

DBA DESIGN EFFECTIVENESS AWARDS 2020

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JUBEL

**CREATING CUT THROUGH IN THE
CRAFT BEER CATEGORY**

CLIENT NAME

JUBEL

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EXECUTIVE SUMMARY

The founders of Jubel discovered peach lager while on holiday in the Alps and instantly recognised a gap for the drink in the UK market. It had the refreshment qualities of a cider with the 'sessionability' of a lager, and was perfect to bridge the gap between the two.

Jubel was born and quickly gained a following in pubs and bars in the South West of England, but more in the mainstream lager category rather than craft beer, where the duo felt it belonged. They realised that the brand's identity didn't match its core ambition or tell consumers a compelling story, and so they came to us to help them compete, and to put them on the right track to fulfilling their ambition of cutting through the beer and cider categories to pioneer a new style of beer.

As a result of Jubel's new brand strategy, identity and packaging Jubel is now ahead of schedule and has established a strong foothold in the craft beer market. Specifically,

IN THE ON-TRADE, JUBEL HAS EXCEEDED ITS TARGETS:

DISTRIBUTION
POINTS



OF YEAR 1 TARGET

INVOICED
SALES VALUE



IN THE OFF-TRADE, JUBEL HAS TOTALLY SMASHED ITS TARGETS:

DISTRIBUTION
POINTS



OF YEAR 1 TARGET

VOLUME



INVOICED
SALES VALUE



The redesign allowed Jubel to deepen its distribution through existing wholesalers, as well as widen distribution by winning several new key accounts.

The strength of the brand proposition and design attracted interest from Sainsbury's, securing distribution in the off-trade one year ahead of schedule, as well as a minority stake investment from C&C, securing distribution through wholesalers such as Matthew Clark and Bibendum.

And finally, its YOY value growth of 184.5% post redesign vastly outstrips the leading brands. It is attracting a different type of consumer to the category, delivering incremental value sales of 62% to Sainsbury's, and more importantly, helping to pioneer a new style of beer.



CONTEXT & OVERVIEW

BACKGROUND, BRIEF AND THE MARKET

BACKGROUND

During a university ski trip to the Alps, Founders of Jubel discovered 'demi peche', a peach lager that was the drink of choice for everyone from young 20-somethings to people their parents' age. They loved it because it was more interesting and easy-to-drink than beer and it wasn't as sweet as a fruit cider.

Back at home they couldn't find anything like it, so toyed with the idea of creating it themselves. It had such broad appeal, and they felt that its refreshment qualities of a cider and 'sessionability' virtues of a lager made it the perfect product to bridge the gap between cider and beer.

MARKET CONTEXT

IN 2016 THE TOTAL BEER MARKET WAS LOSING VOLUME DUE TO 32% OF BRITS ACTIVELY REDUCING THEIR ALCOHOL INTAKE, YET VALUE WAS IN GROWTH DUE TO THE RISE OF CRAFT BEER¹

and consumers switching from standard lager to more premium brands².

However, with craft still only representing 6.5% of the market³, there was the opportunity to drive further growth but, the challenge for craft brands was to broaden their appeal to become more accessible to the mass market.

At the same time, the fruit revolution had transformed the cider and gin categories. In 2017, fruit cider saw double digit value and volume growth⁴, and with over 1.2m more people drinking fruit ciders than apple ciders², there was clearly a trend in consumers looking to experiment with flavours.

And as part of wanting to live a healthier lifestyle and care for the planet, consumers were moving to vegan diets, with veganism becoming the fastest growing social movement in the UK⁵.

With all that at play, it was clear that there was a viable gap in the market, so Jubel Founders learnt how to brew beer while doing their day jobs, and after spending two years refining the product Jubel launched commercially in May 2017.

THE CHALLENGE

Having spent time on getting the product right - which happened to be vegan friendly and gluten free - nine months after launching, they realised the branding hadn't quite hit the spot. Their brand ambition to cut through the beer and cider categories and to pioneer a new style of beer wasn't being communicated on pack. And this had led to Jubel being placed in the wrong category by the on-trade - i.e. against Corona and Sol, which wasn't surprising as it took its design cues from this segment. Jubel looked like it was in standard lager, multipack territory, and not the premium and craft beer territory where it needed to be.



