

Informing alcohol consumers

2021 UK Market Review



CONTENTS

2 Executive Summary

4 Foreword

5 Labelling in the UK

9 Survey Results

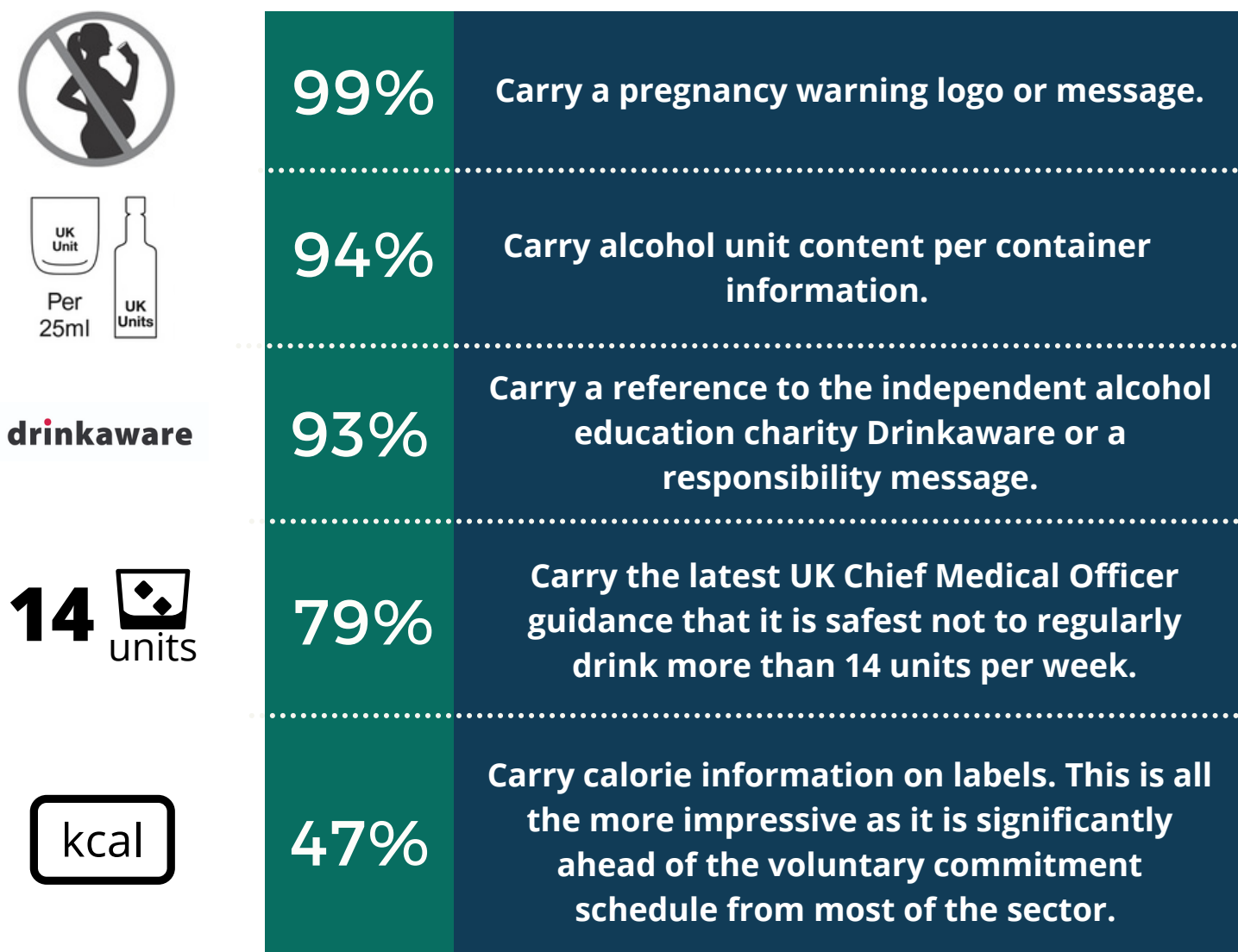
- Methodology
- UK Chief Medical Officer Guidance
- Portman Group Best Practice:
 - Pregnancy labelling, unit information and Drinkaware
 - Calorie labelling
 - Additional voluntary best practice

20 Next Steps

EXECUTIVE SUMMARY

For over 25 years, the UK alcohol industry has proactively worked to ensure that alcohol labelling is both socially responsible and informative for consumers. Through the Portman Group best practice and innovative initiatives such as the Portman Group Commitments to Action and the Public Health Responsibility Deal, consumers have access to more product and health information than ever before.

