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British drinkers buy less alcohol but spend more per bottle or can, trade review finds

Moderation and at-home occasions are driving demand for premium beer, alcohol-free drinks and ready-to-drink cocktails

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British drinkers are buying less alcohol but spending more per bottle or can, a shift that is lifting sales value across beer, wine and spirits even as total volumes come under pressure, according to a trade review published by Wholesale Manager. The analysis,

which drew on data from Circana, NielsenIQ, TWC, Drinkaware, SIBA and company disclosures, portrays a market reshaped by moderation, demand for convenience and a willingness to trade up to more expensive products.

The change is most visible in premium beer, low- and no-alcohol products, ready-to-drink cocktails and smaller spirit formats. Health concerns are playing a central role. The review said 78% of U.K. Gen Z consumers are cutting back on alcohol, while alternating alcoholic and non-alcoholic drinks, often called zebra striping, has become more common. A restructuring of U.K. alcohol duties has also encouraged lower-ABV products, especially beers at 3.5% ABV or below, pushing brewers to expand those ranges.

For the drinks industry, that shift goes beyond a consumer trend. It is altering shelf space, pack formats, price points and product mix across convenience stores, wholesalers and importers. Producers are trying to keep core, high-volume brands in place while adding more premium labels, alcohol-free versions and formats aimed at at-home occasions.

Beer remains one of the clearest examples. Circana data cited in the review show beer in the U.K. convenience channel is worth £1.7bn and is growing 5.1% year over year, outperforming grocery. Within convenience, lager accounts for 83% of total beer growth. At the same time, premium beer has become the main growth engine in the category, according to several suppliers cited in the report.

Heineken UK held a 17.9% value share of total U.K. beer sales in full-year 2025 and added £10.5m in value, up 0.2%, according to NielsenIQ data referenced in the review. Its growth was led by Cruzcampo, whose value sales rose 74% over the previous year to a 2.7% share of the total beer category, and by Murphy’s stout, which is worth £11.7m in the off-trade. In March 2026, the brewer introduced Cruzcampo Sevilla Orange, a 3.3% ABV flavored beer in 4x440ml cans for convenience stores, targeting consumers seeking lighter drinking options.

Asahi UK said premium remains the only price segment in beer and lager that is growing. NielsenIQ data cited in the review show small-pack 440ml cans are up 9%, while premium 440ml cans are up 29%. Premium brands in that format now account for

nearly 74% of convenience-market share. The same data set indicates that no- and low-alcohol beer is outperforming total beverage alcohol, leading suppliers to push zero-alcohol extensions such as Peroni Nastro Azzurro 0.0% and new multipack formats designed for take-home consumption.

The report said drinking at home has become a more deliberate choice as consumers try to control spending while still creating more upscale occasions. Drinkaware research cited in the review found that 73% of U.K. alcohol sales are now for at-home consumption. That is helping premium beer, but it is also fueling growth in ready-to-drink products and seasonal drinks marketed for home hosting.

Global Brands said the ready-to-drink category is up 27% in value and 17% in volume in the off-trade, outpacing other beverage categories. The company pointed to strong growth for Hooch and Soopa Hooch, and to its expansion of canned cocktails such as Margarita and Cosmo variants, as evidence that consumers are looking for convenience as much as variety. Brown-Forman is also introducing Winter Jack for the 2026 holiday selling season, a 700ml heated apple-and-whiskey serve with 15% ABV and a £16 recommended retail price, another example of suppliers leaning into low-effort, at-home occasions.

Craft beer and alcohol-free beer are also gaining ground, especially in convenience. Circana data cited by BrewDog show the company holds a 66% share of the impulse craft beer category, where IPAs account for 70% of sales in convenience stores. Alcohol-free beer in convenience rose 26.7% to £4m in moving annual total sales, the review said. That growth aligns with separate consumer surveys showing 43% of consumers are reducing alcohol intake and nearly 40% of people ages 18 to 25 identify as non-drinkers. Suppliers are responding by arguing for alcohol-free alternatives across every major beer style, not just lager.

The moderation trend is affecting cider as well, though in a different way. Total U.K. cider volumes are down 8% year over year, according to TWC data cited in the review, while mainstream cider fell 4% in volume and 5% in value, according to NielsenIQ. Aston Manor said it is outperforming that market decline, with volume growth of 12%, as consumers split between trading up to premium products and seeking lower-priced

options that still promise quality and flavor. The company said Knights Cider, Crumpton Oaks and Frosty Jack’s are being positioned in what it called a premium-value tier, reflecting a broader divide between mainstream products and more clearly differentiated offerings.

Damm UK reported a similar pattern in lager. The company said 54% of U.K. consumers are actively moderating their alcohol intake and described a move toward “better, not more” consumption at home. According to NielsenIQ figures cited in the review, Damm’s sales value in the Great Britain off-trade rose 17% in 2026, while sales volume increased 23%. The company has expanded both its core and moderation ranges, including Estrella Damm 0.0% and Daura 0.0%, to capture shoppers who still want premium positioning but are reducing alcohol.

Spirits suppliers are adapting not only through premiumization but also through smaller pack sizes. Suntory Global Spirits is introducing 35cl bottles of Jim Beam White, Jim Beam Pineapple and Jim Beam Black Cherry into U.K. convenience and wholesale channels. Nielsen data cited by the company show that 53% of fractional whisky sales, covering 20cl to 50cl packs, take place in convenience stores. With the average U.K. basket now at £22.20, smaller formats give retailers a way to offer more accessible price points without giving up as much shelf space as a 70cl bottle requires. The company said further small-format launches are planned across 2026, with 5cl versions of Jim Beam White and Jim Beam Pineapple scheduled for Q1 2027.

Domestic production and provenance are another part of the market shift. The review said the U.K. now has more than 1,000 vineyards, helping drive demand for English sparkling wine, and more than 426 distilleries, reflecting the rise of local spirits production. In beer, the SIBA Independent Beer Report 2025, cited in the review, found that 56% of drinkers are more likely to choose a beer if it is locally produced, while 77% said it is important for venues to stock beers from small craft breweries. That makes regional identity and origin stories increasingly relevant not only to brewers and pubs but also to wholesalers deciding which brands to back as margins tighten and outlets compete for fewer drinking occasions.