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The Grocer Guide to...

**The
Grocer**

Alcoholic Drinks incl Low & No



Analysis



A sense of occasion

Mindfulness, innovation and meeting the need for experiences are all characteristics of the modern alcoholic drinks category

 Ready to drink, convenient and ‘better for you’ are all pushing the boundaries of innovation in the alcoholic drinks category as suppliers continue to woo Gen Z in both the on-trade and beyond. And while a record-breaking heatwave in the UK has contributed to performance this summer, suppliers are focused on a broader outlook to meet consumers evolving needs, with a focus on inspirational flavours that transcend seasonal highs.

Certain categories, such as alcoholic ready-to-drinks (ARTDs) are continuing to win favour with the younger generation, given their convenience and portability, not to mention strong branding. But, in an environment focused on wellness and moderation, the spirits category continues to struggle despite optimism for some sub-sectors.

RTDs continue to shine

Elaine Maher, associate director, alcohol ready-to-drink at CCEP GB, sums it up when she says ARTDs are becoming one of the most interesting parts of the alcohol market as they increasingly brings the cocktail bar and familiar mixed-drink occasion into formats that work for everyday life. “The category is now worth more than £835m in Great Britain¹ and remains the fastest-growing segment within alcohol², with value sales forecast to grow by an average of 4% annually between 2026 and 2028³,” she reveals. “Part of that success is down to how well RTDs respond to changing drinking habits. Consumers increasingly want quality and exciting flavours, but they also value convenience and recognisable brands and serves. The growth of cocktail-style

RTDs is another sign of how consumers are embracing the opportunity to enjoy drinks they might associate with the on-trade in an accessible format at home or on-the-go.”

Despite a challenging backdrop for the wider alcohol category, ARTDs remain one of its most dynamic sectors, agrees Scott Bell, marketing director at SHS Drinks – owner of the WKD and Shandy Shack brands. “Now worth more than £817m annually, the category has grown by 25.5% in value and 14.7% in volume over the past year⁴,” he says. “We expect ARTDs to remain an important growth driver for retailers throughout the rest of 2026 as consumers seek convenient, flavour-led drinks suited to a widening range of social occasions.”

He points to Freshers’ Week, Halloween, Bonfire Night and



Christmas as key occasions for Gen Z consumers to come together for pre-drinks, social gatherings and impromptu parties, creating further opportunities for the ARTD category to drive sales in the next few months.

Flavour in favour for beer and cider

Flavoured beer is another sector which has delivered a more encouraging performance, adds Bell. “Bold and disruptive flavours are injecting fresh energy into the fixture, inspiring consumers to explore new varieties. We expect this momentum to continue, and are forecasting flavoured beer to outperform the wider BWS category throughout the remainder of 2026⁵. Consumers are particularly drawn to fruit-led beers offering sweeter, lighter and more refreshing alternatives to traditional styles.”

In the beer and cider sector as a whole, Heineken believes there is a huge opportunity for retailers at the moment. “The UK beer category sits at £4.3bn⁶ while the cider category is worth £820m⁷,” says Sarah Duncan, category & commercial strategy director at the company. Heineken has worked hard throughout 2026 to help retailers leverage this market opportunity, tapping into increased demand for fruity beers with the launch of Cruzcampo Sevilla Orange and encouraging younger shoppers to explore premium ciders with the introduction of Inch’s Reserve, she says.

At Thatchers, meanwhile, 4th generation cider maker Martin Thatcher says the category has grown this year with the strongest performance coming through the summer. “Over the summer, Thatchers have been

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the fastest growing cider maker⁸, increasing value of the category more than any other,” he says. “We continue to see strong momentum across key selling products including Gold and Haze, with significant growth on Gold. At the same time, our innovations in Juicy Apple, to recruit the next generation of cider drinkers, and Thatchers Zero and Blood Orange o.o are proving key drivers of growth.”

Spirits look to the autumn

The spirits market, meanwhile, remains in the midst of another tough year, with growth still limited, according to LMB UK commercial & marketing director Stephen Watt. “The spirits sector is still in single-digit decline, with the exception of tequila, which is quite a small category in the UK,” he says. “The wins for brands are coming

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mainly through price, as consumers continue to tighten their spending. We are, however, entering the final quarter of the year which is always more buoyant for spirits, particularly darker spirits such as whisky, brandy and rum, driven by seasonal drinking and gifting. So we will see an uplift, mainly for brands in the mainstream and premium categories, rather than super-premium which is increasingly out of reach for many people. However, we don't expect people to splash out on favourite brands as they might have done a few years ago. This year, if a product doesn't fit into the weekly shopping budget, it will be left out of the basket."