A review of the labels of 400 alcohol products on the UK market, including the best-selling brands available across all major retailers, conducted by the Portman Group has found:



EXECUTIVE SUMMARY

Next Steps

As we have for the last 25 years, the Portman Group is committed to remain accessible to producers as a source of free and confidential advice on ensuring that labels remain within the rules of the Code of Practice as well as further best practice guidelines.

- We plan to work proactively in partnership with alcohol producers to help close the few remaining gaps where they exist.
- We will also work across the sector to launch updated best practice guidelines, ensuring that UK consumers have access to more health and product information than ever before to help them make an informed choice.
- We also intend to carry out another review of the market in 2022, to track further progress that has been made in updating labels.



FOREWORD

Our latest research re-emphasises the ongoing serious commitment of the alcohol industry to the highest standards of voluntary best practice, whilst ensuring that consumers are able to make an informed choice about their alcohol consumption.

The results also highlight that when the Portman Group speaks, the industry responds positively, with our minimum recommendations such as unit labelling and warnings concerning alcohol and pregnancy, applied near universally across labelling on the UK market.



Matt Lambert
Chief Executive, Portman Group

I am also encouraged to see the significant progress that has been made in updating labelling to include the latest UK Chief Medical Officer's guidance on low-risk drinking. Whilst we recognise that change takes time to filter through, our results show that we are on course for the vast majority of alcohol sold in the UK to carry such guidance and we are committed to working constructively with producers to help close gaps where they exist.

With much of the Government's recent focus on obesity rates and helping consumers make healthier choices, our results show that voluntary efforts concerning calorie labelling are bearing fruit. Close to half of the UK market already carry calorie labelling, including many of the biggest alcohol brands.

All this has been achieved without any recourse to legislation and at no cost to the UK taxpayer, highlighting the ongoing success of voluntary partnerships with industry to achieve our shared objective of informing consumers and tackling alcohol misuse.

LABELLING IN THE UK

The alcohol sector is committed to providing customers with information they need to make informed choices. This involves labelling, the provision of information on websites, and through consumer channels, campaigns, sponsorships and advertising. Alcohol labelling is just one tool to impart information and often must do this within a small space on pack.

In the UK, the alcohol industry has voluntarily ensured that it provides information to the customer. It is a longstanding commitment that has not required government resource and has resulted in widely accepted guidance that provides further information to help facilitate the responsible consumption of alcohol.



Code of Practice

This year, the Portman Group celebrates 25 years of the [Code of Practice on the Naming, Packaging and Promotion of Alcoholic Drinks](#). The Code seeks to ensure that alcohol is promoted in a socially responsible way, only to those aged 18 and over, and in a way that does not appeal particularly to those who are vulnerable. This has been done in an effective, responsive, and inexpensive way:

- **Effectively** – over 170 products have been amended or removed from the market. Many thousands more have been helped to adhere to the Code before appearing on shelves through the support of the Advisory Service.
- **Responsively** – there have been five updates to the Code over 25 years responding to changes in public attitudes and expanding its reach; all without recourse to Government or Parliamentary time.
- **Inexpensively** – the 14 leading members of the industry are currently funding the model for all to be protected at no cost to the public purse.

The Code, now in its sixth edition, has continued to evolve in step with society over the last 25 years, with the latest edition in 2019 containing new rules to prevent marketing considered to cause serious or widespread offence, as well as a tightening of the rules surrounding links to illegal behaviour and suggestions of mind-altering qualities.

