



## BRAND STORY

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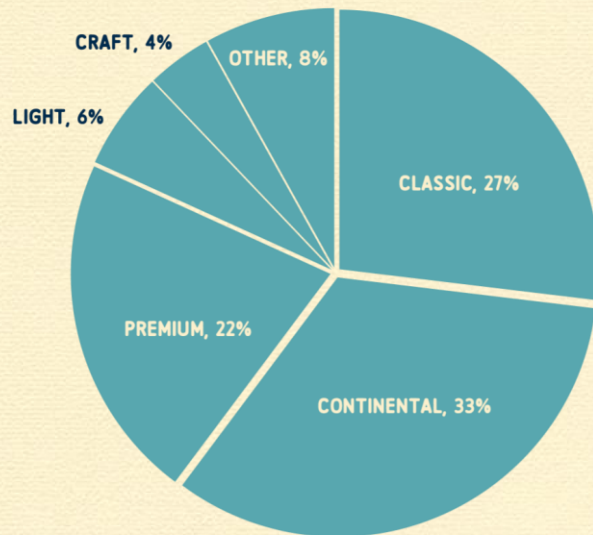
2024

# CONTINENTAL LAGER IS WINNING IN THE MARKETPLACE AND SHOULD FORM PART OF A SUCCESSFUL BEER RANGE

DELIVERS SIGNIFICANT VALUE TO AN OUTLET, WHILE PROVIDING CONSUMERS WITH  
THE OPPORTUNITY TO DISCOVER NEW TASTES AND FLAVOURS AT A HIGHER PRICE POINT

## BIGGEST

Highest share of sales value



## FASTEST GROWTH

High Consumer Demand

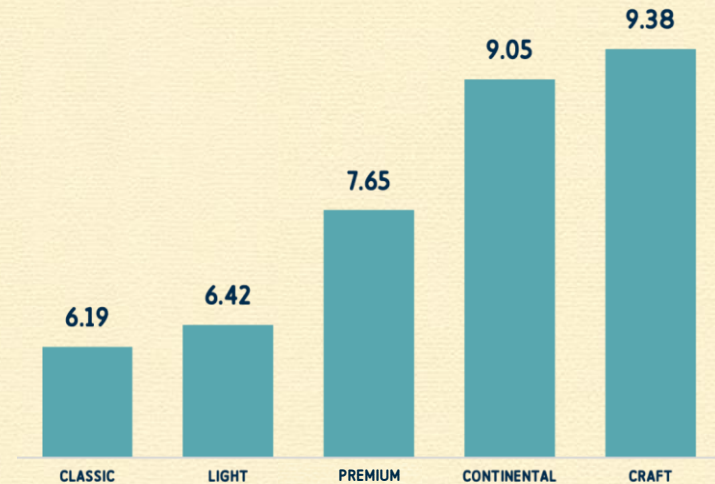
**+22%**

Value YOY

Classic	-6.4%
Premium	-6.4%
Light	0.9%
Craft	0.3%
Other	9.3%

## HIGH PRICE

Worth Paying More For  
Price/Litre (£)





# CONSUMERS CONTINUE TO LOOK FOR NEW AND INTERESTING BRANDS AND PREMIUMISE THEIR CHOICES, PROVIDING OPPORTUNITY TO DRIVE EVEN MORE VALUE

## PREMIUMISATION

Lager is the

2ND

MOST TRADED UP category

with...

1/5

consumers likely to trade up in lager

OVER HALF

Of consumers are likely to pay more for better quality

## QUALITY AND CHOICE

37% consumers like trying new drinks brands



OVER 1/3

making higher quality drinks choices than a year ago

## OPPORTUNITY

Continental Lager is premiumising slower than lager and slower than other more premium options

### PRICE/ PINT CHANGE VS 4YA

Draught Lager	£0.54
Discovery Lager	£0.83
Sunshine Lager	£0.65
Low/ No Lager	£0.59
Craft Lager	£0.49
Continental Lager	£0.45





## ITALIAN LAGERS MAKE UP ALMOST 2/3 OF CATEGORY SALES WITH BIRRA MORETTI THE BIGGEST BRAND



£2 BILLION



£900 MILLION



£145 MILLION

OTHER

£79 MILLION



1 IN EVERY 3 LITRES SOLD  
of continental lager



25% OF ALL CONTINENTAL  
LAGER GROWTH



+144M (+15.7%)



