BORD BIA
Republic of Ireland Beer & Cider Market
Data to w/e 8th October 2017
WHO ARE WE?
Every time Maeve brings her shopping home she scans it in for Kantar & receive points to convert to vouchers in return. She tells us;

From this we can tell you...

1. Where she shopped,
2. What she bought,
3. How much she paid

• How many shoppers are buying (% of households) – Penetration
• How often they are buying (trips) - Frequency
• How much they buy on each trip – Volume/Packs per trip
• What price they paid – Price per pack/kg
Overview of Sector, Shopper & Retailer
Beer & Cider market

Market growth of +5.8% €19m - shoppers picked up more litres per trip

Tesco outperforming & gaining share

Growth across both markets

Beer +5.8%
- Price per Lt, + Vol per trip, Trips, Shoppers

Cider +5.6%
- Price per Lt, Shoppers + Price per Pack, Vol per Trip, Spend per Trip

Shopper numbers up in Beer but not Cider

Trips numbers are relatively flat in both

Volume per trip up in both

Price per Lt, Shoppers - Price per Pack, Vol per Trip, Spend per Trip
€10.4bn
+2.5%
+€258M
The grocery market has grown primarily through greater volume per trip

- **Shopper Penetration**: 100% of ROI
- **Frequency**: 268 x year, -0.7%
- **Trip Volume**: 13 x trip, +2.3%
- **Price per Pack**: €1.72, +0.0%

52we SPEND, YOY CHANGE % & ACTUAL CHANGE
Trended over the year we can see the growth of Frequency slowing while Volume per Trip growth became more prominent.
Fresh & Chilled accounts for 48% of grocery sales, ambient is the second biggest category at 28%
Which markets are seeing biggest shifts?

- **Driving Growth**
  - Apples
  - Eggs
  - Water bottles
  - Cans of soda
  - Canned food
  - Frozen meals
  - Chocolates

- **Declining**
  - Vegetables
  - Pasta
  - Canned fish
  - Coffee
How are related categories performing?

52we

Growing

Declining
The top three multiples are neck and neck with Dunnes growing the most. Aldi and Lidl are improving on their 22% share.
In the last 12 weeks however, it is Tesco, Lidl & Aldi who are driving market growth.

12w Total Grocery – retailer value % chg YoY

- **Tesco**: Gaining share, 4.2%
- **Lidl**: Gaining share, 3%
- **Aldi**: Gaining share, 2.8%
- **Total Market**: Gaining share, 2.1%
- **Dunnes**: Losing share, 1.7%
- **SuperValu**: Losing share, 0.5%
- **Total Symbols**: Losing share, -6.3%
Tesco were the switching winners this period as they stole €5.2m from SuperValu.
Tesco and Dunnes both saw strong growth in PL & Brands. SuperValu also grew through brands, but lost PL sales.

12w Total Grocery – retailer branded vs PL value sales change YoY €000s

Growing Sales


Losing Sales

Beer
52w Beer – value sales YoY change %

€287m  +5.8%  +€15.7m
More shoppers are buying more Beer on each trip and making more trips

52w Beer

- **Shopper Penetration**: 68.7% of ROI, +1.2%
  - **€5.5m**

- **Frequency**: 22.6 x year, +1.0%
  - **€2.8m**

- **Trip Volume**: 3.8lt x trip, +4.1%
  - **€11.1m**

- **Price per Litre**: €2.82, -1.4%
  - **€3.7m**

KANTAR WORLDSPAN

© Kantar Worldpanel
Ale/Bitter is growing through all but price with Lager relying on Volume per Trip gains

52w Beer

Total Market

Stout

Ale/Bitter

Lager

€5.5m

€558k

€3.6m

€943k
Beer growth is being driven by Singles, 4-packs, 12-packs and 24-packs.

52w Beer – value share & sales YoY %

- **Singles**: +9%
- **4s**: +25%
- **6s**: +16%
- **8s**: -3%
- **12s**: +15%
- **20s**: -12%
- **24s**: +27%
- **Others**: +20%

Total: €287m
52w Beer Pack Size – value sales YoY growth

€287m  
+5.8%

+€5.2m  
+€5.6m  
+€2.3m

-€2.2m  
+€5m  
-€5.6m
Singles are winning through new shoppers paying a higher price and 4s are winning through a higher frequency and volume per trip.
Brands are almost 86% of the market and are growing sales but Private Label is driving growth.