CONTEXT & OVERVIEW

BACKGROUND, BRIEF AND THE MARKET

THE BRIEF

Jubel wanted to open up the market by pioneering a new style of beer, which cut through the beer and cider categories, to ultimately get a beer in every drinker's hand. So, they came to us to help Jubel live this ambition through its identity, how it should be translated on pack and, more importantly, how to do it in a way that's authentic to what Jubel is, but also that appeals to the mass market.

As Jubel was only sold in the on-trade through St Austell Brewery, the largest wholesale distributor of alcoholic drinks in South West England, the primary goal for year one was to increase distribution from 40 distribution points to 110. Off trade would become more of a focus in year two, so targets for year one were conservative.

OUR KEY MEASURES OF SUCCESS WERE BASED ON PUTTING JUBEL ON THE RIGHT TRACK TO FULFILLING ITS 5YR PLAN:

- ① **ON TRADE – 110 DISTRIBUTION POINTS, 370HL VOLUME, & AN INVOICED SALES VALUE OF £91K IN YEAR 1**
- ② **OFF TRADE – 5 DISTRIBUTION POINTS, 40HL VOLUME, AND AN INVOICED SALES VALUE OF £9K IN YEAR 1**
- ③ **COMPETING IN THE CRAFT BEER SEGMENT, RATHER THAN MAINSTREAM LAGER**

SOLUTION

This project was very much a collaboration every step of the way. Our challenge was to find a way to expand the brand, and broaden its relevance and appeal, from a niche following to a more universal and iconic proposition. Not an easy task as our research showed that, despite craving new experiences, consumers can often be risk averse when it comes to trying new products. Ultimately, they crave something different, yet often want familiarity and reassurance about the taste or enjoyment they will gain.

For brands, this means balancing excitement with accessibility. And for us, it was important to offer a more emotive brand experience that taps into the lifestyle and behaviour of this kind of contemporary consumer thinking. Our focus was on creating one big, bold idea to inform the brand positioning, strategy, tone of voice and design.

FROM 'APRÈS SKI' TO OFF PISTE

Jubel was very much based on the notion of après ski – where the Jubel Founders had fallen in love with the product. But its adventurous, vibrant and light-hearted personality wasn't coming through on pack. We also felt that après ski could be holding them back – taken literally, the idea could be polarising, making it seem inaccessible and confusing, but more importantly, tied to an actual place rather than a broader mindset or feeling.

We challenged them to find the bigger idea embodied in their story and the mindset that sits above all of this – the one thing that speaks to their idea to challenge convention.

'Off Piste' captures both the personal ethos of Jubel and is symbolic of the core of the brand without being clichéd. It speaks to the exhilaration of space and the outdoors, full of true elation and joy, and also having the balls to go off the beaten track with the confidence to know that the reward will be all the more sweet when you do. It puts consumers' fears of being different at the heart of the brand but provides that reassurance and rallying cry to drink differently, and to deviate from the norm.

CUT THROUGH & STAND OUT

There were two specific aims with our design thinking and approach. We needed to convey the idea of living off piste but also simply and effectively communicate the core message and product offer of 'beer done differently'.

We also needed to understand the category cues in order to know what to leverage and where we could stand out – a switch to brown bottles, for example, instantly placed Jubel into premium/craft territory instead of standard lager and provided the familiarity that consumers needed. Bold typography also played a part here, as well as being a nod to the ballsy, no nonsense approach to brewing.

Our central design idea for the packaging is about breaking through the mundane. The bold cut through the design nods to the fact that it's cutting through the beer and cider categories, and it also symbolises the flavour cutting through the beer, highlighting the product's point of difference in an accessible way rather than being confusing or sickly sweet.

The 'cut' device also slices through the J of the logo mark to signify the dual aspect of the brand; with two founders, the joining of beer and flavour and two sides that are at once both refreshing and fun. Visually it also reinforces the off piste idea as it's like a ski slope.

“WHY BE BORING WHEN YOU COULD BE POURING...”

GRABBING LIFE BY THE JUBELS

We also gave Jubel an upbeat and unexpected tone of voice that manifests not just on pack, but through all communications from website to posters to social media. For example, “why be boring when you could be pouring...” taps into a mindset that appeals to its consumers.