Intentional moderation

Moderation and occasion-led drinking is something that Heineken is seeing much more of from younger shoppers, with staying socially connected being the driver of this, notes Duncan. She points to developments in the segment that go further than the classic low- and no-alcohol variants, and cross over into additional functional benefits. "We are looking beyond moderation and catering for those abstaining from alcohol and innovating in a segment that speaks to active consumers who care about ingredients, and don't want to compromise," she says. "Responding to this demand, in April this year we launched Outdoor Brewing, a 0.0 isotonic lager with electrolytes and Vitamin C, in original lager and lemon flavours in the UK. Our aim is to drive category expansion with its emerging lifestyle-led proposition and is our first step into functional brewing, bridging the gap between traditional low- and no- beer and functional soft drinks."

However, while there are lots of exciting innovations going on within this segment, core will always be priority, she adds. "Low- & no-alcohol variants remain key to the category and currently make up 5.2%⁹ of total beer and cider sales."

Low & no has moved well beyond Dry January, increasing by 18.8%¹⁰, says Thatcher. "Consumers increasingly want the freedom to moderate throughout the year, across all kinds of occasions, and that's creating a huge opportunity for cider," he notes. "Thatchers Zero has seen significant growth; continuing to be the UK's No.1 low & no brand in the sector, posting



growth of 47.7%¹¹ ... and is recruiting new consumers to both Thatchers and the cider category."

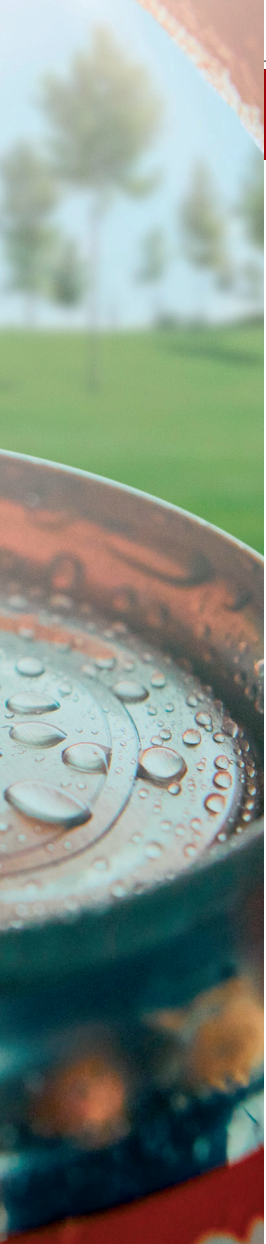
However, "the challenge is now availability," he adds. "As more brands enter low & no, the [retail] fixture needs to evolve with them. Retailers have an opportunity to give the category more space and, importantly, back the products already demonstrating strong consumer demand. Without the right space and range arrangement, there is a risk that low & no's growth potential is constrained, just as shoppers are

looking for more choice."

CCEP's Maher says moderation continues to influence drinking habits, particularly among younger adults, but that doesn't necessarily mean consumers are stepping away from alcohol altogether. "Instead, they're becoming more intentional about what they drink and increasingly embracing a 'less but better' mentality," she notes. "That makes quality increasingly important. If consumers are choosing their drinking occasions more carefully, they have even less reason to compromise when they do choose alcohol. Premium alcohol RTDs can answer that need by offering consistency, recognisable brands and a quality serve in an accessible and convenient format."

"We increasingly see low & no alcohol as part of a broader shift towards choice, moderation and flexibility, rather than simply as a substitute for traditional alcoholic

“Without the right space and arrangement at the fixture, low & no's growth potential is constrained, just as shoppers are looking for more choice”



Summer heat warms up sales

The prolonged spell of warm weather has created ideal conditions for the RTD category, accelerating value growth to 33% and volume growth to 18.8% in the latest 12 weeks aloneⁱ, says SHS Drinks' Bell. "Sunshine naturally encourages more outdoor, spontaneous and social drinking occasions from barbecues and festivals to picnics, pre-drinks and impromptu gatherings driving demand for convenient, flavour-led drinks that can be enjoyed with minimal preparation," he notes.

"Summer is naturally an important period for alcohol RTDs because the

format works so well across spontaneous and outdoor social occasions from picnics and barbecues to festivals, live events like sport and get-togethers with friends," says CCEP's Maher. "The great weather this year has provided even more opportunities for those occasions. But the opportunity isn't simply about being portable. Alcohol RTDs are increasingly becoming part of the experience itself, so we've focused on putting our brands into cultural spaces that matter to consumers.