52w Beer – value share & sales YoY %

- Branded: +4.7%
- Private Label: +13%
Aldi & Lidl are driving Private Lable sales with Tesco doing well to grow through Brands.

52w Beer – retailer Branded vs PL value sales change YoY €000s

- Growing Sales:
  - Total Market: €4,693
  - TESCO: €5,727
  - SuperValu: €1,668
  - DUNNES STORES: €848
  - Aldi: €2,171
  - Lidl: €2,817

- Losing Sales:
  - Total Market: -€598
  - TESCO: -€298
  - SuperValu: -€81
  - DUNNES STORES: -€2,332
  - Aldi: -€1,476
  - Lidl: -€1,476
Heineken has the biggest market share followed by Budweiser but Private Label & Other Brands are growing the fastest.

52w Beer – Top Brands value share & sales YoY %

- **Heineken**: 25.9%
- **Budweiser**: 14.7%
- **Coors**: 9.7%
- **Total Guinness**: 9.3%
- **Carlsberg**: 5.4%
- **Carling**: 4.6%
- **Miller**: 2.8%
- **Corona**: 2.6%
- **Molson Canadian Lager**: 3.2%
- **All Others**: 2.6%
- **Private Label**: 3.2%

[Value Share and Sales YoY diagram]
Heineken are growing behind the market while PL and Other brands lead the charge in Beer growth

52w Beer – sales YoY %

<table>
<thead>
<tr>
<th>Brand</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Others</td>
<td>17.3</td>
</tr>
<tr>
<td>Private Label</td>
<td>13</td>
</tr>
<tr>
<td>Carlsberg</td>
<td>9.5</td>
</tr>
<tr>
<td>Molson Canadian Lager</td>
<td>9</td>
</tr>
<tr>
<td>Corona</td>
<td>7.8</td>
</tr>
<tr>
<td>Total Guinness</td>
<td>6.7</td>
</tr>
<tr>
<td>Total Market</td>
<td>5.8</td>
</tr>
<tr>
<td>Heineken</td>
<td>2.1</td>
</tr>
<tr>
<td>Budweiser</td>
<td>0.1</td>
</tr>
<tr>
<td>Carling</td>
<td>-11.2</td>
</tr>
<tr>
<td>Coors</td>
<td>-15</td>
</tr>
<tr>
<td>Miller</td>
<td>-19.2</td>
</tr>
</tbody>
</table>

Gaining share

Losing share
The top performing brands are all growing through more litres bought per trip.

**Top Growth Brands**

- **Carlsberg**: €3.1m
- **Corona**: €711k
- **Molson Canadian Lager**: €1.1m
- **All Others**: €3.4m
Tesco are market leaders in Beer and they experienced the best value growth.

52w Beer – Retailer Value Share & Growth Rate

<table>
<thead>
<tr>
<th>Retailer</th>
<th>52 w/e 09 Oct 16</th>
<th>52 w/e 08 Oct 17</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tesco</td>
<td>26.8</td>
<td>27.1</td>
<td>+7.1%</td>
</tr>
<tr>
<td>SuperValu</td>
<td>22.8</td>
<td>22</td>
<td>+2.2%</td>
</tr>
<tr>
<td>Dunnes Stores</td>
<td>18.2</td>
<td>17.5</td>
<td>+1.6%</td>
</tr>
<tr>
<td>Aldi</td>
<td>11.1</td>
<td>10.4</td>
<td>-0.5%</td>
</tr>
<tr>
<td>Lidl</td>
<td>12.3</td>
<td>12.1</td>
<td>+4.0%</td>
</tr>
</tbody>
</table>
All retailers suffered from Beer deflation but all but Aldi grew through new shoppers and increased litre purchasing per trip