On pack, we describe the beer as 'beer cut with peach' to further reinforce the brand's mission, and variants are named in a way to appeal to adventurous types and to reflect the origin of the flavours. They also have their own back story:



Peach, after demi peche in the Alps



Elderflower, as it's a big flavour in London



Grapefruit, inspired by Croatian life where they add grapefruit to lager

RESULTS OVERVIEW

RESULTS VS. OBJECTIVES

KEY FACTS

LAUNCH DATE: APRIL 2018

FEES: REDACTED CONFIDENTIAL DATA



1. ON - TRADE

Jubel's on-trade targets were REDACTED CONFIDENTIAL DATA in year 1.

**DISTRIBUTION POINTS
ACHIEVED IN YEAR 1**

272%

REDACTED CONFIDENTIAL DATA
which is 272% of target

**VOLUME
ACHIEVED IN YEAR 1**

92%

REDACTED CONFIDENTIAL DATA
which is 92% of target

**INVOICED SALES VALUE
ACHIEVED IN YEAR 1**

110%

REDACTED CONFIDENTIAL DATA
which is 110% of target

The redesign has enabled Jubel to deepen its distribution through existing wholesalers, as well as widen distribution by winning several new key accounts.

In April 2018, the redesigned Jubel was launched exclusively in the on-trade with St Austell Brewery, Nectar Imports and LWC. As a result of the redesign, Jubel has won 400+ new distribution points through its existing accounts as well as new wholesalers such as Matthew Clark, Bibendum, Venus Drinks, Diverse Fine Foods, AF Blakemore and HB Clark. This has opened up the potential for supplying more than 25% of the on-trade in England through these routes to market.

Listings with new customers such as Fullers Pub Estate, St Austell Pub Estate, Mosaic Bars & Pubs, Brunning & Price, Coaching Inn Group, The Milestone Group, Fletchergate Industries, Stable Pizza, Pergola London and more than 300 independent free trade outlets, has led to the on-trade generating (REDACTED CONFIDENTIAL DATA) in invoiced sales in the 18 months following the launch of the rebrand.

Although Jubel didn't quite reach the desired (REDACTED CONFIDENTIAL DATA) volume target, it was able to charge a more premium price per HL for the beer than initially forecasted, allowing it to over-achieve on its value target. This was due to the redesign positioning it away from standard beers (e.g. Corona) and towards the craft beer segment.

2. OFF - TRADE

Jubel's off-trade targets were (REDACTED CONFIDENTIAL DATA). And it has totally smashed them:

**DISTRIBUTION POINTS
ACHIEVED IN YEAR 1**

20,000%

REDACTED CONFIDENTIAL DATA
which is 272% of target

**VOLUME
ACHIEVED IN YEAR 1**

647.5%

REDACTED CONFIDENTIAL DATA
which is 92% of target

**INVOICED SALES VALUE
ACHIEVED IN YEAR 1**

922%

REDACTED CONFIDENTIAL DATA
which is 110% of target

Achieved Y2 target of distribution in major multiple one year early

RESULTS OVERVIEW



RESULTS VS. OBJECTIVES

SAINSBURY'S

Sainsbury's approached Jubel based on the strength of its proposition and quickly became Jubel's biggest off-trade listing in November 2018. Due to its success, the retailer doubled distribution in April 2019 (REDACTED CONFIDENTIAL DATA).

Sainsbury's listed Jubel in the craft beer category due to the redesign. Their buyer said, "I wouldn't have listed that in craft before the rebrand because it didn't look like it belonged there."

And it is paying off for both parties. At the IGD conference Sainsbury's Food Commercial Director, shared that Jubel is driving category growth in Sainsbury's, with 62% incremental sales to its BWS category and a 35% repeat purchase rate. The brand is performing in the top half of the craft beer category which is an incredible feat in such a competitive category within the first year of launch.

SELFRIDGES

Jubel was listed in Selfridges in London, Birmingham and Manchester, and was the best-selling beer in Selfridges during its launch month in August 2018.

The retailer was also the first to stock its third variant of beer, this time cut with grapefruit, when it launched in June 2019.

OTHERS

Wyevale Garden Centres and Sourced Market, with four locations across London, have also given Jubel listings in store.

E-COMMERCE

Jubel is listed with Amazon and Beer Hawk online, with e-commerce REDACTED CONFIDENTIAL DATA. This channel did not exist prior to the rebrand.

