

On-trade reopening post-COVID: Welcome back from Enotria&Coe



Welcome back

Undoubtedly, these months have been challenging, and have forced us to adapt rapidly to the changing world.

At Enotria&Coe, we noticed very early on how much we missed connecting with our customers, learning about your business and your consumers.

We are very much looking forward to re-establishing that connection with you and building on the foundations of our relationship. That is why we have pulled together this welcome back mini-catalogue, to help you get your business off the ground and adjust to the demands of the post-COVID market.



Top 5 Industry Trends 2020

In January 2020, Enotria&Coe published **“The Top 5 Industry Trends 2020”**.

As lockdown all but closed down the UK's on-trade since March 2020 and forced consumers to overhaul their buying habits practically overnight, we have watched how these changes have affected our original Top 5 trends.

We believe that the lockdown has fundamentally accelerated trends that were evident at the beginning of the year, with a few exceptions.

We have seen how other countries have reacted since their lockdowns were lifted; some of this may indicate imminent consumer behaviour in the UK, although this will not always necessarily be the case.



Updated trends in post-COVID UK

The “Top 5 Industry Trends in post-COVID UK” we have identified are:



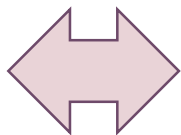
1. Health



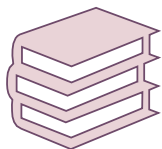
2. Convenience



3. Support local



4. Polarisation

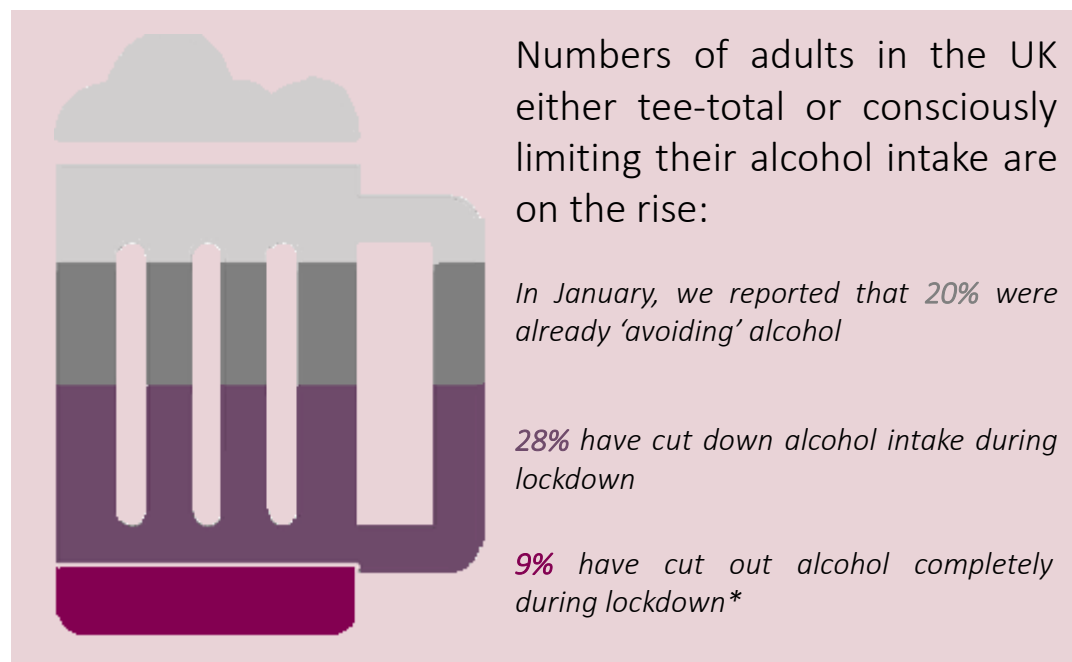


5. Education



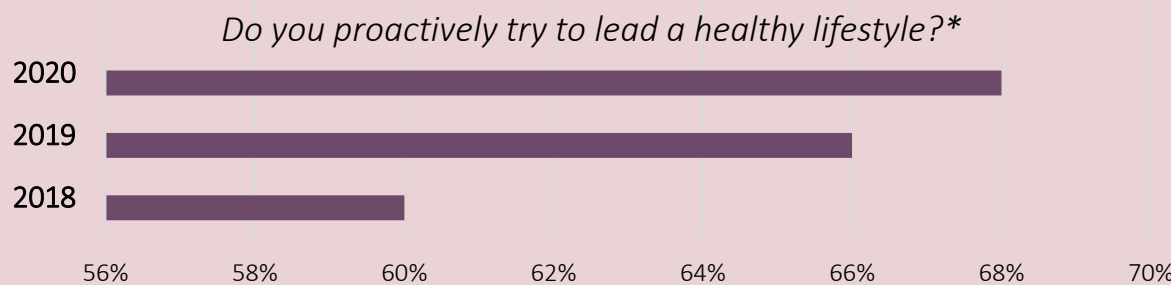
1. HEALTH: *Healthy imbibe, healthy body*