"A great example is how Absolut Vodka & Sprite partnered with four major Pride

events in Manchester, Leeds, Blackpool and Glasgow, where the product served at bars to create trial opportunities. Activity like this can turn a product trial into something much more memorable."

Cider and sunshine have always been natural partners, so this year's warm weather provided a significant category opportunity, helped by strong performance during the FIFA World Cup, says Thatcher. The cider company increased its marketing investment this year to capitalise, including TV and digital OOH advertising, as well as more sampling

than ever before, he notes, adding: "The opportunity now is to extend the cider season and keep consumers engaged beyond the traditional summer peaks."

Heineken's Duncan says: "We always tend to see an increase in beer and cider sales during the summer period, as people go out for picnics, celebrate special occasions at home with BBQs, or attend events such as festivals. 2026 has been a bumper summer for the category with a 4.2%ⁱⁱ increase in value sales for June and July, driven by incredible sporting events and lots of warm weather."

drinks," says SHS Drinks' Bell. "Consumers are moving more freely between alcoholic, lower-alcohol and alcohol-free options depending on the occasion, but their expectations remain unchanged. Whatever they drink must still deliver on flavour, brand appeal, sociability and enjoyment. That principle is central to the development of our portfolio. The opportunity is not simply to reduce or remove the alcohol, but to create drinks that consumers actively want to choose.

"The introduction of WKD 0.0% broadens the range across different drinking preferences, enabling consumers to moderate their intake while continuing to enjoy the flavours and brands they know," he adds.

Low & no is one of the spirits sector's most interesting categories, and one that all producers are watching closely as its momentum continues, says LMB UK's Watt. "We are seeing the early experiments with 'me too' 0% versions

of classic spirits give way to more interesting and completely new brands and products," he says. "People are making positive choices to explore and buy these as drinks in their own right, which opens up so much opportunity for producers and I expect to see some great innovation and NPD in this space over the next year."

Meeting the right occasion

"Younger adult shoppers are also helping to drive momentum around occasions such as festivals, picnics and live events, where portability is important," says CCEP's Maher. "But convenience alone isn't enough as this generation expects brands to offer flavour, premium cues and cultural relevance too, which is why innovation and experience-led marketing are becoming increasingly important across the category."

"The boundaries between drinking occasions are becoming increasingly

fluid, creating opportunities across a much broader range of seasonal moments," says SHS Drinks' Bell. "Festivals and major sporting events have been complemented by garden gatherings, days at the beach or park, pre-drinks and spontaneous get-togethers. Longer days and warmer weather have encouraged consumers to socialise more frequently and informally, often making purchase decisions at short notice. Rather than approaching every occasion with a fixed drinks category in mind, consumers are increasingly choosing the product that best suits the moment. This places greater emphasis on appealing flavours, convenient formats, strong visibility and chilled availability particularly for spontaneous and on-the-go occasions.

"Shandy Shack is well placed to respond to these changing occasions. Its lower ABV and lower-calorie proposition makes it a natural choice

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after activities such as padel, cycling or running offering a rewarding, sociable drink that feels more aligned with the effort consumers have just made.”

The way consumers drink spirits is always evolving, and this in turn has an impact on the types of products and serves that are in demand notes LMB UK's Watt. “For example, more people are enjoying lunch and a few drinks with friends, rather than dinner, and their drinks choices will reflect that with a preference for lighter and spritz-style serves,” he says. “Brits also continue to love the European Aperitivo moment and its refreshing, longer cocktails. There's definitely a movement towards spirits being part of more casual, fun, social moments rather than the more formal occasions of the past.”

Meanwhile, occasions such as Halloween and the festive period are having a bigger impact on the cider category than perhaps we once thought, says Heineken's Duncan. “Looking at the premium cider segment specifically, we know that sales peak during spring and summer. What is less known is that the category share during winter does remain significant¹², with a value sales spike in December for flavoured cider¹³. This shows a clear willingness from consumers to explore seasonal flavour profiles, and it is something that we want to help retailers tap into with the launch of our new premium winter cider flavour this September, Old Mout Spiced Clementine & Cranberry.”

Flavour and formats

Shoppers are exploring a broader range of strengths and serves, with higher-ABV RTDs helping to bring more cocktail-style and bar-inspired options into the fixture, notes CCEP's Maher. “That's broadening the role the category can play beyond traditional spirit-and-mixer occasions and giving shoppers more choice depending on the occasion,” she says. “Flavour is one of the biggest forces shaping alcohol RTDs, but consumers don't necessarily want complexity for complexity's sake. The sweet spot is something new and exciting anchored in a flavour, brand or serve they already understand.