3. COMPETING IN THE CRAFT BEER SEGMENT

In the first year following the rebrand (YE Apr 2019),

+184.5%

INCREASE IN SALES REVENUE VS.
THE YEAR PRIOR TO THE REBRAND

+482.4%

SALES HAVE SEEN AN LFL INCREASE
IN THE FIRST SIX MONTHS OF JUBEL'S
SECOND YEAR FOLLOWING THE REBRAND

ON TRADE (LFL)

Even when you discount sales from the off-trade business, value sales have still increased by +64.8% in year 1.

OFF TRADE

Value sales from the off-trade equated to REDACTED CONFIDENTIAL DATA in year 1. That's 42% of total sales for the year, and with major distribution only coming from Sainsbury's in Q3 that makes it even more impressive. And while we can't measure growth in off trade sales from before the redesign, compared to target, Jubel's performance is phenomenal.

It is hard to get exact data on smaller craft brewers to make a meaningful comparison, but we know from some crowdfunding campaigns of other craft breweries, that Jubel is on track to surpass both the volume and value sales of some craft breweries that have been around for 4-5 years, in its second full year of business.

- ① Bedlam Brewery launched in 2015 – according to its crowdfunding in YE March 2019, REDACTED CONFIDENTIAL DATA. At Sept 2019 Jubel was turning over (REDACTED CONFIDENTIAL DATA) with six months left to go in its financial year.
- ② Hiver launched in 2013 – in 2017 its crowdfunding page stated revenue was hurtling towards (REDACTED CONFIDENTIAL DATA) when it had been brewing for four years already.

ATTRACTING NEW CONSUMERS TO THE CATEGORY

Not only is Jubel competing in the craft beer category, but it is driving category growth through its new mass market appeal.

According to CAMRA⁶, beer consumption by gender is 83% male and 17% female. Yet Jubel is 51% male and 49% female, which means Jubel is gaining incremental sales for the category by appealing to a type of consumer who was not previously buying craft beer. The design has been a key factor here in helping to position Jubel in the right way.

CREATING CUT THROUGH

Jesse Wilson, Co-Founder of Jubel, says, "The craft beer market has become very crowded and on a functional level, our beer cuts through the category as it's unlike any other beer style. We feel the brand now matches up to the uniqueness of the product and our brand identity cuts through the category noise both literally and metaphorically."

BEYOND EXPECTATIONS

ATTRACTED INVESTMENT AND SECURED THE BIGGEST GATEWAY TO THE ON-TRADE

One year after the redesign, Jubel secured a minority stake investment from C&C, a 1.5bn turnover company and the biggest gateway to the UK on-trade through its routes to market such as Matthew Clark and Bibendum. Securing this deal has opened up the potential to supply up to 25% of the UK on-trade. It has also funded working capital which allows the brand to ramp up marketing activity and grow the team.

Through the process of discussing the investment with C&C's CMO, the strength of Jubel's strategic positioning, as well as its look and feel, were identified as strong reasons to invest.

TEAM GROWN BY 350%

Due to the growth in sales and the required upscale in business, Jubel has had to employ an extra seven people, taking the team up to nine, to cope with the increased demand.



OTHER INFLUENCING FACTORS

IS JUBEL'S SUCCESS JUST DOWN TO CAPITALISING ON A GAP IN THE MARKET? I.E. THE PRODUCT?

It is true that Jubel has a unique product that is carving its own way in the craft beer market, bridging the gap between beer and cider. However, if it was purely down to the gap in the market, the brand's initial success in the year following its launch would have been greater, particularly when the market had a higher rate of growth at that time:



**IN THE ON-TRADE
CRAFT BEER VALUE HAS
GROWN BY**

+15.7%

IN THE YEAR OF MARCH 2019⁷
COMPARED TO +18.2%
THE YEAR PRIOR⁸

**IN THE OFF-TRADE
CRAFT BEER VALUE HAS
GROWN BY**

+16.4%

IN THE YEAR OF FEBRUARY 2019
COMPARED TO +54.6%
THE YEAR PRIOR¹⁰

Additionally, Jubel is facing increased competition. 'UK supermarket shelves are filling with a huge variety of weird and wonderful flavoured ciders and beer brand extensions in all shapes and sizes, as suppliers try to keep increasingly fickle drinkers interested.' Craft drinkers show no loyalty and are always switching brands, making it harder for brands to establish a following – particularly those brands who are new to the market and without significant advertising budgets¹¹.

