

Annual Updates 2013 - 2014

Responsibility Deal Pledge:

A8(a). Alcohol Unit Reduction

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Pledge A8(a). Alcohol Unit Reduction

“As part of action to reduce the number of people drinking above the guidelines, we have already signed up to a core commitment to “foster a culture of responsible drinking which will help people drink within guidelines”.

To support this we will remove 1bn units of alcohol sold annually from the market by December 2015 principally through improving consumer choice of lower alcohol products.”

Partner name:	Please list the actions that your company has undertaken in the last reporting year (e.g. product reformulation, serving size control, new product development, supportive promotional or marketing activity) and where possible provide data to indicate the scale of the activity.
AB InBev UK	<p>AB InBev UK has made a significant contribution to the unit reduction pledge by removing 111 million units of alcohol from our core brands Stella Artois, Budweiser and Beck's. We did this by reducing the ABV from 5% to 4.8%.</p> <p>We remain committed to promoting responsible drinking and improving consumer choice. As such, we continue to promote Beck's Blue, the most popular alcohol-free beer in the UK, as well as lower alcohol options such as Beck's Premier Light at 2.3% ABV.</p>

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Accolade Wines

Accolade Wines shares the Government's aim of reducing the social and health harms caused by excessive alcohol consumption. As a responsible alcohol producer we believe we have an important role to play in tackling alcohol misuse. It is in the interest of our business, the individual and society as a whole that our wines and other alcohol beverages are enjoyed responsibly.

We originally committed that we would remove 25m units from our Californian Rose portfolio by December 2015. We are able to report that we are making good progress towards our unit reduction target.

Wine is an "agricultural product" and is very much subject to the vagaries of climate. In recent years California has suffered drought conditions. This has made reducing alcohol strength while retaining the aroma, flavour and quality our consumers expect more of a challenge. Consequently our winemakers have looked at the unit reduction opportunity across our entire US varietal range, not just our USA Rose wines.

A key driver of progress has been the 1% ABV reduction - from 11% to 10% ABV - in our USA White Zinfandel varietal across 6 branded SKUs. Additionally, we have reduced the alcoholic strength by varying amounts across:

Echo Falls US Merlot

Jack Rabbit US Merlot

Whispering Hills US Merlot

Echo Falls US Chardonnay

Jack Rabbit US Chardonnay

Whispering Hills US Chardonnay

Echo Falls US Grenache Rose

Echo Falls US Pinot Grigio

Vendange US Pinot Grigio

Echo Falls US Red

Paul Masson US Red

Turner Road US Red

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	<p>Turner Road US White</p> <p>Turner Road US Chardonnay / Pinot Grigio</p> <p>Turner Road US Rose</p> <p>We continue to believe that there are exciting opportunities in the low and no-alcohol sectors and in 2014 will build on what we have learned with Banrock Station Light at 5.5% ABV. Critical to the growth of both sectors is quality/value for money and strong feature in store and on premise.</p>
<p>Aldi Stores Ltd</p>	<p>We expanded our lower alcohol product range in 2013 to offer our customers a great choice of lower alcohol options. 16 lower alcohol products have been introduced or reformulated and promoted to our customers via our website and weekly specials leaflet.</p> <p>These include:</p> <p>Harvest Cellars: Bucks Fizz (4%), Belletti: Bellini (4%), Bvcespana Sangriana (5%), Liebfrumilch White (9.5%), Eiswein (8.5%), Gluwein (10%), Hope River Silver Series: Sparkling Ros��, Sparkling Merlot Ros��, Sparkling Chardonnay and Sparkling Pinot Grigio (5.5%), Grove Manor: British made Sparkling Ros�� (5.5%), British made Ros�� Wine (8%), British made White Wine (8%), Moscato Spumante (6%), Brasserie Beer Blonde (2.6%), Brasserie Shandy (0.9%) and Manns Brown Ale (2.8%). In addition, in 2013 we released a Weight Watchers White and Rose wine at 8.5%.</p>
<p>ASDA</p>	<p>As a result of our national delisting measures, reducing the ABV of some of our own-brand products and significantly increasing the space we give to lower ABV products, we continue to make significant unit reductions in our portfolio.</p> <p>This year we are building on our significant reformulation and product delisting measures with positive steps to promote lower strength products, in line with customer demand.</p> <p>We have launched 17 new lines of lower strength beers and ciders at 2.8% ABV and below and five Sritzini aromatised wine-based cocktails at 4% ABV, supported by extensive merchandising and marketing materials, including in the Asda Magazine. 200 stores have a full lower ABV bay with eye-catching point of sale. We are looking for around 30% growth in this category as a result.</p> <p>We have delisted our own-brand 2lt pear cider and reduced the ABV of own-label spirits. We have also introduced two new own-brand 0% ABV flavoured beers.</p>