“Format is increasingly important too, particularly as ARTDs move into a wider range of occasions,” she adds. “While single cans work well for

immediate-consumption occasions, multipacks open up more at-home, sharing and entertaining occasions, giving shoppers a reason to buy into the category beyond an individual serve. Around 67% of RTD shoppers are actively choosing multipacks¹³.”

Experimenting with flavour remains one of the most accessible ways for consumers to navigate the drinks category and find new favourites,” says SHS Drinks' Bell. “Demand is growing for bold, instantly recognisable flavours and unexpected combinations that

“For shoppers in any supermarket, the experience of selecting a premium bottle of spirit is not much different to how they would pick up a tin of beans”

strike the right balance between familiarity and discovery – easy to understand but distinctive enough to spark curiosity. That principle is central to our innovation strategy. Rather than pursuing novelty for its own sake, every new proposition must give consumers a clear and compelling reason to choose the brand, whether through flavour, format, strength or relevance to a particular occasion.”

Innovation and experimentation are among the strongest drivers of RTD growth, particularly from propositions that challenge traditional category conventions, adds Bell. “Consumers are exploring bolder flavours, varied strengths, distinctive formats and cocktail-inspired serves, but still expect the convenience and accessibility that define the category,” he notes.

As for cider, apple cider remains a key growth driver for the category, and innovation is helping broaden its appeal, says Thatcher. He points to the





company's Juicy Apple brand (+28% in summer¹⁴) as "a good example of how a sweeter, lighter style of cider can recruit consumers who may not previously have considered the category". Meanwhile, "for Gold, we've also introduced a pint can, giving shoppers a convenient format to facilitate the perfect pint serve," he reveals. We also see further potential in expanding the pack formats for Zero and are preparing to launch a 10-pack as we unlock more of the low & no opportunity."

As consumers seek more discovery driven, taste led experiences, we're seeing exciting movement in the flavoured and fruit beer segment, says Heineken's Duncan. "The segment, now worth £93m in the UK¹⁵, has been fuelled by the demand for citrus, stone-fruit and botanical taste profiles as shoppers embrace more contemporary taste experiences and greater variety within the category," she notes. "Leveraging this demand, in March

this year we rolled out Cruzcampo Sevilla Orange in a 4x440ml can format ... with the variant generating £2.2m¹⁶ in sales since launch."

A decade ago, spirits drinks often featured more neutral spirits such as vodka, with the taste defined more by the choice of mixer, says LMB UK's Watt. "The gin boom changed this and led the way for more curiosity about flavoured spirits, with the popularity of our pioneering Warner's Rhubarb gin being a good example," he says. "Whisky fans have always been led by flavour, but our popular Speyside single malt Glen Moray has gone a step further with the popular Xperience range, featuring whiskies matured in unusual and flavour-packed casks such as Calvados, Cognac and charred oak. Today, we're seeing the aperitivo craze bringing people into the world of bitter flavours. But people's palates are continually developing."

In-store improvement

"At the moment, for shoppers in any supermarket, the experience of selecting a premium bottle of spirit is not much different to how they would pick up a tin of beans," observes LMB UK's Watt. "I'd like to see some innovation around merchandising and display in the spirits aisle, creating more of a reset in the consumer's mind as they shop and giving them more impetus to linger, browse and explore. If we want consumers to spend a bit more on what will probably be the most expensive item in their trolley, a more specialised and premium environment can only help."

"Make the chiller work harder," says CCEP's Maher. "We know that 'cold is sold' and ARTDs are particularly well suited to chilled and impulse spaces because so many purchases are linked to immediate or spontaneous social occasions. But good merchandising is about more than simply putting cans in a fridge. The fixture needs to make an increasingly diverse category easy to understand. Recognisable brands and serves can act as signposts, with flavours and formats grouped together so shoppers can quickly see both the familiar option and what else there is to discover."

Back the winning brands with proven successes, advises Thatcher. "There is still a significant opportunity within the multiple convenience

and the wider convenience channel, where availability and space do not always reflect what shoppers are buying elsewhere," he says. "The two cider brands with the greatest share of fixture space and the most feature space in 2026 (57.6%)¹⁷ are both in significant decline. Providing the strongest performing cider brands with the right share of fixture, across both alcohol and low & no is one of the simplest ways retailers can unlock category growth."