Commitments to Action 2003

As part of its commitment to agenda-setting responsibility, the Portman Group launched its 'Commitments to Action' in 2003. Member companies ensured that alcoholic unit labelling and a reference to Drinkaware were placed on their products.

Public Health Responsibility Deal

The Commitments to Action subsequently formed the basis of the development of the Government's Public Health Responsibility Deal in 2011. This included a wider industry commitment to place a pregnancy warning on labelling.

Industry Best Practice Guidance

The Commitments to Action along with the pregnancy warning from the Public Health Responsibility Deal led the industry to come together to create industry **Best Practice Guidance**. The Portman Group worked with the British Beer and Pub Association, the National Association of Cider Makers, the Scotch Whisky Association and the Wine and Spirits Trade Association to create guidance that recommends that producers incorporate at a minimum: unit alcohol content per container, a pregnancy logo or message, and active signposting to [Drinkaware.co.uk](https://www.drinkaware.co.uk).

LABELLING IN THE UK

Supported through the work of the Portman Group's free Advisory Service, independent research shows that this has helped move the sector forward in conveying alcohol health-related messaging. When analysing the prevalence of the pregnancy logo by 2014 [1], over 90% of products carried the pregnancy warning and by 2019 this had reached 97% [2]. Today we are pleased to announce that it has reached nearly 99% (98.75%).

In addition, the Portman Group recommends that all producers incorporate the 2016 Chief Medical Officer low-risk alcohol consumption guidelines. There are clear instructions on how to do this available in the guidance and we are proactively working with the industry to promote its inclusion.

The Portman Group guidance also includes best practice examples on how producers can incorporate further voluntary elements such as a drink-driving logo, responsibility statement and an age-restricted product logo.

Furthermore, the Portman Group guidance provides advice on how producers can incorporate calorie information on packaging, which was until recently an issue of European regulatory concern with Britain formerly a member of the European Union and single market. It is impressive to see that the industry is already taking voluntary steps without the need for regulation to ensure that calorie information is made available to consumers.

In 2019, both the brewery and spirits European trade bodies signed agreements with the European Commission to incorporate calorie information by 2022 [3]. The Brewers of Europe has committed to label calories on all beer bottles and cans in the EU by 2022 [4], whilst SpiritsEUROPE has committed to calories on labels, covering 66% of the EU market by December 2022. The [European cider association AICV](#), has also committed to have calories on pack for 80% of the market by June 2024 [5]. These commitments remain relevant as many producers seek to minimise the number of changes between labels for the UK and Europe and will often replicate the EU market requirement with our own.

LABELLING IN THE UK

Furthermore, in September 2021, the European wine association Comite European des Entreprises Vinse and SpiritsEUROPE launched a pilot of a new 'e-label' scheme to be rolled out across Europe which will provide a 'one-stop' online platform for users to access information in the 24 EU languages on ingredients and other health information accessed via a QR code on labels [6]. The UK counterparts to European trade bodies are working to ensure that these European voluntary commitments and digital innovations also cover the British market. This has the benefit of ensuring that more information can be added beyond that which can be captured on the pack. It can complement and possibly enhance the experience for consumers who are interested in learning more.





SURVEY RESULTS

Methodology

UK Chief Medical Officer Guidance

Portman Group Best Practice:

- Pregnancy labelling, unit information and Drinkaware
- Calorie labelling
- Additional voluntary best practice