# BIRRA MORETTI

## SALE DI MARE

### WHAT IS IT?

Medium bodied  
premium lager, 4.8%

Unfiltered with a  
slight natural haze

Enriched with a hint  
of Italian sea salt



FOR FULL FLAVOURED  
REFRESHMENT



### DRIVING DIFFERENTIATION WITH A TOP SCORING PRODUCT

Unfiltered lager has  
high awareness & likeability

Sea salt is commonly used  
in food to enrich flavours

Top research scores:

- ✓ Quality
- ✓ Refreshment
- ✓ Brand fit



# APPEALING TO MORE AFFLUENT CONSUMERS, WITH HIGHER DISPOSABLE INCOMES, ON PREMIUM FOOD AND WET-LED OCCASIONS



Willing to spend more on high quality lager



Looking to discover new brands/tastes



Opportunity to put more ££ in the till

STRETCHING THE LAGER PRICING LADDER, BUT STILL BELOW CRAFT

Recommended 11% price premium to BIRRA MORETTI L'Autentica





# WHERE SHOULD SALE DI MARE BE STOCKED?

IN MORE PREMIUM OUTLETS, OR ITALIAN RESTAURANTS WHERE IT CAN MAINTAIN A HIGH PRICE POINT

BIRRA MORETTI **SALE DI MARE** CAN...

- ✓ ...Be incremental to a range, or it can replace premium options where there is duplication or brands with a lower ROS.
- ✓ ...Add variety to the lager range and stretch the lager pricing ladder, driving more cash in through the till.
- ✓ ...Sit alongside BIRRA MORETTI L'Autentica, increasing overall volume, as cannibalisation rates will be low.
- ✓ ...Drive category value by trading up mainstream consumers



Selling prices are at the sole discretion of the retailer

Source – CGA MAT P9 Average Price; 30L of removed beer sold at RRSP of SDM





## PACKAGED BIRRA MORETTI SALE DI MARE OFFERS A CHOICE FOR CONSUMERS WHO PREFER BOTTLES

27% OF LAGER CONSUMERS ONLY DRINK PACKAGED

### PACKAGED CONTINENTAL LAGER

Stocked in over 70%  
of all On Trade outlets

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Worth over £330M

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Largest sub-category  
in packaged lager

### BIRRA MORETTI SALE DI MARE PACKAGED

Can sit alongside draught  
BIRRA MORETTI Sale di Mare  
as appeals to a different  
consumer/occasion

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Price premium to  
BIRRA MORETTI L'Autentica  
and other continental packaged  
lagers, putting more cash in the  
till



# SIGNIFICANT INVESTMENT TO DRIVE AWARENESS AND TRIAL

## HUGE MEDIA AND SAMPLING INVESTMENT

High reaching channels including TV, digital, social & OOH to drive awareness including bespoke in outlet bar call assets!



Premium sampling to drive trial

590K+ SAMPLES

PR & influencer partnerships to drive relevance with target audience



## DRIVING VISIBILITY AND CONSIDERATION IN OUTLETS





# A SUPPORT PLAN DESIGNED TO DRIVE AWARENESS AND TRIAL IN OUTLETS

New installs will be supported with point of sale and a trial driving digital activation



Includes: glassware,  
bar runners, fount hanger,  
digital assets

Install Kits: Available from February



Consumer directed via targeted Social  
Media campaign

Free Pint Mechanic: Live May

Sign ups will be capped

Flagship Gardens & Sampling



Available from April



# BIRRA MORETTI

L'AUTENTICA

— DAL 1859 —

## TASTING NOTES

A well-balanced lager with some hoppy and fruity notes, finished with moderate bitterness and a clean after taste

ABV: 4.6% IBU: 20

## TARGET CONSUMER

**Gen Y (30-45 YO)** male consumers who are willing to pay a price premium for a quality lager

## OCCASIONS

Mid-tempo occasions with family and friends. Also perfectly paired with food including pasta

ROOTED IN THE  
TUSCAN COUNTRYSIDE



# BIRRA MORETTI

## SALE DI MARE

## TASTING NOTES

A medium bodied unfiltered lager with a hoppier taste profile than L'Autentica, delivering citrus and pine aromas with a smooth and rounded finish. Sale Di Mare contains extra hop aromas (Cascade and Mount Hood) giving it a slightly fuller taste portfolio than L'Autentica and a hazy golden colour

ABV: 4.8% IBU: 21

## TARGET CONSUMER

**Gen Y (30-45 YO)** affluent male consumers who want to discover new, interesting flavours and are willing to pay a price premium

## OCCASIONS

Slightly higher tempo occasions but also perfect with food including fish

BORN FROM THE  
ITALIAN COAST



SALUTE