It stands to reason that we have become more health-conscious in the wake of a pandemic and global health crisis.



We can expect to see the existing trend towards low & no and healthy drinks accelerate as a result of COVID.

Consumers have been becoming increasingly health-conscious, which in turn affects their drinks choices (both what they drink, and how frequently, or in what quantities).



Over 50% adults who usually drink alcohol, have now tried a low&no alternative at least once

1. HEALTH: *Our top products that will fill this gap*

What is it?

What products do we have?



Premium soda alternative mixers, especially crafted for different spirit categories.

- Gin & Vodka mixer
- Whisky & Bourbon mixer
- Tequila & Mezcal mixer
- Light & Spiced Rum mixer



Bristol brewery powered by 100% renewable energy and powering the South West with unfiltered, natural beers, including this low-alcohol variant.

- Small Beer cans



Celebrating what goes into a drink, rather than commiserating what you've taken out. Alcohol-free botanical drinks packed with flavour.

- Livener
- Nightcap
- Elixir



A pioneering, luxury CBD brand, harnessing the health benefits of CBD in the most potent products available in the UK. Take care of your health without sacrificing your lifestyle.

- CBD bitters
- CBD Amplify Shot
- CBD Balance shot
- CBD Focus shot
- *Coming soon* - CBD seltzer range

2. CONVENIENCE: *Delivering thoughtful service*

Months of lockdown have raised people's expectations for convenient service and convenient serves.



10% of the population now uses food-delivery services – that is

6 million people nationwide

70% of home-delivery service users say they are motivated by **convenience***

Consumers are enjoying this newly discovered convenience. Once lockdown is over:



61% would continue ordering from restaurants



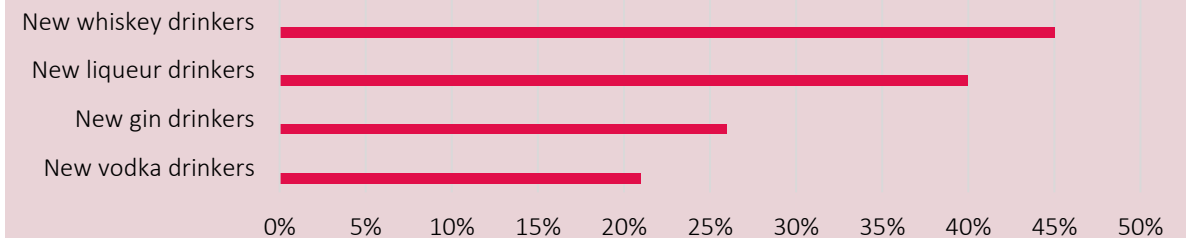
70% would continue ordering from takeaways



42% would continue virtual gatherings**

As we expect consumers to continue at-home consumption to some extent even after lockdown is lifted, we predict that **convenient serves** will continue to gain popularity.

The categories that have gained the most new drinkers during lockdown lend themselves to simple serves with minimal ingredients and complexity:



We expect this trend will favour simple serves such as highballs, premium mixers and seltzers/spritzes

New drinkers to the category as a % of people who previously chose this in the on-trade

Compare this to **trend 5**, which shows the importance of your staff **demonstrating ease of serves** to educate and inspire your customers.

2. CONVENIENCE: *What does this mean for your business?*

We encourage you to weigh up what levels of service your customers now expect, and what flexibility you need from your suppliers.