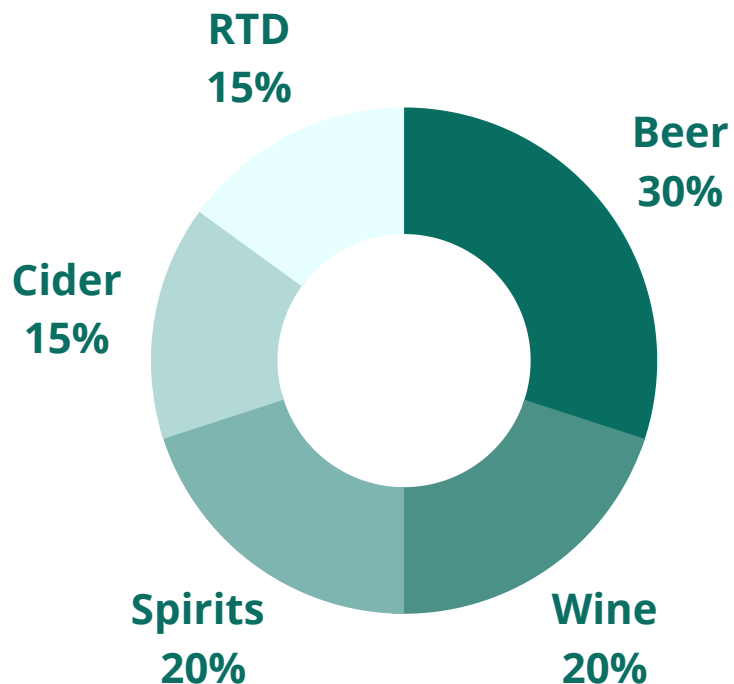
METHODOLOGY

Between July and August 2021, the Portman Group sampled 400 alcohol products on the UK market, photographing the front and back of the labelling for analysis. The 400 products encompass the best-selling alcohol brands on the UK market, across all alcohol categories, as identified by the market research firm Nielsen, as well as other products readily available in the retailers visited.

The sample was designed to reflect the UK market, with a greater weighting given to sampling beer products as the largest UK alcohol category. Beer had 120 products sampled, followed by 80 products sampled for the wine and spirits categories, and 60 products sampled respectively for the cider and ready-to-drink (RTD) categories, which encompasses pre-mixed spirits and hard seltzers.

The 400 products consist of the top UK brands available to consumers across all major UK supermarkets, representing the majority of alcohol by volume sold in the UK. The sample encompasses the diverse range of brands and products manufactured by the sector including major international producers, smaller UK family brewers, craft brewers and distillers and supermarket own brand products.

Market Review Sample Overview



METHODOLOGY

Given the ongoing COVID-19 pandemic, sampling was limited to a variety of large and medium supermarkets, smaller stores and off-licenses across the boroughs of Lewisham and Bromley in South London. The aim of this was to provide a broad range of outlets from which consumers would buy alcohol.

Retailers analysed:



amazon

ASDA



Costcutter

Iceland



Londis

MARKS &
SPENCER

Sainsbury's

savers

TESCO

WAITROSE
& PARTNERS

+ Four local
off licenses

The figures cited in the report reflect a snapshot of the UK market based on the labelling identified during the survey time. Where there was outdated stock some of the labels will not have captured more recent changes in labels that newer products would display.

UK CHIEF MEDICAL OFFICER GUIDANCE

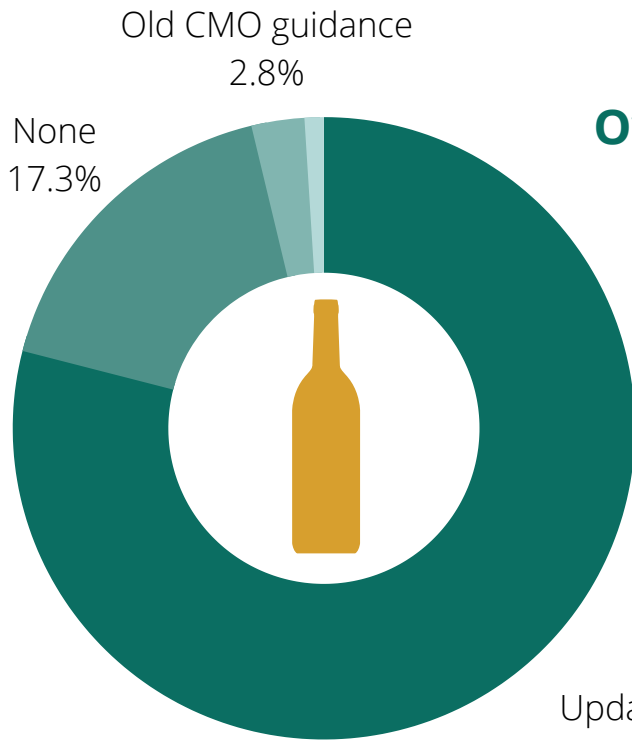
Our review of 400 products on the UK market found that a large majority (79%) carried the 2016 UK Chief Medical Officer guidance that it is safest not to regularly drink more than 14 units per week. This represents a large increase from a 2019 survey conducted by the UK Alcohol Health Alliance, which surveyed a similar number of products and said that only 29% of products surveyed in 2019 carried the up-to-date guidance [7].

