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British pub drinks sales trailed year-earlier levels through mid-November

NielsenIQ said the market shrank in five of six weeks since October, leaving venues reliant on Christmas spending

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Drinks sales at pubs, bars and other managed licensed venues in Britain fell below year-earlier levels through the first half of November, adding pressure on hospitality operators heading into the peak Christmas trading period, according to new data from NielsenIQ’s Daily Drinks Tracker, powered by CGA.

The tracker showed average sales in managed venues for the week ending November 7 were 6.4% lower than in the same period in 2025. Trading improved slightly in the following week, but sales for the week ending November 14 were still down 3.1% from a year earlier.

Those results extended a difficult run for the sector. NIQ said the on-premise drinks market, which covers sales consumed in venues rather than bought in stores, posted negative sales growth in five of the six weeks since the start of October. The figures leave many operators and suppliers relying on stronger consumer spending in late November and December to lift results during one of the most important periods of the year.

Sales were weaker than a year earlier on each of the first 10 days of November, the company said. The sharpest drops came on the first two Saturdays of the month, when revenue fell 10.8% on November 7 and 9.6% on November 14. For a sector that depends heavily on weekend foot traffic, those declines point to soft demand at a time when many businesses would normally expect momentum to build before the holidays.

NIQ said the data suggested consumers were staying cautious with discretionary spending before Christmas. The company also pointed to cold weather in some parts of the country and an international break in England’s Premier League as factors that may have affected trade.

The steepest declines came in spirits, continuing a pattern that NIQ said had been seen in recent weeks. Spirits sales were down 23.5% in the week ending November 7 and 20.9% in the week ending November 14, among the weakest category results recorded so far this year.

Other drinks categories also declined, though not as sharply. Beer sales were down 6.2% in the first week and 2.8% in the second. Cider fell 5.7% and 2.7% over the same periods. Wine sales were down 11.2% and 6.0%, while soft drinks slipped 5.0% and 2.5%.

The broad-based nature of the declines suggests the slowdown was not limited to one type of consumer or occasion. Beer and cider, which were the strongest-performing alcohol categories in the data, still failed to return to growth. Wine and spirits weakened more sharply, while even soft drinks, often seen as more resilient during periods of moderation in alcohol intake, remained in negative territory.

Rachel Weller, NIQ’s commercial lead for the United Kingdom and Ireland, said the figures offered little reassurance for the sector ahead of the holiday season. “Our new Tracker numbers don’t give the On-Premise much cause for confidence ahead of the vital festive season,” Weller said. “Saturday trading and weak spirits sales are two big causes for concern, and it’s clear that millions of consumers are moderating their spending, alcohol intake or both.”

Weller said NIQ’s research still showed consumers value pubs and bars during communal celebrations such as Christmas and New Year, but she said venues would need to give customers a strong reason to go out rather than stay home. She said operators and suppliers would need to offer clear value, product quality and a compelling overall experience if they want to capture more spending in the weeks ahead.

The tracker covers sales at managed licensed premises across Britain and is used by operators, suppliers and investors to follow category and brand performance in the hospitality market. The latest reading adds to signs that the industry is entering the festive period without the usual early-November lift, leaving businesses dependent on a stronger finish to the year after a muted start to the month.