

Beer - UK - December 2011

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“Lager can undoubtedly innovate its way out of its current slump. If ever there was doubt about the importance of innovation in driving sales this can be dispelled by the value which flavoured vodkas plus pear and other fruit-flavoured ciders have added to their respective youth-orientated categories.”

– Jonny Forsyth, Senior Drinks Analyst

In this report we answer the key questions:

- How can beer unlock the potential of off-trade sales?
- Are UK lager sales in permanent free-fall or will they recover?
- Can lager innovate its way out of its current slump?
- Can lager realistically attract UK women in sufficient numbers to stabilise overall sales?

Definition

This report looks at the UK market for beer sold in both the on-trade, ie out-of-home outlets such as pubs, restaurants and clubs where the drink is consumed on the premises, and the off-trade (or take-home) market, eg supermarkets, off-licences and convenience stores.

The beer market is divided into three main segments:

- Lager can broadly be described as a light/amber, clear, carbonated beer brewed with pale-kilned malts which, after fermentation, is filtered, pasteurised and conditioned before being packaged in cans, bottles or kegs for sale. This is, however, a very broad definition, and as consumers’ tastes become more sophisticated, there is a growing interest in darker lagers using different malts, sometimes referred to as red and black lagers, organic beers and even fruit-flavoured beers.
- Ale. Mintel uses the term ‘ale’ throughout the report. This is also sometimes referred to by consumers as mild or bitter. The report covers top-fermented beers that are traditionally described as British or Irish, ie bitter and mild, packaged light, pale, export and brown ales, stout, porter, barley wine and strong ales. These beers are so called because the yeast floats to the surface during fermentation, as opposed to lagers, which are bottom-fermented. Barley wine is simply a beer that is very strong in alcohol.
- Stout is a derivative of porter, originally an 18th century brown mild ale. Stout is a black, dense beer, which is usually top-fermented, and made with dark roasted barley and an abundance of hops, which provide the characteristic flavour.

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EMEA: +44 (0)20 7778 7151
Americas: +1 (312) 932 0600
APAC: +61 (0)2 8284 8100