And alongside that, there have been many newspaper articles this year reporting that the craft beer bubble is about to burst as the industry matures. Experts at UHY Hacker Young report that it is becoming harder for start-ups to gain a foothold as multinational brewers buy and invest in existing craft and artisan breweries¹². "The number of players is consolidating, and sales growth is going to be harder to come by." Global drinks analyst at Mintel, Jonny Forsyth adds that "the number of brands is outstripping the growth and now people with money are wising up to the market¹². If someone asked me to invest in a craft beer company now, I'd say 'no way, that ship has long sailed.'"

Indeed, a number of smaller craft breweries such as Hop Stuff Brewery, Mad Hatter Brewing Co. and Redchurch Brewery have either gone into liquidation or been bought as part of an administration process.

This makes Jubel's growth more impressive, and more likely to be due to its renewed brand position in the category. In fact, according to research by Kantar, brands are second only to taste when it comes to the factors influencing beer choices, reinforcing the importance of a strong proposition. And in a category that has such variety, it's so important that brands stand out by resonating with consumers' own values, which is what Jubel set out to do with its 'off piste' positioning.

IS JUBEL'S SUCCESS DUE TO A GROWING MARKET?

The UK beer market, in terms of volume, is actually in decline as young people drive the popularity of alcohol-free drinks¹³. However, it is true that value is growing as people drink less but switch to more premium beers.

Specifically looking at craft beer, consumption is just shy of 2.9 million hectolitres, up some 3% over the last couple of years; representing over 500 million pints, and still amounting to around 6.5% of the total UK beer market¹⁴.

However, Jubel's volume increase is way in excess of the market, at +471% in the first 6 months of its current financial year. And even in excess of the on-trade volume growth in fruit ciders at +14.2%¹⁵.

In terms of value, Jubel is exceeding market growth for both on and off-trade as mentioned above, as well as 9 of the top 10 craft beer brands¹⁰. It is also in excess of the off-trade value growth for fruit ciders at +12% and, in particular, brands such as Old Mout (+27%) and Strongbow Dark Fruit (+41%) which are driving the category's growth¹⁶.

WAS JUBEL PURCHASED BECAUSE IT WAS SEEN AS HEALTHIER? I.E. VEGAN-FRIENDLY AND GLUTEN-FREE?

The number of vegans in Great Britain quadrupled between 2014 and 2018 – in 2018 there were 600,000 vegans, equivalent to 1.16% of the population¹⁷. While that would certainly drive extra demand for vegan beer, it has not really been a factor at play in Jubel's success. It is not really advertised as vegan-friendly, and is part of a vastly growing number of vegan beers.

According to Beer Hawk, there's a growing number of breweries that are rejecting the use of gelatin and isinglass in favour of vegan friendly methods, and on its site it lists 281 beers that are all vegan. And Barnivore 'the vegan beer, wine and liquor guide' lists 1,723 beers in the UK that are vegan.

And when it comes to gluten-free beer, The Telegraph declared 2015 the year that gluten-free beer went mainstream¹⁸. When Jubel first launched in May 2017, breweries had already had two years on Jubel and established it as a product portfolio must-have.

The bigger health trend at play in the craft beer category is actually consumers reducing their alcohol consumption. And according to Mintel, of the 36% of buyers who reported cutting back on alcohol, 45% were under 35s – the segment where the majority of craft beer drinkers sit¹⁹. So, if anything, health would be a reason not to buy Jubel at all. Particularly as there has been a 30% growth in no or low alcohol beer since 2016 and some 40 new product launches in the last two years¹³.

HAS JUBEL RIDDEN ON THE SUCCESS OF THE FRUIT INFUSION TREND?

Sales of fruit ciders are indeed flourishing, with value sales up +15% on volumes up +14.2% in 2018¹⁵. Westons attributes this growth to the vast number of consumers seeking out sweeter, refreshing flavours, yet Jubel was targeting consumers who wanted to bridge the gap between cider and craft beer – i.e. sweeter than beer, but less so than traditional or fruit cider.

JUBEL'S SALES INCREASES WERE WAY IN EXCESS OF THE FRUIT CIDER MARKET AS PREVIOUSLY STATED.



WAS THE SALES INCREASE DUE TO NEW VARIANTS? THE 'URBAN' ELDERFLOWER VARIANT WAS LAUNCHED AT THE TIME OF THE REBRAND AND ACCOUNTED FOR ONLY 30% OF THE YEAR'S SALES.

'Coast' the grapefruit variant was launched in June 2019 and is not included in year 1 figures.