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**Association of
Convenience
Stores (ACS)**

ACS continues to actively promote this pledge to the 33,500 small shops in membership, and provides advice and support for members to help them implement policies that contribute to the aim of achieving the 1 billion unit reduction. Since committing to this pledge we have engaged directly with small shops via one to one meetings, larger roundtables, email correspondence, event presentations and website communications to highlight how this pledge can be part of their business model.

ACS is committed to supporting responsible retailing practices in the convenience sector. To support members in adopting and sharing best practice, ACS hosts a number of events, including our biannual Responsible Retailing Forum, and we help to showcase innovations across the industry to ensure small shops are a constructive partner in their communities. Publicising the unit reduction pledge and our members effort to support this remains one key way in which we demonstrate our commitment to responsible retailing.

ACS welcomes the significant progress announced in the recent interim report on the progress of the pledge, which showed the removal of an additional 253 million units as a direct result of pledge signatories. Convenience stores have, and will continue to have, a key role in delivering these results, and ACS will continue to support them in this aim.

**Bacardi
Brown-Forman
Brands**

We continued to provide a range of products of differing alcohol strengths which provides consumers with choice in this area. We have also continued, in line with this pledge, to promote responsible drinking awareness and messages into the trade e.g. directed at on trade retail staff; as well as supporting Drinkaware's activities. The ABV on some SKUs has been reduced and new products at a lower ABV than the parents brands have been introduced.

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Bestway (Holdings) Limited

Bestway Wholesale have actively supported the alcohol reduction pledge throughout 2013 and 2014 on branded and own label products. We have supported the launch of new low ABV% products in many wines, beers and cider categories with our manufacturers and actively promoted products that have reduced their ABV%.

In the Beer category, Low ABV% products have improved their market share from 0.33% to 4.92%. There was a 5.3% like for like uplift in volume sales.

In the Cider category, Low ABV% products have improved their market share from 1.5% to an impressive 16.9%. There was a 9.03% like for like uplift in volume sales.

In the Wine category, Low ABV% products have improved their market share from 0.44% to 2.99%. That is a 6.3% like for like uplift in volume sales.

Overall Sales of Low ABV% products in the License Category have improved market share by 1.07% with over 65,000 more low ABV% cases sold this year.

The total alcohol units saved between April 2012 - Mar 2013 were 8.42 mil. This year between April 2013 - Mar 2014 we have increased the total alcohol units saved to 9.42 mil units

Please note that savings of units sold is calculated based on average category ABV% to product ABV% (Based on average Beer ABV% being at 4.5%, Cider at 5.5% and Wine at 12.5%).

Bestway Wholesale have removed over 9.4 million units of alcohol by supporting the sale of low alcohol products during the past 12 months and continue to pledge to reduce the numbers of alcohol units sold in the future.