### 52w Beer

<table>
<thead>
<tr>
<th>Retailer</th>
<th>Shopper Penetration</th>
<th>Litres per Trip</th>
<th>Average Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>TESCO</td>
<td>+1.5ppt</td>
<td>+5.4%</td>
<td>-2.6%</td>
</tr>
<tr>
<td>SuperValu</td>
<td>+0.4ppt</td>
<td>+5.3%</td>
<td>-0.7%</td>
</tr>
<tr>
<td>DUNNES STORES</td>
<td>+0.9ppt</td>
<td>+4.2%</td>
<td>-0.5%</td>
</tr>
<tr>
<td>ALDI</td>
<td>-1.5%</td>
<td>-0.3%</td>
<td>-0.8%</td>
</tr>
<tr>
<td>LIDL</td>
<td>+1.0ppt</td>
<td>+1.1%</td>
<td>-1.0%</td>
</tr>
</tbody>
</table>
WHAT DO I NEED TO KNOW BEFORE I TALK TO A RETAILER?
How are they doing in Beer?

+€5.1m

How can you help?

Older Dependents  45+ Family  Empty Nesters

Tesco under-trades
Stout = €1.2m
Ale/Bitter = €3.1m
How are they doing in Beer?

+€1.4m

How can you help?

SuperValu under-trades
Lager = €1.6m
DUNNES STORES

How are they doing in Beer?

+€766k

How can you help?

Pre-Family  Retired

Dunnes under-trades Lager = €2.9m
How are they doing in Beer?

€162k

How can you help?

Aldi under-trades
Stout = €1.8m
How are they doing in Beer?

+€1.3m

How can you help?

45+ Family  Older Dependents

Lidl under-trades
Stout = €789k
Lager = €1.4m
Cider
52w Cider – value sales YoY change %

€57m
+5.6%
+€3m
Fewer shopping are buying Cider but those that are, are buying a lot more per trip.

**52w Cider**

- **Shopper Penetration**: 39% of ROI, -5.5%
  - €2.6m
- **Frequency**: 9.1 x year, +0.1%
  - €31k
- **Trip Volume**: 3.2lt x trip, +12.2%
  - €6.3m
- **Price per Litre**: €3.10, -1.3%
  - €747k
Each multiple retailer is driving Cider growth through big volume per trip gains

52w Cider

Total Market

Tesco

SuperValu

Dunnes

Total Market

Tesco

SuperValu

Dunnes

€2.6m

€2.5m

€2.5m

€2m
Aldi’s losses are coming mainly through frequency declines while Lidl are gaining through frequency and volume per trip.

52w Cider

Aldi

€158k

Lidl

€561k
Cider growth is being driven by strong performance of 12 packs which now makes up 9.4% share of Cider

52w Cider – value share & sales YoY %

- Singles: 8% (-6%)
- 4s: 4.6% (+2.4%)
- 8s: 9.4% (+4.6%)
- 12s: +++%
- 20s: 33.6% (-1.0%)
- Others: 4.9% (+34%)

€57m
52w Cider Pack Size – value sales YoY growth

€57m
+5.6%
+€3m

-€1.3m
+€65k
+€835k

+€1.3m
€41k
+€2.1m
Singles are in decline through lost shoppers while 12 packs are growing well through new shoppers and 8 packs are up with higher frequency and price.

### Growth sizes

- **4s**
- **8s**
- **12s**
- **Others**

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**52w Cider**

**Decline sizes**

- **Penetration %**
- **Purchase Frequency**
- **Trip Packs**
- **Price per Litre**

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**Others**

- **Penetration %**
- **Purchase Frequency**
- **Trip Packs**
- **Price per Litre**
Brands make up almost 88% of the market and are growing sales and share while Private Label is flat YoY.

52w Cider – value share & sales YoY %:

- Branded: +6.4%
- Private Label: +0%
Dunnes & SuperValu drove branded cider sales in the last year

52w Cider – retailer Branded vs PL value sales change YoY €000s

-€2,992

€995

€1,075

€323

Tesco

SuperValu

Dunnes Stores

Aldi

Lidl

Growing Sales

Losing Sales

Total Market

KANTAR WORLDPANEL
Bulmers is the biggest Cider brand with 52% share followed by Orchard Thieves and Kopparberg.
Bulmers are growing behind the market while Orchard Thieves and Other brands lead the charge in Cider growth