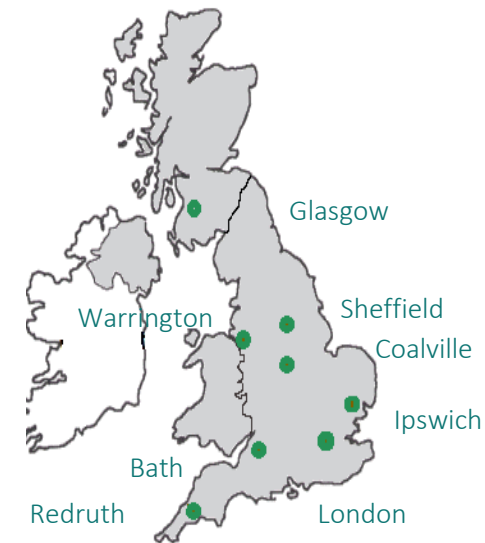


Deliver convenience to your customers' with easy serves and cocktail packs.

Do you aim to return your business to “normal”, or do you predict a shift towards a “new normal” that incorporates more reliance on delivery to your customers?



Take advantage of our brand support and marketing budgets to enhance your customers' experiences, while delivering convenience on their terms.



With 8 regional depots, E&C supports you with day-1-for-day-2 delivery (exc. Scotland) and can accommodate emergency deliveries

3. SUPPORT LOCAL: *Get your low-carbon footprint in the door*

Building on growing consumer interest in demonstrable sustainability, there is now a new focus on supporting local businesses, particularly those that play a part within their communities.

35% are concerned about travelling to outlets in city centres

*By comparison, only 23% are concerned about visiting local outlets**



33% have supported or plan to support local business

75% of consumers are more likely to support businesses that behaved ethically during lockdown, including supporting the local community*



The drive behind 'support local' is partly driven by consumers quickly getting used to the convenience of lockdown deliveries, and partly due to anxiety around public transport.

+ 68%

A month into lockdown, local shops were up by 68% in sales**

18% of the UK plans to continue shopping locally after lockdown**



Compare this to **trend 4**, which shows **recession-worries** leading consumers to cut out big brands; supporting local is seen as better **value for money**

3. SUPPORT LOCAL: *How E&C will fill this gap*

Our products:

What is it?

What products do we have?



English sparkling wine by Emma Rice, two-time winner of UK Winemaker of the Year. “Unapologetically British.”

- Classic Reserve
- Demi-Sec
- Blanc de Blancs
- Rosé



Award-winning whisky and gin using locally-sourced botanicals and ingredients. “Outstanding Natural Spirits” from an Area of Outstanding Natural Beauty.

- Cotswolds Dry Gin
- Cotswolds Single Malt Whisky
- Cotswolds Founder’s Choice Whisky
- Cotswolds Cream Liqueur



Canterbury-based ciders from a fourth generation family business.

- Craftsman Cider
- Skylark Cider

And our services:



Regional hubs for flexible delivery and a network of local National Account Executives.



Digital strategy consultation to make your business more “human” and localised to each consumer.



An environmentally-minded and sustainable supply chain from source to point of delivery, giving you peace of mind.

4. POLARISATION: *Taking the pole position*

At the beginning of the year, most industry pundits were shouting about 'premiumisation'. Now, we are predicting a marked shift towards polarisation.

The bulk of the market will become more conservative.

Standard products will continue to drive growth for new-to-market, such as the YOY growth of 4.3% in pink gin.***



The consumers most enthusiastic to return to the on-trade are younger, and make more sophisticated menu choices.

These consumers will continue to drive premiumisation.

Consumers are conscious that the UK is heading into a recession, and are planning how they will adapt their spending habits*

50% of consumers will stop treating themselves to 'luxuries'



42% of consumers will switch to own-label products to save money

The premium posse

Once lockdown is lifted...



16% plan to order more premium food



15% plan to spend more per visit



14% plan to visit more premium outlets



8% plan to order more premium drinks

Compare this to *trend 5*, which shows the importance of your staff *demonstrating ease of serves* to educate and inspire your customers.

4. POLARISATION: *What does this mean for your business?*

E&C prides itself on offering customers a suite of value-add services.