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<p>Bibendum Wine Ltd</p>	<p>2013 has seen a further move in the market towards creating lower alcohol offerings for the consumer.</p> <p>We, at Bibendum Wine Ltd. introduced a white and rose lower alcohol wine at 5.5% abv to offer in both on and off trade channels.</p> <p>We created 2 fruit flavoured wine coolers from South America.</p> <p>We have a new French supplier for a 5.5% wine based drink.</p> <p>We introduced a new Italian Moscato option at 5.5% for on-trade customers.</p> <p>Our buyers and winemakers have actively encouraged suppliers (especially in higher alcohol, warm climate new world countries) to reduce high alcohol wines by using different techniques and picking the grapes at a lower degree of potential alcohol.</p> <p>We forecast that for 2014 there will be a reduction of 320,000 units.</p>
<p>Booker Group plc</p>	<p>Booker continues to encourage consumers to adopt a responsible approach to alcohol consumption through its support for Drinkaware and clear on-pack labelling of alcohol units and NHS guidelines.</p> <p>We have removed 1.6 million abv units from consumption this year in like for like sales of reduced abv own label and exclusive beers and wines.</p> <p>We continue to support sales of other brand owners' low abv beers, wines and liqueurs</p>
<p>Brand Phoenix Limited</p>	<p>Recently FirstCape introduced a further 4 sparkling products to its 5.5% alcohol wines. We now have 12 products in our lower alcohol range. Our Light Sparkling wines only have 4.1 units per bottle compared to 9 units in a standard sparkling bottle. In the last year we have sold 455,351 cases of lower alcohol wines all at 5.5%, which would have had a huge impact on unit consumption.</p>

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British Beer & Pub Association

As well as contributing funding towards the cost of monitoring and evaluating this pledge, the BBPA provides support for members that have signed up to the pledge in calculating and reporting unit reduction achieved either through reducing the strength of products, developing new beers at lower strengths and promoting smaller servings. Brewers have taken a lead in this area, removing over 250 million units from the market in the first year as highlighted in the recently published DH report.

BBPA has continued to promote low alcohol beer as a category to consumers and in the media, and this year has worked to promote and showcase greater uptake and support for this pledge in the on-trade. This is occurring in a range of ways including the stocking and promotion of lower alcohol products in pubs, lowering the abv of house wines and promoting smaller servings.

C&C Group plc

We continue our innovation of lower strength products. The launch of lemon T at 2.8% ABV is significantly lower than our core lager brand Tennent's which has an ABV of 4%. This new innovation received the majority of our above the marketing support for Tennent's over the last 12 months. This product aims to encourage consumers to drink lower strength products.

Other innovations included the continued rollout of Caledonian best ale. At only 3.2% ABV it is significantly lower than the industry average for beer. It has been subject to an advertising campaign and a rugby sponsorship promotion.

In cider, we launched a new brand of American cider called "Hornsby's". At 4% ABV, this product is significantly lower than the cider average.

Our biggest impact is that we have removed the high-strength white cider brands from our portfolio.

We have also launched smaller pack sizes, 330 ml cans of K cider.

We are on track to deliver a unit reduction of 30m units.

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<p>Carlsberg UK Ltd.</p>	<p>Carlsberg UK has started to deliver on its commitments by reducing the ABV of existing brands and has recently introduced a low ABV beers (less than 2.8%). We remain committed to providing products at ABVs of 2.8% and below. We now offer 6 products in our portfolio with an ABV of 2.8% or below, including Holsten Alcohol Free beer.</p> <p>Last year we are launched a 2.8% beer, Carlsberg Citrus, which versus the average strength in the category is a reduction of over 11million units. In 2014, we will be launching a second variant at 2.8%</p> <p>In 2013, we reduced the ABV of another major brand, Tuborg, which will took a further 7m units out of the market.</p> <p>Clearly, with overall consumption reducing, these reductions may not result in achieving the figures quoted, but assuming current volumes, Carlsberg UK's contribution to the pledge will now total around 35 million units.</p> <p>for more information please visit our 'engaged with society' CSR website - engagedwithsociety.co.uk</p>
<p>Co-operative Group (The)</p>	<p>In 2013, we reduced alcohol levels (ABV) of our own-brand cider from 5.3% to 5.0%. We estimate that this ABV reduction will result in alcohol unit reduction of over 46 million units. Other ABV reductions of own-brand products include: Traditional Bitter (3.5% to 2.8%); Strong Export Ale (5% to 4.5%) and Canned Bitter (4% to 3%). During 2013 we also took the decision to remove from sale own-brand Superstrength Lager (7.5%) and 3L PET bottle own-brand cider. Our decision to remove the 3L PET bottle was taken after discussions with alcohol charity Addaction who identified a potential link with harmful and hazardous consumption patterns.</p> <p>We have also widened our range of lower alcohol and alcohol-free alternatives and have included lower alcohol alternatives is alcohol product promotions. We have begun to stock smaller wine bottles and where alcohol is sold in one of our stores we make available at least one alcohol-free product to provide customers with a genuine choice. We have also committed to include lower alcohol alternatives wherever promotions of alcoholic products takes place in our stores.</p>