The UK Chief Medical Officers recommend adults do not regularly drink more than 14 units per week.

A small minority (17.25%) of products surveyed carried no specific health guidance on pack, with many directing consumers to information online, and 2.75% carried the old UK daily intake guidance. 1% of products surveyed from one producer carried guidance from the Irish Department of Health, which was cited as recommending no more than 17 units per week for men and 11 units for women.

Portman Group members committed in 2019 to ensuring the latest Chief Medical Officer guidelines are provided on updated editions of labels, and the effect is showing through in these results. The Portman Group encourages all producers to incorporate the 2016 Chief Medical Officer guidelines on labelling. Now we are returning to normal market conditions as the restrictions from the COVID-19 pandemic have lifted and measures to ensure UK marketed products adhere to changes as a result of Brexit have been implemented, we can expect a further increase to these figures as slow-moving outdated stock is replaced on the market with updated packaging.

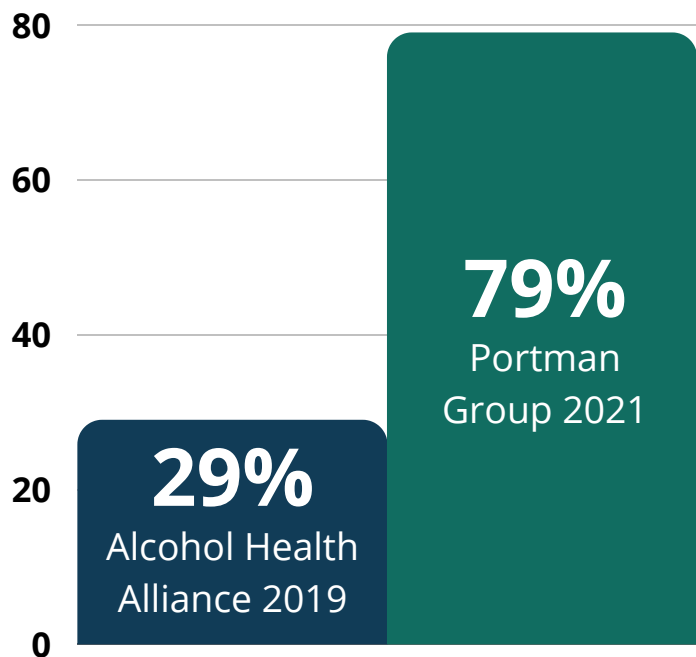
UK CHIEF MEDICAL OFFICER GUIDANCE



Overview of Chief Medical Officer Guidance on the UK Market

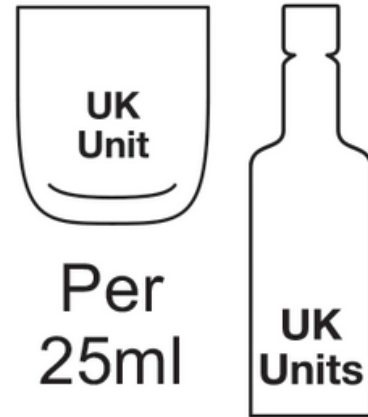
Updated UK CMO Guidance
79%

Large increase of the updated guidance appearing on packaging over the last two years



PREGNANCY LABELLING, UNIT INFORMATION AND DRINKAWARE

drinkaware



The Portman Group, working with the trade bodies in the sector, developed best practice guidance for drinks producers on communicating alcohol and health information to consumers which contained three minimum elements: a pregnancy warning, unit alcohol content per container (and optional per typical serve) and active signposting to [Drinkaware.co.uk](https://www.drinkaware.co.uk). The results of the market review show that this best practice is near universally applied across the UK market.

