The Grocer

Focus On: spirits by Natalie Brown (Natalie_brown@live.co.uk)

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The Story

- **Spirits are up in Britain: not only are they outperforming the wider alcoholic drinks market, but value growth is far outstripping volume, with Brits having splashed out an extra £49.1m on the hard stuff in the past year. Which retailers, brands and types of drinks are driving this premiumisation? How is the cheaper end of the market performing? And what does the coming year hold for the spirits market?**

Key themes:

Retailers and own label: This feature will pay close attention to how different retailers are approaching the category, in terms of their own label ranges, merchandising, price, promotions and so on. Own label is struggling at present as brands enjoy strong growth. Why is this? Is this picture consistent across the sector or are some retailers and ranges bucking the trend?

Premium spirits: Average prices are up in most of the major spirits sub sectors, despite continued use of featured space deals to drive purchase by many of the major brands. Gin has had the greatest gain in average price. And while blended whisky is struggling, pricier malt and imported whiskies are in much finer fettle. Are drinkers trading up? Which brands are benefitting and where does all this leave mid-tier and budget offerings?

Value brands: As the discounters continue to steal share of the spirits market, value brands still have a part to play in helping mainstream retailers compete. Some have even lowered abv and increased unit size to allow them to keep prices low and appeal to price conscious consumers. So which brands are performing most strongly at the value end of the market? Who's being priced out of the market?

Sub sectors: We will be analysing everything from blended whisky, vodka, gin and rum to liqueurs, pre-mixed cocktails, cognac and brandy in this feature, exploring which macro trends, brands and other factors have affected their fortunes over the past year. Gin has had the greatest gain of the past year, with blended whisky down. Why? How are players looking to sustain growth or turn things around?

Discounters: This feature will investigate how competition from the discounters is affecting the spirits aisles of the multiples. It will explore which brands available in the discounters, and at what price, as well as how these retailers are managing to capitalise on events such as Christmas by stocking super premium, but good value spirits, such as 40-year-old Scotch for £50.

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

Innovation: Key to this feature will be a discussion of the latest NPD from the category's brands and own label players, large and small. The feature will explore the market trends that have inspired these innovations and weigh up which new launches are most likely to encourage new trends in the market.

8 x innovations: We profile four new products or product ranges- that have ideally not appeared in The Grocer before, including launch date and RSP.

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?
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