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Diageo Great Britain Limited

Our innovation pipeline continues to develop and launch lower alcohol wine and wine based drinks to increase choice for our consumers. We have reduced the strength of our Blossom Hill white wine, "Californian White" by 0.5% (currently the UK's biggest selling white wine) from 12% to 11.5% ABV. This change to 11.5% ABV is planned to be a permanent change. In November 2103, we launched Blossom Hill Sparkling Moscato at 6.5% ABV. Last year we launched Blossom Hill Vie, white and rose variants, which is a 5.5% ABV wine based drink and has already sold over a quarter of a million cases. The livery and occasions of consumption are similar to wine, but offer consumers a great tasting alternative to full strength wine. These wine drinks have less than half of the alcoholic strengths of most standard wine offerings. We are currently in the process of launching Blossom Hill "Sun Kissed" red and white wines, both lower in alcohol at 10.5% and 10% ABV respectively.

Our lower strength variant of Guinness; Guinness Mid-Strength at 2.8% has continued to grow.. Volume sales increased by 39.2% compared to last year due to a combination of factors including new distribution within Waitrose.

Heineken UK

HEINEKEN UK has exceeded our target to remove 100m units from the market. To the end of March 2014 we have removed 155.7 million units from the market. This has been achieved by -

In June 2012, we reduced the ABV of bottled and canned Strongbow from 5.3% to 5%.

In February 2013, we reduced the ABV of John Smith's from 3.8% to 3.6%.

In March 2013, we launched Foster's Radler 2% ABV.

In 2012 and 2013 we launched a range of Strongbow and Bulmers variants at lower ABVs than the category average.

We are continuing to expand choice across our portfolio in 2014, so that drinkers are better able to access the right drink for the right occasion without sacrificing taste or refreshment. In March 2014 we launched two new 2.8% Bulmers variants, a new Radler Lime & Ginger 2% variant and a new zero alcohol Radler. We will report on progress on these in 2015.

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Marks & Spencer	<p>As a responsible retailer of alcohol, M&S continually looks to provide our customers with attractive ways to reduce their alcohol consumption should they wish to do so. Examples of what we are doing to provide a greater choice of quality lower alcohol alternatives include:</p> <ul style="list-style-type: none"> - As part of our popular Dine in for £10 meal deal we continue to offer non-alcoholic alternatives to a bottle of wine, such as twin packs of fruit presses and sparkling juices. In addition we will give our Dine in for £10 customers the opportunity to replace their 75cl bottle of wine with a premium 50cl bottle allowing them to try a higher quality wine in a smaller bottle size. - We are expanding the range, variety and distribution across our stores of wines we offer in 25cl and 50cl bottles, giving customers the chance to purchase their favourite wine in smaller portion sizes. - We are introducing a wider range of lower alcohol wines including a dozen new lines of the very best tasting wines on the market. We have also been working with wineries around the world to develop new wine making techniques to ensure quality is in no way compromised.
Marston's PLC	<p>We have introduced Fosters Radler into our managed pubs, at 2% ABV this offers a reduced alcohol alternative to drinkers. We have also increased our range of adults of drinks to provide greater non-alcoholic choice to our customers.</p> <p>Promotion of our NABLAB's (no alcohol beer / low alcohol beer) still remains part of our off trade strategy. We remain committed to securing EDLP promotions on lower ABV beers (under 3%). Marston's pale ale and Manns brown ale continue to grow in volume and distribution and are well supported at fixture. Our plan to reduce Ringwood Boondoggle down to 4.2% and Old Thumper down to 5.1% (from 5.6%) has been undertaken and we remain committed to holding average ABV's on our mixpacks at 4.3% or lower.</p>
McMullen & Sons Ltd	<p>We have increased the number of initiatives that we run to promote soft drinks from 2 per year to 4 per year, which we believe heightens customers' awareness of these products in the pub environment.</p> <p>As part of our Special Reserve range of seasonal / specialty cask ales we produced one bitter at 3.5% to demonstrate that customers can still enjoy the craft and character of a bitter beer at lower alcohol levels.</p>

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Molson Coors Brewing Compa- ny (UK) Ltd

Molson Coors recognises that respect for alcohol is essential to its proper, responsible enjoyment. We are committed to developing lower ABV beers, which meet a growing consumer desire for lighter products that fit with changing lifestyles and tastes.