### 52w Cider – sales YoY %

<table>
<thead>
<tr>
<th>Category</th>
<th>Value Growth %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orchard Thieves</td>
<td>20.3</td>
</tr>
<tr>
<td>All Others</td>
<td>15.9</td>
</tr>
<tr>
<td>Kopparberg</td>
<td>11</td>
</tr>
<tr>
<td>Total Cider</td>
<td>5.6</td>
</tr>
<tr>
<td>Bulmers/Magners</td>
<td>1.4</td>
</tr>
<tr>
<td>PL Cider</td>
<td>0.1</td>
</tr>
<tr>
<td>Stella Artois</td>
<td>-3.2</td>
</tr>
</tbody>
</table>
The top performing brands are all growing through more litres bought per trip

Top Brands

- Bulmers/Magners
  - €1.8m

- Orchard Thieves
  - €480k

- Kopparberg
  - €325k

- All Others
  - €431k
Dunnes were the Cider growth winners while Tesco and Aldi lost out.

52w Cider – Retailer Value Share & Growth Rate

-4.1%  +8.0%  +8.9%  -6.7%  +7.5%

29.2  26.6
23  23.5
22.6  23.2
8.4  7.4
8.6  8.7

TESCO  SuperValu  DUNNES STORES  ALDI  Lidl

52 w/e 09 Oct 16  52 w/e 08 Oct 17
All retailers but Dunnes are losing Cider shoppers but shoppers are buying more per trip in all except Aldi.

### 52w Cider

<table>
<thead>
<tr>
<th>Retailer</th>
<th>Shopper Penetration (Actual change in shopper penetration)</th>
<th>Litres per Trip (% change vs last year)</th>
<th>Average Price (% change in € per ltr)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TESCO</td>
<td>-2.8ppt</td>
<td>+10.6%</td>
<td>-1.2%</td>
</tr>
<tr>
<td>SuperValu</td>
<td>-2.6ppt</td>
<td>+11.4%</td>
<td>+0.6%</td>
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<td>DUNNES STORES</td>
<td>+1.6ppt</td>
<td>+17.2%</td>
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<td>LIDL</td>
<td>-1.3ppt</td>
<td>+13.8%</td>
<td>-2.2%</td>
</tr>
</tbody>
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WHAT DO I NEED TO KNOW BEFORE I TALK TO A RETAILER?
How are they doing in Cider?

Tesco under-trades
- Dublin = €151k
- Connacht & Ulster = €363k
- Munster = €302k

ABC1

Aged >45
With Children
How are they doing in Cider?

+€995k

How can you help?

C2DE

Aged >45

With Children

SuperValu under-trades
Dublin = €749k
How are they doing in Cider?

+€1.1m

- 

How can you help?

C2DE

Aged <45

Without Children

**Dunnes under-trades**

Rest of Leinster = €886k
How are they doing in Cider?

-€302k

How can you help?

ABC1

Aged <45

With Children

Aldi under-trades
Rest of Leinster = €76k
How are they doing in Cider?

+€345k

- €345k

How can you help?

C2DE

Aged <45

With Children

Lidl under-trades

With Children = €84k
Questions?

<table>
<thead>
<tr>
<th>Kantar Contact:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eoghan Fox/ Seoin Talbot</td>
</tr>
<tr>
<td>Telephone: 01 480 89 91 /41</td>
</tr>
<tr>
<td><a href="mailto:Eoghan.Fox@KantarWorldpanel.com">Eoghan.Fox@KantarWorldpanel.com</a></td>
</tr>
<tr>
<td><a href="mailto:Seoin.Talbot@KantarWorldpanel.com">Seoin.Talbot@KantarWorldpanel.com</a></td>
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Overview of Sector, Shopper & Retailer
Beer & Cider market

Market growth of +5.8%
€19m - shoppers picked up more litres per trip

Growth across both markets

Beer +5.8%
- Price
  + Vol per trip, Trips, Shoppers

Cider +5.6%
- Price per Lt, Shoppers
  + Price per Pack, Vol per Trip
  + Price per Pack, Vol per Trip

Shopper numbers up in Beer but not Cider

Trips numbers are relatively flat in both

Volume per trip up in both

Tesco outperforming & gaining share

+16%