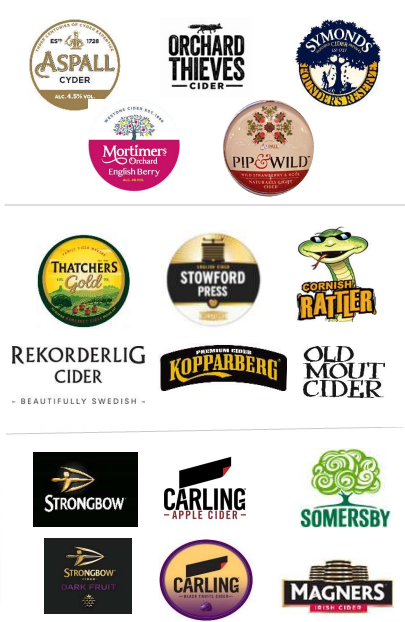
Draught Cider Ladder

Apple Cider should be the priority tap on the bar, delivering 70% of draught cider value sales overall.
 Fruit cider can be represented by packaged
 Allow for trade up if throughputs allow


TOTAL GB ON TRADE 

		VALUE SHARE	GROWTH /DECLINE
CHOICE	SUPER PREMIUM Special & Crafted	11%	+4%
		11%	+5%
		0.1%	-20%
VOLUME	PREMIUM Quality & Taste	28%	+5%
		25%	+0.1%
		3%	+59%
	STANDARD Familiar & Big	61%	-6%
		34%	-8%
		26%	-3%

BRANDS



TAP'S



INSPIRE

1 brand

PREMIUMISE

1-2 brands

ENERGISE

3. Choosing the brands that are best suited to your outlet



In order to choose the brands that are best suited we need to understand the outlet...



Example Ranging Recommendations



Range Recommendation – Community Wet Led

LAGER				CASK ALE	KEG ALE	CIDER		STOUT
CORE	PREMIUM 4%	PREMIUM	WORLD	COPPER	CORE KEG	CORE PLUS APPLE	CORE FRUIT	STOUT



LAGER RANGE

- **CARLING** is the UK's No.1 lager.
- **COORS LIGHT** is the UK's No.1 Premium 4%.
- **STELLA ARTOIS** is the No1. Premium lager.
- **MADRI** is the New World Lager from Molson Coors. It's On Trade exclusive and offers something new & exciting for customers to try.

ALE RANGE

- **TIGER** and **BEACON HILL** are good Keg Ale performers across Everards estate.
- Outlets that sell cask should build the range around **CORE EVERARD'S CASK** brands

CIDER RANGE

- **STRONGBOW** is the UK's No.1 draught apple cider
- **STRONGBOW DARK FRUITS** is the UK's No.1 draught fruit cider

Range Recommendation – Premium Food Led

LAGER				CASK	KEG ALE		CIDER	STOUT
PREMIUM 4%	WORLD	WORLD	DISCOVERY /CRAFT	COPPER	MODERN KEG	CRAFT KEG	SUPER PREMIUM APPLE	STOUT



LAGER RANGE

- **PRAVHA** is the UK's fastest growing Premium 4% Lager
- **MORETTI** is the fastest growing World Lager
- **STAROPRAMEN** is the No.1 Heritage World Lager
- **SHARP'S OFFSHORE** is the UK's No. 1 Discovery Draught Lager.

ALE RANGE

- **SHIPYARD**, No.1 Modern Keg Ale
- **BLUE MOON**, is a Top 5 Craft Ale brand and the No. 1 within the 'something different' sub-category
- Outlets that sell cask should build the range around **CORE EVERARD'S CASK** brands

CIDER RANGE

- **ASPALL** is the UK's No. 1 Super Premium apple cider.
- Draught Fruit cider represents only 20% of value in premium outlets and often delivers low throughputs. The Premium fruit cider category is dominated by packaged, concentrate on getting the packaged range right first. Only add a draught fruit cider when throughputs can be assured.