Molson Coors continued to expand the Carling Zest (2.8%) range in 2013. In addition to the permanent return of the citrus varietal, two seasonal varietals, ginger and winter berries, were also launched. In 2013 Carling Zest won the Grocer's prestigious "Alcoholic Drinks Brand of the Year" Gold Award.

In 2013, Molson Coors launched Carling Fruit Coolers (2%) into the lighter category. Coolers have been designed to meet growing consumer demand for lighter products. Carling Fruit Coolers are available in lemon and grapefruit flavours.

Morrisons Super- markets Plc

We remain committed to helping customers who wish to reduce their alcohol intake. For example, in 2013/14 we introduced a low alcohol lager (0.5% ABV). This sits alongside a range of own brand lower alcohol products:

- own brand low alcohol cider (1% ABV)
- own brand beer (2% ABV)
- own brand lager (2% ABV)

We also have a good range of branded low and non-alcohol wines and ran promotions on relevant products as part of our support for the "Love Your Liver" campaign.

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<p>Nisa</p>	<p>As Nisa has no owned stores, the influence that it has over alcohol sales can only come from range, consumer advertising and working relationships with committed manufacturing partners, Molson Coors, AB Inbev and Brand Phoenix, who collectively have pledged to remove 544 million units by 2015.</p> <p>While Nisa is heavily reliant on its working relationships with its suppliers to enact changes around alcohol unit reduction, since signing up to the alcohol reduction pledge Nisa has:</p> <p>Reduced the volume of super strength lager sold by 55%, and it no longer provides any margin enhancing pricing on these products. Nisa had already taken steps to work in tandem with the ideals of responsible alcohol retailing, namely through the decision not to produce any consumer advertising point of sale for white cider or super strength beer.</p> <p>Worked with key supply partners to grow the emerging “Moderation” category.</p> <p>Increased consumer facing feature of products that contain 2.8% ABV or less thus driving distribution of this category into over 1,900 member outlets in the past 26 weeks.</p>
<p>Pernod Ricard UK</p>	<p>In 2013, PR-UK launched two new product lines of wines, the Jacob’s Creek Cool Harvest range and the Brancott Estate’s Flight selection of wines. Both brands have a lighter alcohol content that distinguishes these wines from other wines from the same region. Our sales of these wine ranges got off to a modest start in 2013. PR-UK estimates that with the introduction of these wines, 1.9 million units have been removed in 2013.</p> <p>PR-UK is optimistic that the sales for these new wines will grow over the course of the 2014 summer months.</p>
<p>PLB Group Ltd</p>	<p>PLB continues to work with suppliers to produce a greater range of lower alcohol wines to add to the company portfolio. Where possible these lower alcohol products will also be bottled in smaller bottle sizes.</p> <p>In 2014 PLB hopes to launch more low alcohol products into the market. This work is ongoing and will most likely be announced on PLB’s website once the products have been confirmed.</p>

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Sainsbury's Supermarket Ltd

We continue to work towards our 2020 target of doubling the sales of lighter alcohol wine and reducing the average alcohol content of own brand wine and beer and cider. As there is no legal definition of lighter alcohol wine, we are seeking to double the sales of our wines under 10.5% ABV.

We offer a number of wines which are under 10.5%, including this year launching a Winemakers'™ Selection by Sainsbury's™ Californian White Zinfandel (75cl and 2.25l bag in box) and a single serve bottle of Taste the Difference Fairtrade Moscato.

To support this commitment, our winemakers and product technologists are working with our suppliers to identify methods and technologies through which we could reduce the alcohol content of our existing wines as well as looking for new wines which have lower ABVs. The key with all this work is to ensure that product quality is not compromised as alcohol content is reduced.

One example is our basics range of red, white and rosé

wines, where we have been able to reduce the ABV from 11% to 10.5% ABV through blending, without affecting the taste. In addition we are working with the University of Adelaide on a three-year research and development programme to explore new technologies and techniques to reduce alcohol while maintaining quality that could be developed for future commercial use. We are also working with some of our suppliers on small scale projects in their vineyards.