As your trusted partner, your E&C Account Manager will be happy to conduct a menu consultations where they can help you strategise:



Which direction you would like to see your business take



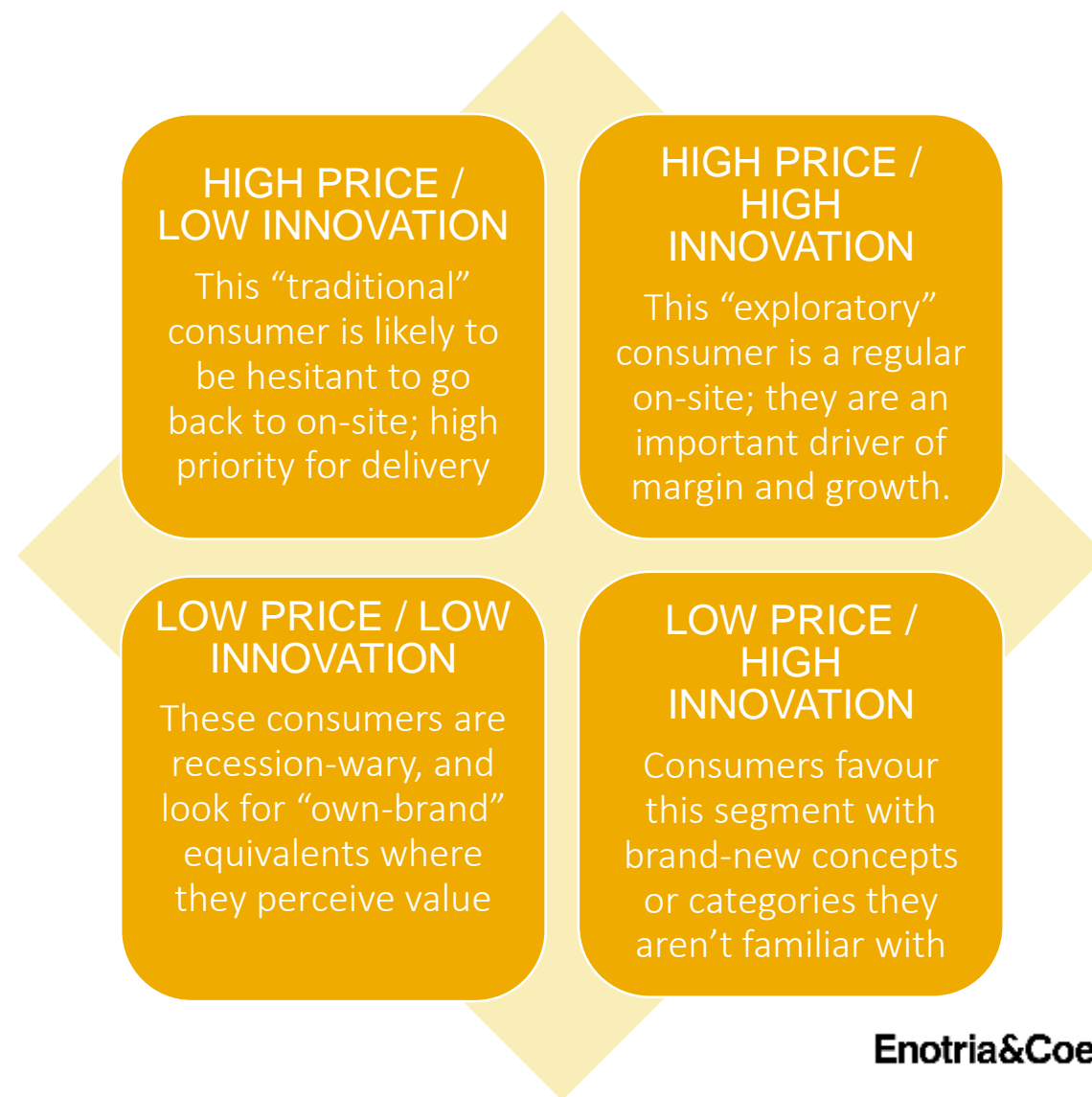
What poles your customer base will be split between, in terms of palate and price sensitivity



Whether you choose to narrow down your specialism, or address multiple segments



Which products will be right for your list to meet your strategic goals



5. EDUCATION: *Educators as influencers*

Your staff have never been more valuable to your business.

As higher-margin, repeat customers become more curious and motivated to engage with the stories and techniques behind their drinks, staff have unprecedented potential to inform buying behaviour.