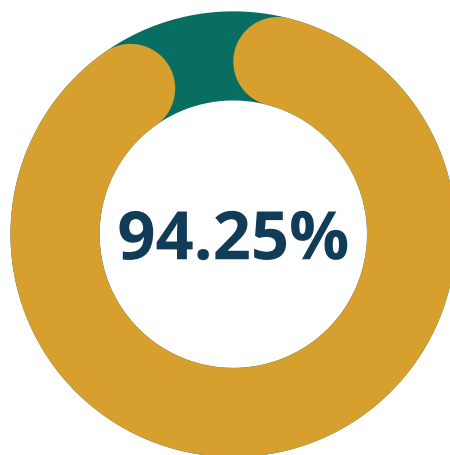
Especially encouraging is that a warning, either as a logo or text, advising consumers not to drink alcohol when pregnant is carried on nearly 99% (98.75%) of products on the UK market. It is absent on only a handful of foreign imported brands. This is slightly higher than a 2020 report from the Alcohol Health Alliance, which found 97% of products carried a pregnancy warning [8]. Similarly, 94.25% of products sampled displayed unit alcohol content per container information to consumers, almost identical to that found by the Alcohol Health Alliance (95%).

93% of products sampled carried some form of responsible drinking message and/or link to further information, with signposting to the independent alcohol education charity Drinkaware appearing on 88.25% of products sampled. We recommend that producers include a reference to Drinkaware on labels, but acknowledge the licensee cost implications for some producers.

