



Euromonitor  
International

# Alcoholic Drinks in the United Kingdom

June 2025

Table of Contents

## EXECUTIVE SUMMARY

Alcoholic drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retail developments

On-trade vs off-trade split

What next for alcoholic drinks?

## MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

## TAXATION AND DUTY LEVIES

## OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

## KEY NEW PRODUCT LAUNCHES

Outlook

## MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2019-2024

## MARKET DATA

Table 2 - Sales of Alcoholic Drinks by Category: Total Volume 2019-2024

Table 3 - Sales of Alcoholic Drinks by Category: Total Value 2019-2024

Table 4 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024

Table 5 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2019-2024

Table 6 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2024

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2024

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2024

Table 9 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024

Table 10 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024

Table 11 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024

Table 12 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029

Table 13 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029

Table 14 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029

Table 15 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

## DISCLAIMER

## SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Demand for non/low alcohol beer sees volume growth resume in 2024  
Heineken holds on to number one spot  
Discounters benefits from challenging economic context

PROSPECTS AND OPPORTUNITIES

Beer sales set to plateau as consumers shift toward healthier alternatives  
Stout poised to provide revitalisation in beer  
Increased investment in technology, sustainability and non alcoholic beer,

CATEGORY BACKGROUND

Lager price band methodology  
Summary 2 - Lager by Price Band 2024

CATEGORY DATA

- Table 16 - Sales of Beer by Category: Total Volume 2019-2024
- Table 17 - Sales of Beer by Category: Total Value 2019-2024
- Table 18 - Sales of Beer by Category: % Total Volume Growth 2019-2024
- Table 19 - Sales of Beer by Category: % Total Value Growth 2019-2024
- Table 20 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024
- Table 21 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024
- Table 22 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 23 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 24 - Sales of Beer by Craft vs Standard 2019-2024
- Table 25 - GBO Company Shares of Beer: % Total Volume 2020-2024
- Table 26 - NBO Company Shares of Beer: % Total Volume 2020-2024
- Table 27 - LBN Brand Shares of Beer: % Total Volume 2021-2024
- Table 28 - Forecast Sales of Beer by Category: Total Volume 2024-2029
- Table 29 - Forecast Sales of Beer by Category: Total Value 2024-2029
- Table 30 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029
- Table 31 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

Cider/Perry in the United Kingdom

KEY DATA FINDINGS

2024 DEVELOPMENTS

Volume sales fall in cider/perry in 2024  
Heineken leads as cider sees diversification with low and no alcohol options  
Balancing value and premiumisation

PROSPECTS AND OPPORTUNITIES

Cider/perry faces uncertain future in the UK  
Non alcoholic cider set to drive category innovation  
More diversification and flavours should attract younger adults such as Gen Z

CATEGORY DATA

- Table 32 - Sales of Cider/Perry: Total Volume 2019-2024
- Table 33 - Sales of Cider/Perry: Total Value 2019-2024
- Table 34 - Sales of Cider/Perry: % Total Volume Growth 2019-2024
- Table 35 - Sales of Cider/Perry: % Total Value Growth 2019-2024
- Table 36 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2019-2024

Table 37 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2019-2024

Table 38 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2019-2024

Table 40 - GBO Company Shares of Cider/Perry: % Total Volume 2020-2024

Table 41 - NBO Company Shares of Cider/Perry: % Total Volume 2020-2024

Table 42 - LBN Brand Shares of Cider/Perry: % Total Volume 2021-2024

Table 43 - Forecast Sales of Cider/Perry: Total Volume 2024-2029

Table 44 - Forecast Sales of Cider/Perry: Total Value 2024-2029

Table 45 - Forecast Sales of Cider/Perry: % Total Volume Growth 2024-2029

Table 46 - Forecast Sales of Cider/Perry: % Total Value Growth 2024-2029

## Rtds in the United Kingdom

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Convenience, premiumisation and healthy indulgence driving demand for RTDs in 2024

Diageo Plc remains leader thanks to strong innovations, with competition rising from small brands

Supermarkets throughout the UK increase shelf space for RTDs

### PROSPECTS AND OPPORTUNITIES

Non alcoholic RTDS set to see further growth

Brands will continue to capitalise on premiumisation trend

Celebrity-backed RTD brands will accelerate category growth in the UK

### CATEGORY DATA

Table 47 - Sales of RTDs by Category: Total Volume 2019-2024

Table 48 - Sales of RTDs by Category: Total Value 2019-2024

Table 49 - Sales of RTDs by Category: % Total Volume Growth 2019-2024

Table 50 - Sales of RTDs by Category: % Total Value Growth 2019-2024

Table 51 - Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024

Table 52 - Sales of RTDs by Off-trade vs On-trade: Value 2019-2024

Table 53 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 54 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024