*65% of consumers who previously visited on-trade outlets at least once a week will be comfortable visiting drink-led venues as soon as minimal precautions are in place**

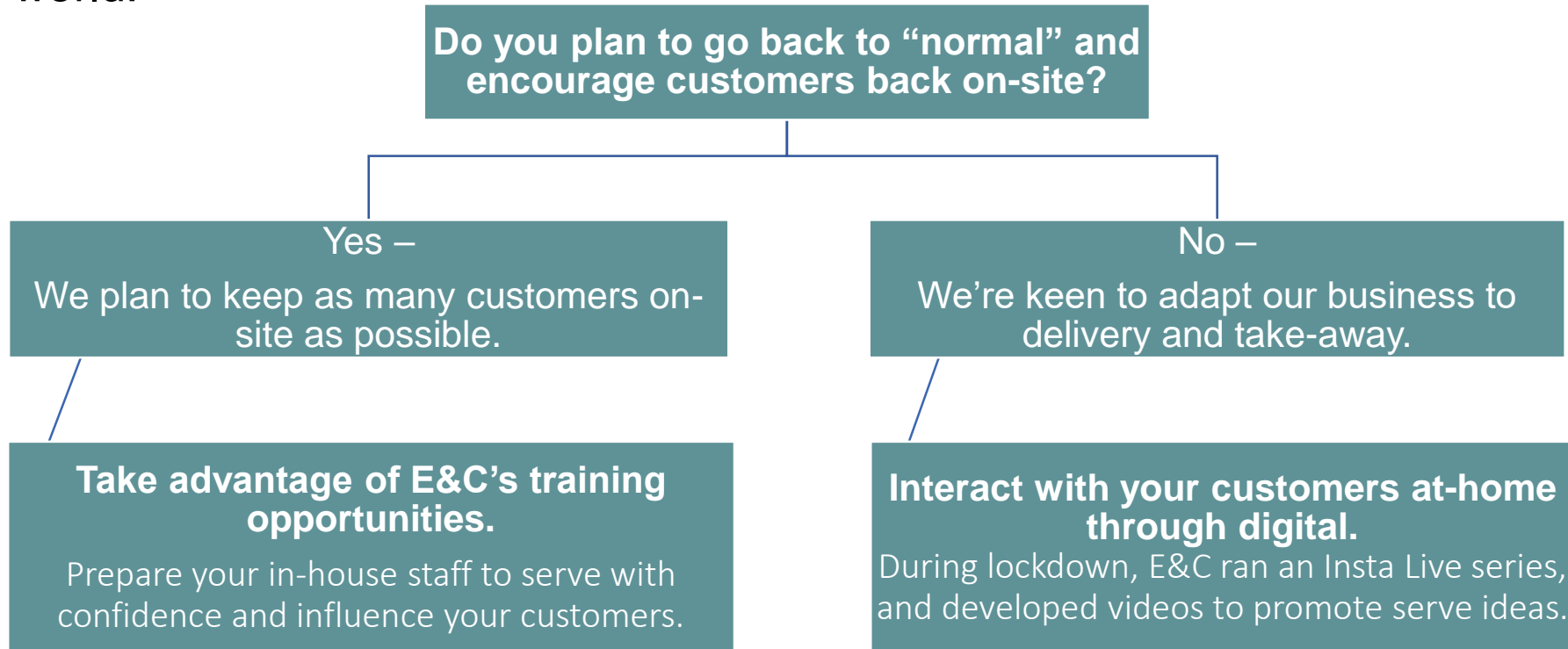
It is key that your staff are educated about the brands you carry, so that they can influence your customers and drive brand loyalty. As the recession bites, consumers will want to perceive value in their choices.



5. EDUCATION: *What does this mean for your business?*

We would advise you to prepare for this trend based on how you foresee your business adapting to the post-COVID world:

Speak to us to find out more about these value-add services, and how we can tailor them to your needs.



Products to kick-start your business

Inspired by the trends we have identified in the post-COVID market, we have pulled together a distilled version of our portfolio.

We have worked with our producers, our supply chain and across our distribution for a range that:

- Will resonate with consumers
- Will have enhanced stock availability
- Will guarantee keen pricing

These are the highlights of our list, intended to be indicative of our range. Please speak to your Account Manager for more products or information.