Source: CGA P03 Data to 21/03/2020, *150-200 Barrels/ Year

Summary

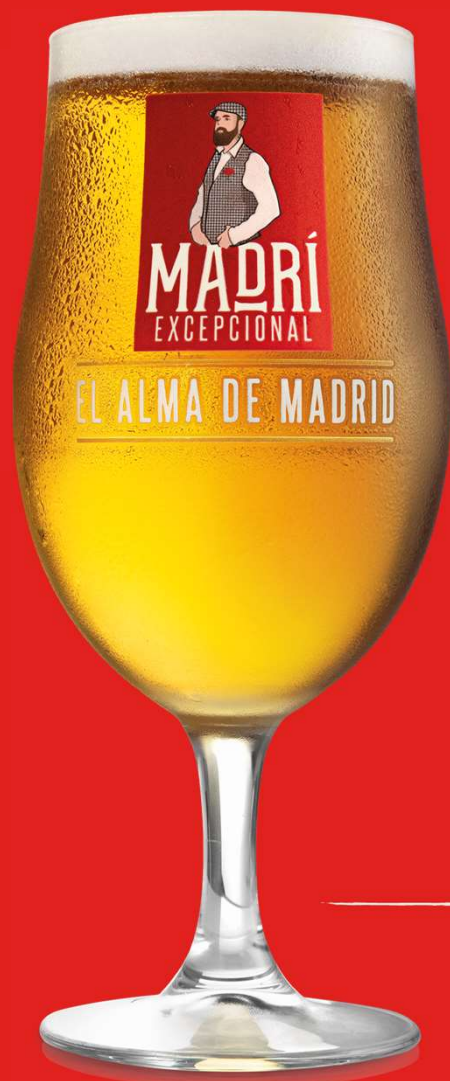


SUMMARY

-  • **FUNDAMENTALLY YOU HAVE TO FIND THE RIGHT BALANCE ACROSS A RANGE FOR IT TO BE SUCCESSFUL.**
-  • **RANGING SHOULD BE DONE IN 3 STEPS:**
 - 1. MATCH RANGE SIZE TO AVAILABLE THROUGHPUTS**
 - 2. ENSURE YOU HAVE THE RIGHT BALANCE ACROSS YOUR RANGE**
 - 3. CHOOSING THE BRANDS BEST SUITED TO THE OUTLET.**
-  • **TO ENSURE BALANCE YOU NEED TO UNDERSTAND MARKET PERFORMANCE & CATEGORY DYNAMICS**
-  • **TO CHOOSE THE BRANDS BEST SUITED YOU NEED TO UNDERSTAND YOUR OUTLET & CONSUMERS**
-  • **WORKING IN THIS WAY SHOULD DELIVER A RANGE THAT WORKS FOR YOU AND YOUR CUSTOMERS**

Questions?





MADRÍ

EXCEPCIONAL

EL ALMA DE MADRID



INTRODUCING MADRI EXCEPCIONAL

- Madrí Excepcional is a **Modern European Lager** which is the **fastest growing segment** of the World Lager Category in the On Trade.
- A **new to the U.K and exciting brand** offering something unique and interesting with a great taste profile for discerning consumers in the growing premium/world lager category.
- An exciting **collaboration** between the brewers of **La Sagra & Molson Coors** taking the very best of what both have to offer to brew a **high quality Modern European Lager**.
- Full of flavour & aroma at **4.6% ABV** with a light golden colour - has a **smooth, well-rounded taste profile** with a **short, bitter finish**.
- Comprehensive suite of **premium touchpoints** for launch.



THE MADRI OPPORTUNITY






Coming Soon.....

EL ALMA DE MADRID

Packaged Cider Ladder

TOTAL GB
ON TRADE 

	CHOICE	
SUPER PREMIUM Special & Crafted		Σ
PREMIUM Quality & Taste		Σ
STANDARD Familiar & Big		Σ

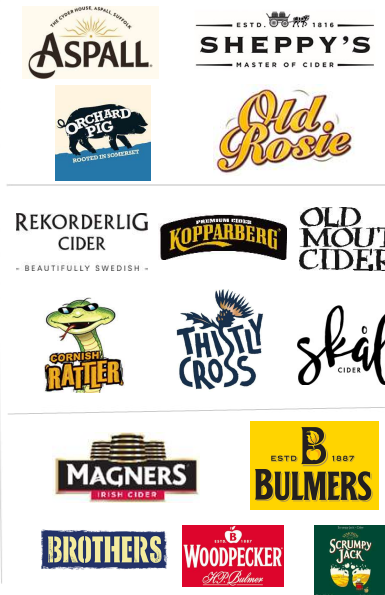
VALUE
SHARE

5%
4%
1%
71%
4%
67%
25%
17%
8%

GROWTH
/DECLINE

+22%
+18%
-43%
-4%
-15%
-3%
-14%
-10%
-21%

BRANDS



INSPIRE



PREMIUMISE



ENERGISE