Table 55 - GBO Company Shares of RTDs: % Total Volume 2020-2024

Table 56 - NBO Company Shares of RTDs: % Total Volume 2020-2024

Table 57 - LBN Brand Shares of RTDs: % Total Volume 2021-2024

Table 58 - Forecast Sales of RTDs by Category: Total Volume 2024-2029

Table 59 - Forecast Sales of RTDs by Category: Total Value 2024-2029

Table 60 - Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029

Table 61 - Forecast Sales of RTDs by Category: % Total Value Growth 2024-2029

## Spirits in the United Kingdom

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Tequila and non alcoholic spirits as 2024's rising stars

Promotions and marketing boost growth amid cost-of-living pressures

On-trade sales hold strong in spirits

### PROSPECTS AND OPPORTUNITIES

Non alcoholic spirits to see forecast growth backed by celebrity endorsement

Flavour innovation shifting from gin to vodka

Lower strength innovation on the horizon

## CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 3 - Benchmark Brands 2024

## CATEGORY DATA

Table 62 - Sales of Spirits by Category: Total Volume 2019-2024

Table 63 - Sales of Spirits by Category: Total Value 2019-2024

Table 64 - Sales of Spirits by Category: % Total Volume Growth 2019-2024

Table 65 - Sales of Spirits by Category: % Total Value Growth 2019-2024

Table 66 - Sales of Spirits by Off-trade vs On-trade: Volume 2019-2024

Table 67 - Sales of Spirits by Off-trade vs On-trade: Value 2019-2024

Table 68 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 69 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024

Table 70 - Sales of Dark Rum by Price Platform: % Total Volume 2019-2024

Table 71 - Sales of White Rum by Price Platform: % Total Volume 2019-2024

Table 72 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2019-2024

Table 73 - Sales of English Gin by Price Platform: % Total Volume 2019-2024

Table 74 - Sales of Vodka by Price Platform: % Total Volume 2019-2024

Table 75 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2019-2024

Table 76 - GBO Company Shares of Spirits: % Total Volume 2020-2024

Table 77 - NBO Company Shares of Spirits: % Total Volume 2020-2024

Table 78 - LBN Brand Shares of Spirits: % Total Volume 2021-2024

Table 79 - Forecast Sales of Spirits by Category: Total Volume 2024-2029

Table 80 - Forecast Sales of Spirits by Category: Total Value 2024-2029

Table 81 - Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029

Table 82 - Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

## Wine in the United Kingdom

## KEY DATA FINDINGS

### 2024 DEVELOPMENTS

A year of transition for wine in the UK

Value-driven innovations take centre stage

Promotions maintain dynamism within wine

### PROSPECTS AND OPPORTUNITIES

Climate-driven, value-conscious choices to impact wine's future

Impact of the UK's alcohol duty changes

Rebranding wine for the next generation

## CATEGORY DATA

Table 83 - Sales of Wine by Category: Total Volume 2019-2024

Table 84 - Sales of Wine by Category: Total Value 2019-2024

Table 85 - Sales of Wine by Category: % Total Volume Growth 2019-2024

Table 86 - Sales of Wine by Category: % Total Value Growth 2019-2024

Table 87 - Sales of Wine by Off-trade vs On-trade: Volume 2019-2024

Table 88 - Sales of Wine by Off-trade vs On-trade: Value 2019-2024

Table 89 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 90 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024

Table 91 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2019-2024

Table 92 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2019-2024

Table 93 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2019-2024

Table 94 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2019-2024

Table 95 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 96 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 97 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2021-2024

Table 98 - GBO Company Shares of Champagne: % Total Volume 2020-2024

Table 99 - NBO Company Shares of Champagne: % Total Volume 2020-2024

Table 100 - LBN Brand Shares of Champagne: % Total Volume 2021-2024

Table 101 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 102 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 103 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2021-2024

Table 104 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 105 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 106 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2021-2024

Table 107 - GBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 108 - NBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 109 - LBN Brand Shares of Non-grape Wine: % Total Volume 2021-2024

Table 110 - Forecast Sales of Wine by Category: Total Volume 2024-2029

Table 111 - Forecast Sales of Wine by Category: Total Value 2024-2029

Table 112 - Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029

Table 113 - Forecast Sales of Wine by Category: % Total Value Growth 2024-2029

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/alcoholic-drinks-in-the-united-kingdom/report](https://www.euromonitor.com/alcoholic-drinks-in-the-united-kingdom/report).