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Stout became British pubs’ fastest-growing beer segment with a 5.4% rise through October 2026

Market Watch data showed core lager fell 3.7%, underscoring pressure on Britain’s older mass-market beer styles

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Stout remained the strongest beer segment in British pubs in the 12 months through October 2026, while mainstream lager and ale continued to lose ground, according to Market Watch data from The Oxford Partnership and Vianet.

The data showed stout’s rate of sale rose 5.4% from a year earlier on a Moving Annual Total basis, a rolling 12-month measure used by the provider. That was the best performance among the beer categories listed in the report. At the other end of the market, core lager, described by the provider as conventional lager, fell 3.7%, and ale declined 3.6%.

Other beer segments stayed in positive territory. World lager, the provider’s term for international lager, increased 4.9%. Premium lager rose 2.4%. Craft beer increased 1.6%, extending a return to growth that had begun in the previous report.

The figures point to a market in which drinkers are still supporting some higher-growth and more distinctive segments, even as older mass-market categories remain under pressure. The pattern also suggests that the pressure on traditional beer styles has not eased, despite some recovery in parts of the pub trade.

The October 2026 reading also showed some shifts from the Moving Annual Total figures published for September 2026. Stout’s annual growth rate slowed to 5.4% from 5.9%, a drop of 0.5 percentage points. Craft improved to 1.6% from 0.7%, an increase of 0.9 percentage points. World lager edged up to 4.9% from 4.8%. Those changes reflect movements in annual growth rates, not month-to-month changes in physical volume.

The report does not provide absolute sales volumes for the beer segments in this breakdown, so the category figures show direction and relative momentum rather than the total size of each market. That distinction matters in a pub sector where some categories can grow in rate of sale even while the broader drinks market faces weaker trading conditions.

Across the wider market, October was a difficult month for draft drinks in pubs and other hospitality venues in the United Kingdom. The Oxford Partnership and Vianet said draft beer and cider volumes fell 2.5% from a year earlier in October 2026, reversing

the return to growth seen in September 2026. Average rate of sale across the market declined 0.4% from October 2025. The companies said unsettled weather and two named storms hurt trading during the month.

Even so, customer traffic indicators were stronger. Average pub occupancy reached 66.2%, up 3.5 percentage points from a year earlier, and average dwell time rose by 12 minutes to 154 minutes. The number of operating venues, however, fell to 99,130 from 99,554 a year earlier.

The regional pattern suggested that rural pubs were hit hardest by weaker trading conditions. Rate of sale fell 2.7% in rural locations, compared with declines of 0.9% in suburban sites, 0.2% in London and 0.1% in city venues. That left urban locations relatively more resilient than pubs outside major population centers.

Spending data in the same report pointed to another shift in pub use. Average spend per head increased 2.8% to £26.80, but food continued to outpace drink. Average food spend rose 4.3% to £32.35, while average drink spend increased only 0.5% to £20.89. The gap added to evidence that many customers are still going out, staying longer and spending more overall, but are directing more of that spending toward meals rather than alcoholic drinks.

Within that environment, the beer category data showed both resilience and strain. Stout remained firmly in growth, though at a slower pace than in the September 2026 rolling period. Craft improved further after returning to growth. International and premium lagers also held up. But core lager and ale stayed in decline, indicating that the parts of the market most tied to long-established drinking habits are still losing momentum as pub visits become more food-led and more selective.