WAS IT DUE TO ADDITIONAL PR AND/OR MARKETING SUPPORT?

Jubel's marketing budget in the year following the rebrand was in line with its budget the year prior to the rebrand. For its second year post rebrand, the business has been able to increase it by 40% to support brand growth, due to the brand's success so far. This is far below the growth in sales that they have experienced in the first 6 months of Y2 at +482.4%.

In terms of activity, Jubel did a small three-month national PR project from June to August 2018. The beer was listed in Sainsbury's in November 2018 and sales for its first month equated to +155.5% more than with the PR campaign. The PR activity clearly did not have as big an impact on sales, compared to the strength of the brand securing such a strong and broad listing in a major retailer. (REDACTED CONFIDENTIAL DATA)

Additionally, for two weeks in January 2019, Jubel visited 250 Sainsbury's stores in a van. #vanuary was a PR stunt that picked up some trade press coverage and was named one of The Drinks Business' campaigns of the month. Sales in the off-trade increased by an additional c.50% for January but returned to levels comparable with previous months after that.

WAS IT DUE TO PROMOTION?

Jubel do not sell on promotion – a policy stemming from Sainsbury's where there are no promotions on craft beer'

WAS IT DUE TO INCREASED DISTRIBUTION?

It's fair to say winning a major retailer is going to have a huge impact on sales, yet, even when you remove data from the off-trade business, value sales still increased by +64.8% in year 1.

IS IT BECAUSE SUPERMARKETS/RETAILERS ARE BECOMING MORE FAMILIAR WITH CRAFT?

In April 2019, The Grocer reported that now the supermarkets are comfortable with the ins and outs of craft, they're becoming more ambitious in personalising their ranges and standing out from the crowd²⁰. While this is good for small brewers, it can also be extremely difficult for them to manage as anything that doesn't perform will be ousted in favour of something else.

JUBEL WAS ACTUALLY APPROACHED BY SAINSBURY'S ON THE STRENGTH OF ITS BRANDING AND PROPOSITION

Jubel was actually approached by Sainsbury's on the strength of its branding and proposition, which was strategically aligned with the retailer's ambitions to carve out new categories and be a point of difference for its shoppers. And the retailer obviously knows its customers well, as not only has Jubel driven incremental sales of 62% for the retailer, proving that it is offering something different in the category, but Sainsbury's more than doubled its distribution to 1,300 stores in April 2019.



RESEARCH RESOURCES

1. **MINTEL 2017**
2. **THE GROGER BEER & CIDER CATEGORY REPORT 2017**
3. **BRITISH BEER & PUB ASSOCIATION ANNUAL BEER BAROMETER 2017**
4. **WESTONS CIDER**
5. **BMG (MAY 2018) VEGANISM IN BRITAIN TODAY: SEVEN KEY FACTS**
6. **CAMRA IN THE INDEPENDENT**
7. **CGA IN MARSTONS BEER REPORT, 2018**
8. **CGA IN MARSTONS BEER REPORT, 2019 YOUNG PEOPLE DRIVE POPULARITY IN ALCOHOL FREE DRINKS**
9. **KANTAR IN THE GROGER, 2018**
10. **KANTAR IN THE GROGER FOCUS ON BEER & CIDER 2019**
11. **THE GROGER (JUN 2019) WORLD BEERS, FOOD PAIRING AND THE THREAT TO CRAFT**
12. **THE TELEGRAPH (FEB 2019) CRAFT BEER BUBBLE BURSTS WITH GLUT OF NEW BRANDS**
13. **THE TELEGRAPH (JULY 2019) SALES IN BEER FALL BY A THIRD IN 10 YEARS AS YOUNG PEOPLE DRIVE POPULARITY IN ALCOHOL FREE DRINKS**
14. **UK BRITISH BEER & PUB ASSOCIATION (2019)**
15. **WESTONS CIDER REPORT 2019**
16. **DRINKS RETAILING NEWS (MAY 2019) FRUIT CIDER: GOING TO THE DARK SIDE**
17. **THE VEGAN SOCIETY**
18. **THE TELEGRAPH (SEPT 2015) HOW WE ALL WENT CRAZY FOR GLUTEN-FREE BEER**
19. **MINTEL (AUGUST 2018) ATTITUDES TOWARDS CRAFT ALCOHOLIC DRINKS - UK**
20. **THE GROGER FOCUS ON BEER & CIDER 2019**