We continue to introduce smaller sizes of some of our most popular products, to help customers who may want to consume one glass of wine at a time, which also helps them control the number of units they are consuming. Examples launched over the last year include Taste the Difference Primitivo, 18.7cl, Winemakers Selection Californian White Zinfandel, 18.7cl, Winemakers Selection Gavi, 18.7cl, Taste the Difference Pinot Grigio Trentino, 37.5cl, Taste the Difference Barrnhuelo Rioja Blanco, 18.7cl, and Taste the Difference Barrnhuelo Rioja Crianza, 18.7cl.

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<p>SPAR (UK) Ltd</p>	<p>SPAR UK has continued to work towards the national 1 billion unit reduction target with the following ongoing actions over the last year:</p> <p>SPAR has delisted SPAR White Cider, saving 3,600,000 units annually.</p> <p>Further savings have come from the reduction of abv in SPAR Lager and Cider totalling 988,800 units saved in 2013/14.</p> <p>Two bottled cider products have reduced in size which has saved over 156,600 units in 2013/14.</p> <p>SPAR has also agreed a low alcohol promotional plan throughout the year as well as planning to promote low alcohol wine.</p> <p>Low/No alcohol beer sales are up by 834% in SPAR in 2013/14 and will continue to be a key focus in 2014/15.</p> <p>Superstrength lager sales are down by 21% in SPAR in 2013/14 as SPAR continues to exclude these brands from national promotional feature.</p> <p>Low alcohol wine sales are up by 59% in 2013/14 and continue to be a key focus on 2014/15.</p>
<p>T&R Theakston Ltd</p>	<p>Theakstons produce and sell a range of beers some of which are lower strength at one at 3.5% through the on-trade. The company has also extended its trial of providing third of a pint measures in its outlet as this has proved very popular with customers.</p>
<p>Tesco PLC</p>	<p>Tesco is the leading retailer of low alcohol products in the UK. We now have 24 lighter wine styles with an ABV below 5.5%. We also work with our branded suppliers to ensure that we give space to new, lower alcohol lines which they develop.</p>

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The SHS Group Drinks Division (formerly Beverage Brands)

We have made a number of changes in this area over the last few years, including the move of our WKD brand from 5.3 percent ABV down to 4 percent (now just 1.1 units per two seven five ml bottle).

We have also worked closely with retail partners to develop no alcohol alternatives, increasing consumer choice and siting these within the Beers Wine & Spirits fixtures of stores to encourage consumers to try something different. As no alcohol, lower calories options, these are very popular with consumers looking to reduce their total alcohol and calorie intake, with positive responses from those on Weightwatchers and Slimming World plans (particularly for Sorelle, our no alcohol wine brand).

In addition, we often include our own soft drinks brands alongside alcohol as a clear consumer alternative. Examples include promoting Shloer in pubs and communicating to mums to be, and bottlegreen being offered as part of a supermarket meal deal.

Finally, we have reduced the ABV of our ciders by introducing Merrydown Fox at 6 percent ABV (Merrydown Vintage has historically been at 7.5 ABV as a premium heritage cider), and launching a blackcurrant variant at 4 percent ABV. These are available in 500 ml bottles (previous bottles being 700 and 500 ml).

Waitrose

Waitrose continues to support the overall principle of the unit reduction pledge. Below is a summary of product developments for 2013.

Sales of de-alcoholised wines increased by 15% in value and 9% in volume.

Sales of single serve 18.7cl still wines and 20cl sparkling increased by 17% in value and 13% in volume.

We have further developed our range of low alcohol wines. This includes adding Torres Natureo 0.5% alcohol rosé and red wines to our assortment.

Our Waitrose Low Alcohol Cider was re-launched with a new label and has been popular with customers. Unit sales increased by 30% in 2013 versus sales in 2012.

As we stopped selling Waitrose Reserve Cider from September 2012, we removed a further 229,600 units in 2013. All our own label premium ciders are now below 8% abv.

We continue not to sell spirits traditionally associated with pre-loading in our convenience branches. This led to a further 65,625 units being removed in 2013.

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