Wines



Spirits



Beers & ciders



Low & No

Key:

13%

% ABV



Featured on E&C's Insta Live



Organic





Vegan



Biodynamic

Vegetarian











Starter-pack: white wines

Producer	Wine	Region	Tasting notes	Notes
  Serevin.	2019 Free-Run Steen Chenin Blanc	Western Cape, South Africa	Guavas, melon, citrus	13%
	2018 Sauvignon Blanc	Marlborough, New Zealand	Yellow peach, gooseberry, citrus	13%   
LOUIS MICHEL & FILS	2018 Chablis	Chablis, France	Peach, pebbles, lemon	12.5% 
 VERUM <small>Religios y Vitícolas</small>	2016 Ulterior Albillo Real Parcel 7 & 9	Castilla-La Mancha, Spain	Cinnamon, quince, red apple	12%  
 TRIMBACH	2016 Gewürztraminer	Alsace, France	Roses, lychees, geranium	14%  

Starter-pack: red wines

Producer	Wine	Region	Tasting notes	Notes
	SIERRA CANTABRIA DESDE 1870 2018 Estacion 1883 Malbec	Mendoza, Argentina	Raspberry, red cherry, violet	14%  
	2017 The Stump Jump Cabernet Sauvignon	South Australia, Australia	Mulberry, crème de cassis, violets	14.5% 
	CRianza 2016 Rioja Crianza	Rioja, Spain	Cherry, spice, cocoa	14%
	2015 Campomaggio Chianti Classico	Tuscany, Italy	Red and black cherries, balsamic	13% 
	2018 Pinot Noir	Wairarapa, New Zealand	Red berries, black plums, spice	13%  

Starter-pack: rosé & sparkling wines

Producer	Wine	Region	Tasting notes	Notes
	2019 Rioja Rosado	Rioja, Spain	Lemon, grapefruit, strawberry	12.5% 
	2019 Rosé de Léoube	Provence, France	Honey, red fruit, mint	13%  
	NV Prosecco Extra Dry	Veneto, Italy	Wisteria blossom, acacia, apples	11% 
	NV Baron de Marck Brut Champagne	Champagne, France	Apples, lemons, brioche	12.5%
	NV Classic Reserve Brut Rosé de Léoube	Hampshire, UK	Hedgerow flowers, green apples, toast	12% 

Starter pack: spirits – whiskey

Producer



STARWARD

BRENNE

LOT^{NO}40™

HAIG CLUB

Maker's
Mark

Product

Single Malt
Founder's Choice Single Malt

Two-Fold Double Grain
Nova Single Malt

Cuvée Spéciale Single Malt

Rye Whisky

Single Grain Whisky

Bourbon

Region

Cotswolds, UK

Melbourne,
Australia

Cognac, France

Canada

Scotland, UK

Kentucky, USA

Tasting notes

Butterscotch, apricot, marmalade
Dark chocolate, fig, cherry pie

Red fruits, pastry
Berries, caramel, tropical

Banana, coconut, crème brûlée

Rye, walnut, toffee

Brioche, coconut, vanilla, toffee

Butterscotch, vanilla, peel

Notes

46%
60% 

40%
41% 

40%  

43%

40% 

45% 

Starter pack: spirits – vodka, gin, tequila

Producer	Product	Region	Tasting notes	Notes
KONIK'S TAIL	Vodka	Białystok, Poland	Caramel, nutty, pepper	40% 
FINLANDIA	Vodka	Finland	Smooth, clean, barley	40% 
AUDEMUS SPIRITS CRÉATEUR DE SPIRITUEUX	Pink Pepper Gin	Cognac, France	Pink pepper, tonka, cardamom	44% 
Puerto de Indias SEVILLAN GIN PREMIUM	Strawberry Gin	Andalucia, Spain	Strawberry, floral, juniper	37.5% 
WARNER'S	Victoria's Rhubarb Gin	Northamptonshire, UK	Fragrant, crisp rhubarb, soft	40% 
BROCKMANS	Premium Gin	Cheshire, UK	Smooth, bitter peel, distinctive	40% 
SIPSMITH London	London Dry Gin Orange & Cacao Gin (50cl)	London, UK	Zesty, citrus dessert, dry Orange peel and blossom, rich chocolate	41.6% 40% 
GREENALL'S	Wild Berry Gin	Cheshire, UK	Luscious, juicy berries, warm spice	37.5% 
el Jimador TEQUILA	Blanco Tequila	Mexico	Fresh, clean, smooth	38% 