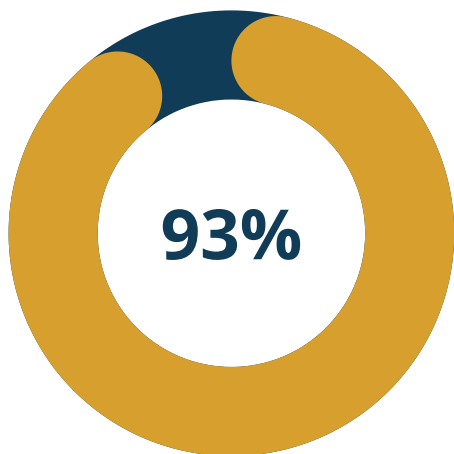
PORTMAN GROUP BEST PRACTICE



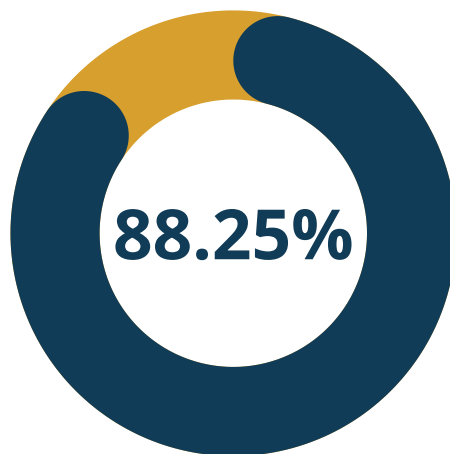
**Pregnancy warning
logo/message**



**Unit alcohol per
container**



**Responsibility message
or Drinkaware**

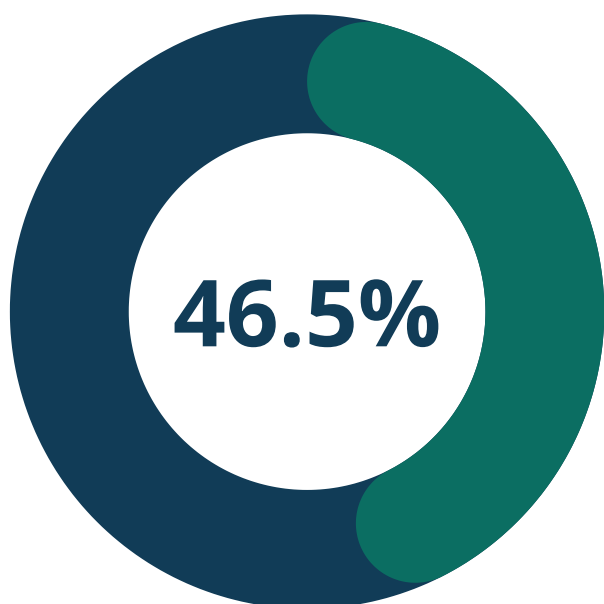


**Active signposting to
Drinkaware.co.uk**

CALORIE LABELLING

Our review found that close to half (46.5%) of products on the UK market already carry calorie content information, most often represented by kilojoules (Kj) / kilocalories (Kcal) per 100ml, in line with existing food labelling regulations. We can also expect this to continue to rise, as updated stock is introduced to the market in line with the previous voluntary agreements with the European Commission agreed by SpiritsEurope and the Brewers of Europe, as well as other cider and wine producers.

Whilst calorie labelling does not currently sit as a minimum requirement under Portman Group best practice guidance, having previously primarily being an issue of European concern under the European Union, the Portman Group's free marketing toolkit does provide producers with advice on how to incorporate calorie information.



**Calorie labelling
appears on close to half
of the UK market**

ADDITIONAL VOLUNTARY BEST PRACTICE

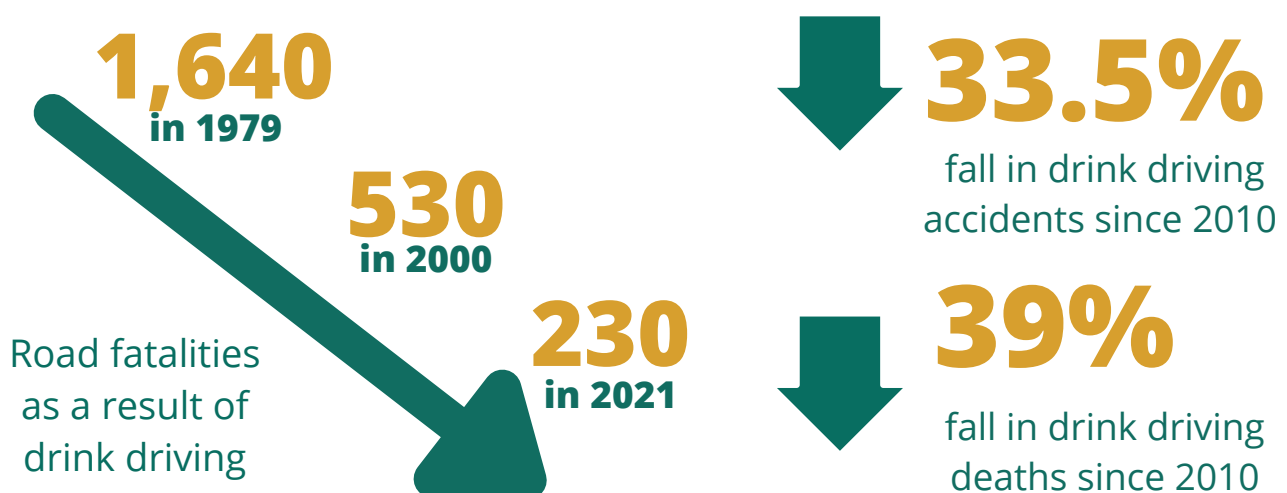
The Portman Group's free marketing toolkit also provides producers with advice on how to incorporate additional examples of voluntary health messaging, with two such examples being a warning against drink driving and an age restriction message or logo warning that the product is only intended to be consumed by those aged 18 and over.

Drink driving

Our research shows that a warning against drink driving appears on 25.75% of products on the UK market. The appearance of this logo complements, wider measures that have had a marked effect on influencing behaviour.

