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British pub spirits sales fell 21.6% in late September, NIQ says

Overall drinks sales stayed broadly flat, wine also declined, with cider posting the strongest gains in bars and pubs.

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Drinks sales in Britain were broadly flat in September, but the picture inside pubs and bars was uneven, with spirits and wine falling sharply while cider moved higher, according to NIQ’s latest Daily Drinks Tracker.

The market research firm said its data showed a steady overall month for drink sales, even as consumers remained cautious about spending. The clearest weakness was in spirits. Sales in Britain’s on-trade, which includes pubs, bars and similar hospitality venues, fell 21.6% year over year in the week ended Sept. 26 and were down 17.4% in the week ended Oct. 3, NIQ said.

Wine also lost ground over the same period, though the declines were less severe than for spirits. NIQ reported wine sales were down 9.5% in the week ended Sept. 26 and down 6.9% in the following week.

Cider was the main bright spot in the update. NIQ said cider sales increased, standing out against the broader softness in other alcohol categories, though the figures provided in the release did not give the exact rate of growth in the summary of results.

The data points to a market in which overall demand has not collapsed, but consumers appear to be making more selective choices when they do spend in hospitality settings. That matters across the drinks business because shifts in pub and bar demand can quickly feed through to producers, importers and distributors as they plan orders, pricing and promotions ahead of the year-end trading period. If the current pattern continues, weaker spirits and wine sales in the on-trade could put pressure on volumes and margins, while cider producers may see stronger near-term demand.

NIQ described the broader backdrop as one of cautious consumer spending. That helps explain why the market can appear stable on the surface while important categories move in different directions. A flatter overall result may mask a tougher environment for higher-ticket drinks or products more exposed to discretionary purchases during nights out.

The latest readings cover the final full week of September and the first week of October, making them an early indication of how Britain’s drinks trade entered the fall. For bar operators and suppliers, that period is closely watched because it can shape expectations for the run-up to the Christmas season, when hospitality sales typically become more important.

The drop in spirits sales was notable both for its size and for its persistence across consecutive weeks. A decline of 21.6%, followed by a 17.4% fall, suggests more than a one-week distortion and may indicate consumers are pulling back on categories that often carry a higher average spend. Wine’s back-to-back declines, at 9.5% and 6.9%, point in the same direction, though with less intensity.

Cider’s gains suggest some drinkers may be shifting toward alternatives rather than cutting out on-trade alcohol purchases altogether. Without a full category breakdown, the data does not show how much of the cider increase came at the expense of beer, wine or spirits. But the contrast in direction is clear: cider rose while the two other named categories in the update fell.

The NIQ tracker is closely followed in the British drinks industry because it offers a near-term view of sales patterns in hospitality. For suppliers, such weekly data can influence decisions on stock levels, new orders and discounting. For venue operators, it can provide an early signal of which categories are holding up and which may need support through pricing or promotional changes.

Friday’s update leaves the industry with a mixed message. Britain’s drinks market did not show a broad-based downturn in September, according to NIQ, but neither did it show a strong recovery in spending. Instead, the month ended with stability at the headline level and clear pressure in key categories, especially spirits, as consumers continued to watch their budgets.