

# Beer in 2020: The contemporary view and what's on the horizon

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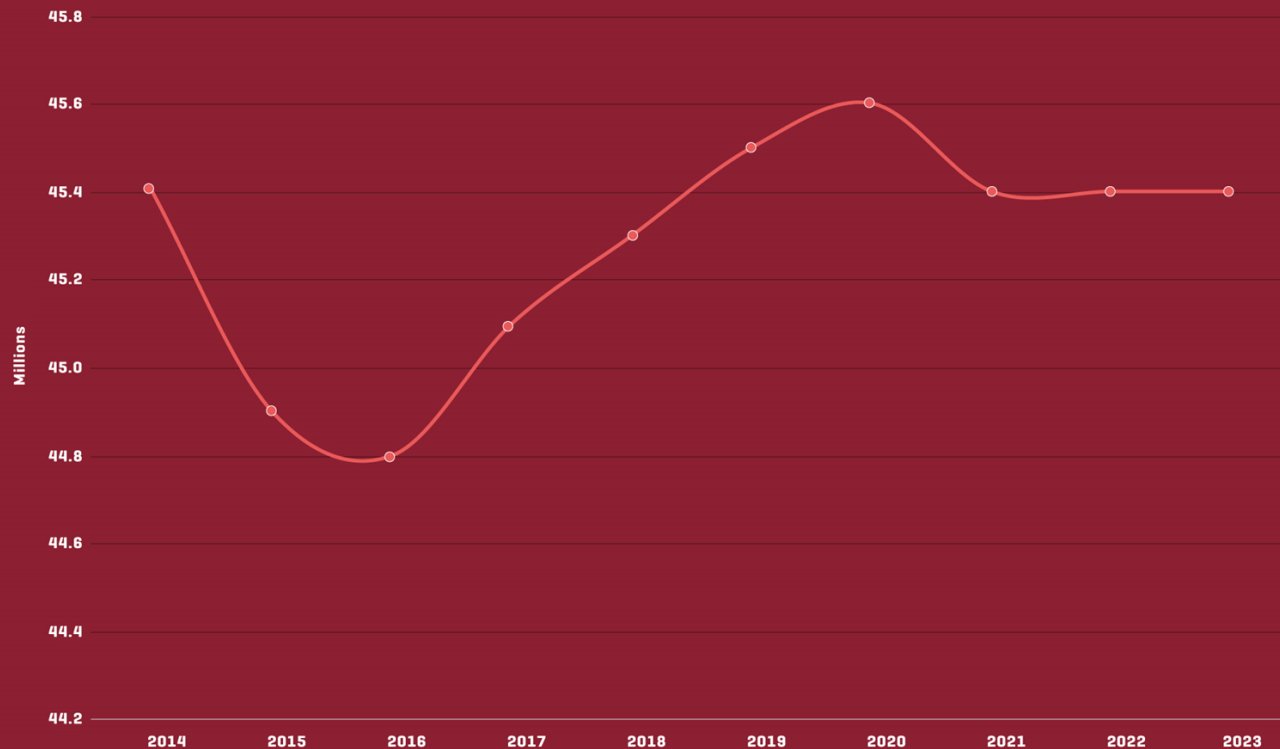
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# The challenges

## Slow Volumes Growth

### UK beer volumes, 2014-2023



2000 - 58.8m hectolitres

Source: Global Data

The challenges

# Generation Z

- Born in 2001
- Digital native
- The 'anti-Millennial'
- Buys with conscience
- The Dry Generation?

# Diversification?

Smirnoff Cider?

Echo Falls Vodka?



# Diversification?

Target other drinking occasions

Staying healthy

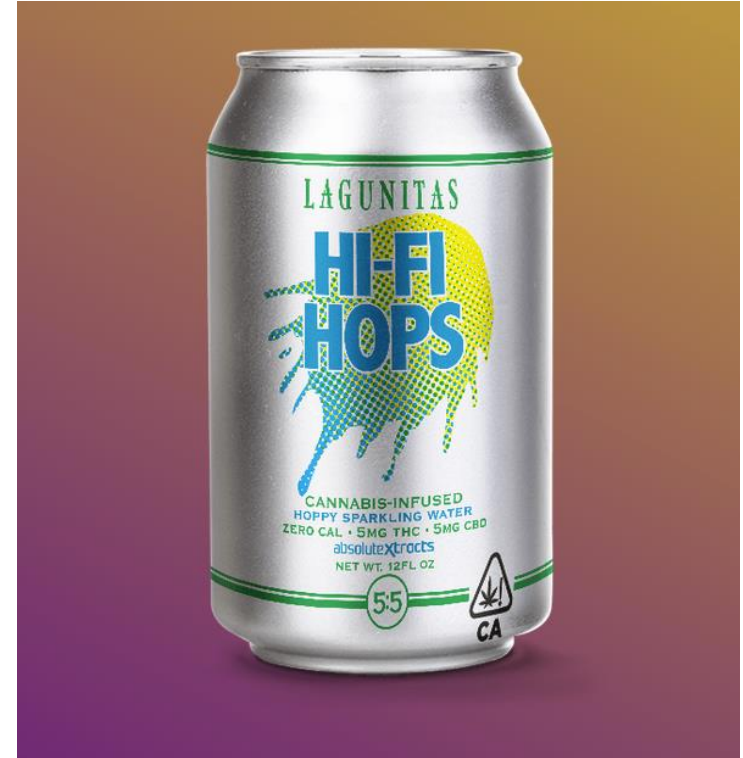


# Innovation?

Why should hops be limited to beer?

Lagunitas Hop - sparkling water, zero alcohol, carbohydrates and calories

Hi-Fi Hops - contains up to 10mg of THC, the psychoactive ingredient in cannabis



# Premiumisation?

Carlsberg - Probably **NOT** the best beer in the world!

Quantity not quality

Introducing Carlsberg Danish Pilsner





# Consolidation?

Boston Beer Co & Dogfish Head Craft Brewery

Merger will better position against "global beer conglomerates" in the craft category

"This is a formidable combination of brands, incredible brewing talent, and leaders who remain 100% focused and committed to the long-term health of our breweries and growing the beer industry"

- Boston CEO Dave Burwick

Comment

## Boston Beer, Dogfish Head merger - Squeezed middle seek safety amongst themselves - Comment

Andy Morton | 10 May 2019

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They are beer's squeezed middle. Far smaller than the international brewers, such as **Anheuser-Busch InBev** and **Molson Coors**, that dominate the US beer industry with their mass volumes and distribution leverage, yet much larger - and unwieldy - than the new generation of nimble craft brewers blazing a trail, and finding growth, with Millennial consumers.



*Boston Beer has found it impossible to turn around Samuel Adams volumes*

Chief among them is Boston Beer Co, which this week sought to kickstart its way out of a long-term beer volumes decline by **swallowing up the smaller, yet still substantial, Dogfish Head Brewery**. Heaven knows Boston had tried everything else - from going big on hard cider with the Angry Orchard brand, then sidestepping into hard seltzers when the company took to the sweeter side of the LAD (long alcoholic drinks) paradigm.

All of this seems to have worked - **ciders and seltzers currently prop up growth for the company**. But, cider lost ground to seltzers and now Boston's alcoholic sparkling water brand, Truly, is, in turn, losing out to newer, fresher rivals. On the investor front, analysts fear for Boston's future.

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# Thankyou



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