Public information campaigns, coupled with the breathalyser test and the focused efforts of British Transport Police over recent decades have had a palpable effect on drink driving. In 1979, the number of road deaths attributed to alcohol was 1,640. By 2000, it was 530 and it is now 230. Over the past decade drink driving accidents & deaths have fallen by 33.5% and 39% respectively [9].

Drink-drive accidents and casualties lowest since records began in 1979



ADDITIONAL VOLUNTARY BEST PRACTICE

The annual Government drink driving Christmas campaign by THINK! has been highly effective in reducing drink driving rates. This year they are re-launching the [Pint Block campaign](#) to shift attitudes and behaviours among young men towards drink driving with the message that 'A mate doesn't let a mate drink drive'. The industry-funded education charity Drinkaware also runs campaigns such as the '[Home and Dry](#)' initiative, whilst individual companies also fund high-profile public information campaigns warning against the dangers of drinking and driving.



ADDITIONAL VOLUNTARY BEST PRACTICE

Under-18

Our research shows that 15.75% of products voluntarily carry an age restriction warning on labels restating that under UK law it is illegal to sell alcohol to any person under the age of 18.

UNDER 25? 

Please be prepared to show ID when buying age restricted products.

The alcohol sector has sought to ensure that it does not market products in a way that has particular appeal to, or allow the sale of alcohol, to those under-18. There are robust ID schemes in place including the National Proof of Age Standards Scheme (PASS). Local partnership initiatives to divert youth away from alcohol including Community Alcohol Partnerships (CAP), which link local authorities, police and schools. Retailers and neighbourhood groups also prevent alcohol-related harm in young people. The majority (56%) of 11-15 year olds have never had an alcoholic drink – a reversal of the situation 20 years ago when people who had drunk alcohol in this age group were in the majority[10]. Furthermore, in the areas where CAP operated, there were 61% average reductions in weekly drinking among 13–16-year-olds and a 50% reduction in young people asking adults to buy alcohol for them outside shops[11].

The Portman Group, alongside the Advertising Standards Authority, ensures that there is effective industry self-regulation of alcohol marketing which prevents products from having a particular appeal to minors. The Code of Practice set up 25 years ago has always had the principle that alcohol marketing should not particularly appeal to under-18s. The Retail of Alcohol Standards Group promotes the widely used 'Challenge 25' (previously Challenge 21) scheme to verify the age of anyone who appears under the age of 25 in order to prevent any accidental sales to minors.

NEXT STEPS

Our research highlights the ongoing serious commitment of alcohol producers to high standards of industry-wide best practice and the substantial progress that has already been made on further voluntary commitments. All this has been achieved without recourse to legislation and at no cost to the UK taxpayer.

As we have for the last 25 years, the Portman Group is committed to remain accessible to producers as a source of free and confidential advice on ensuring that labels remain within the rules of the Code of Practice as well as further best practice guidelines.

We plan to work proactively in partnership with alcohol producers to help close the few remaining gaps where they exist.

We will also work across the sector to launch newly updated best practice guidelines, ensuring that UK consumers have access to more health and product information than ever before to help them make an informed choice.

We will repeat this review of the market in 2022, to track further progress that has been made in updating labels per existing voluntary commitments on the UK Chief Medical Officer guidance and calorie information.



1. Campden BRI: Audit of compliance of alcoholic beverage labels available from the off-trade with the Public Health Responsibility Deal Labelling Pledge, October 2014
2. AHA: Drinking in the Dark, August 2020
3. Brewers of Europe Memorandum of Understanding with European Commission, September 2019
4. SpiritsEurope Memorandum of Understanding with European Commission, June 2019
5. AICV, July 2021
6. CEEV: Digital labelling, September 2021
7. AHA: Drinking in the Dark, August 2020
8. AHA: Drinking in the Dark, August 2020
9. UK Department for Transport, August 2021
10. NHS Digital, August 2019
11. Portman Group: Community Alcohol Partnerships (CAP) – preventing alcohol harm to young people, July 2021



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Written and designed by the Portman Group.

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