Enotria&Coe

Starter pack: spirits – rum, liqueurs, fortified & RTDs

Producer	Product	Region	Tasting notes	Notes
	Signature Cacao' Mon Espresso Rum Cream Liqueur	USA	Molasses, coconut, vanilla Coffee, oak, chocolate Hazelnut, vanilla, chocolate	37.5% 35% 17% 
	XO Café Liqueur	Mexico	Coffee beans, chilli, black pepper	35% 
	Lively White Vermouth (50cl) Daring Dry Vermouth (50cl) Wild Rosé Vermouth (50cl) Bold Red Vermouth (50cl)	Australia	Grapefruit, sage, lemongrass Anise, myrtle, thyme, olive leaf Tropical, hibiscus, fig Wattleseed, pepperberry, thyme	16.5% 18% 16.5% 16.5% 
	Negroni (100cl) Espresso Martini (100cl)	UK	Classic: gin, herbal liqueur, vermouth Classic: vodka, coffee liqueur, espresso	20% 15% 

Starter pack: beers

Producer	Product	Region	Tasting notes	Notes
	Beer	Japan	Dry, crisp, <i>Karakuchi</i>	5.2%
	Punk IPA	Aberdeen, UK	Grapefruit, pineapple, lychee	5.6%
	Nastro Azzurro	Italy	Refreshing, passion, flair	5.1% 

Starter pack: softs & mixers

Producer



Product

Gin & Vodka mixer
Light & Spiced Rum mixer
Whisky & Bourbon mixer
Tequila & Mescal mixer

Crisp Citrus
Dry Apple
Fiery Ginger
Lemon & Ginger
Original Soda Orange

Classic Tonic
Indian Tonic
Soda Water
Ginger Ale

Passion Fruit Purée (5 x 1kg)
Strawberry Purée (5 x 1kg)

Indian Tonic Water
Refreshingly Light Tonic Water
Spring Soda Water
Ginger Ale
Premium Lemonade

Region

London, UK

Germany

London, UK

UK

London, UK

Tasting notes

Raspberry, rose, sage
Lime, mint, rose, cacao
Sicilian orange, rosemary, gentian bitters
Prickly pear, fig, cardamom

Citrus, pink grapefruit
Tart, cider, bite
Punchy, sharp
Sunny, subtle
Refreshing, lightly sparkling

Citrus, quinine, juniper
Calamansi, chinotto, juniper
Balanced, smooth
Ginger root, aniseed

Ecuadorian passion fruit, vibrant
32 strawberry varieties for harmonious perfection

Quinine, bitter oranges
Subtle, botanicals, quinine
Delicate, silky, fine
Ginger, citrus, clean
Freshly squeezed lemons, crisp

Notes

0%



36 CAL

0%



0%



0%



0%



Enotria&Coe

Starter pack: seltzers

Seltzers have been tipped to become this summer's next big thing, following a meteoric rise in the US.

Our carefully selected seltzers also appeal to concurrent and complementary market trends, such as luxury CBD.



OTO CBD

CBD seltzer, 0% ABV

Brand-new to market, August 2020

Easy route into seltzers for the health-conscious consumer

Exclusive to E&C

0% No alcohol



Vegan



No sugar

CAL

Low calorie

Available flavours:

- Korean Sencha, Mint & Kampot Pepper
- Bitter orange, Goji Berry & Habanero Chilli
- Elderflower, Cucumber & Liquorice

Enotria&Coe

Innovative value-add services

Enotria&Coe, believes in supporting your business holistically through a range of value-add services.

We are with you every step of the way to make onboarding our award-winning products a success for your business.

Premises Licences



We have developed a turnkey solution providing an expedited process to acquire a Premises Licence. Leveraging additional margin from drinks sales, and providing customers with a one-stop-shop is an efficient way to maximise your profits in this climate.

Instagram Live tastings



During lockdown, we have kept our producers and customers engaged through a series of Instagram Live tastings. This content is available to you, and we can harness our expertise in digital to advise you on crafting bespoke content for your audiences.

Drinks inspo videos



If your talented staff can't interact with consumers, use video clips to share recommendations, inspire choices, introduce new products and demonstrate how to achieve the on-trade atmosphere from home.

Supporting you with flexible payment terms

We understand that finding the capital to gear up your business after the lockdown might be challenging.

Enotria&Coe wants to be supportive of our valued network at this time.

If you would like to discuss what additional help we can offer in extending flexibility to you on payment terms and/or credit terms, please speak to us:

Sales.Operations@enotriacoe.com



For further information about our products and services, speak to your Account Manager or contact us on any of the following:



020 8961 5161



Sales.Operations@enotriacoe.com



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Enotria Winecellars Ltd,
23 Cumberland Avenue
London
NW10 7RX