Undoubtedly, merchandising around an occasion, not just a category is the single biggest driver of incremental change that retailers could make, says SHS Drinks' Bell. "Retailers should look beyond traditional, rigid category blocks and merchandise drinks around the occasions and demand moments that shape shopper decisions," he observes. "Clear, occasion-led signposting and secondary displays focused on seasonal socialising, pre-drinks or moderation can make fixtures easier to navigate, encourage cross-category discovery and help shoppers find the right product more quickly. Chilled availability should also be prioritised."

"We need to think less about merchandising as simply organising products and more about how the store responds to specific demand moments," he adds. SHS Drinks recently completed an extensive usage-affinity project with Kantar examining the increasingly blurred boundaries between alcohol and soft-drink occasions, how those choices change by daypart, and what this should mean for in-store execution. "Using those insights to create clear, occasion-led merchandising solutions would help retailers reflect how people actually shop, while unlocking cross-category discovery and incremental sales," he says.

Sources

¹ Nielsen, Total ARTD, Total coverage, 52 w/e 16.05.26

² NIQ, Total coverage UK, Value sales, 52 w/e 14.06.26 vs YA

³ GlobalData, Segment Insight, February 2026

⁴ Nielsen, Value & volume sales, MAT to 11.07.26

⁵ SHS Drinks: opinion based on current market performance

^{6,7} NIQ, Value sales, full year, 2025

⁸ NIQ, Cider, Value, L12 w/e 08.08.26

⁹ NIQ data, Value share to 01.08.26

¹⁰ NIQ, Cider, Value, 52 w/e 08.08.26

¹¹ NIQ, Cider, Volume, 52 w/e

08.08.26

¹² MSO, Total cider value share, 2025

¹³ Nielsen, Total flavoured cider value sales, Total trade, 2025

¹⁴ OnePulse Survey, 'What Alcohol RTD multipack can sizes do consumers like to purchase?', September 2025

¹⁵ See 8

¹⁶⁻¹⁷ See 6

¹⁸ Internal Thatchers reporting, 52 w/e 31.07.26

Summer heat

¹ Nielsen, Value & volume sales, 12 w/e 11.07.26

¹¹ Nielsen, Value sales, June and July to 01.08.26

Next phase of RTD growth

DETAILS

Coca-Cola Europacific Partners (CCEP)
Pemberton House
Bakers Road
Uxbridge
Middlesex UB8 1EZ
t: 0808 1000 000

KEY CONTACTS

Elaine Maher
Associate Director,
Alcohol Ready-To-Drink

KEY BRANDS

Absolut Vodka & SPRITE
Absolut Vodka & SPRITE Pineapple
Absolut Vodka & SPRITE Watermelon
BACARDÍ & Coca-Cola
BACARDÍ Spiced & Coca-Cola

Consumers no longer want the cocktail occasion to be complex, says Elaine Maher, associate director, alcohol ready-to-drink at CCEP GB – and this shift is reshaping the category.

“Look beyond the individual flavours and serves driving alcohol ready-to-drink (RTD) today, and a bigger change is taking place,” she says. “Consumers increasingly expect the quality and excitement of the cocktail occasion without the complexity that traditionally came with it.”

Alcohol RTD is now worth more than £780m in Great Britain¹, outperforming the wider alcohol market². “The momentum behind cocktails such as the margarita is one expression of that trend, but it is far from the only opportunity,” says Maher.

“For retailers, the next stage of growth is about balancing familiarity with discovery. Recognisable combinations make the category easier to navigate and give shoppers confidence in the serve before they have even tasted it. Innovation then gives them a reason to explore.”

Making discovery feel familiar

That thinking sits behind CCEP’s growing portfolio. Absolut Vodka & Sprite and Bacardí & Coca-Cola both lean on familiar spirit-and-mixer combinations in a RTD format.

“Around those anchors, flavour innovation is broadening the repertoire,” says Maher. Absolut Vodka & Sprite Pineapple joined Original and Watermelon earlier this year, pairing Sprite’s crisp taste with Absolut Vodka and a tropical twist. Bacardí Spiced & Coca-Cola brings something different, matching Bacardí Spiced rum with Coca-Cola.

Format is also being revamped. Absolut Vodka & Sprite now comes in a six-can variety multipack of Original, Watermelon and Pineapple. “With 67% of RTD shoppers opting for multipacks³, it combines flavour discovery with a format suited to sharing,” she says.



“For retailers the next stage of growth is about balancing familiarity with discovery”

Turning engagement into sales

Support beyond launch is crucial. Absolut Vodka & Sprite partnered with Pride events in Manchester, Leeds, Blackpool and Glasgow this summer, while Bacardí Spiced & Coca-Cola’s ‘Bring the Party Home’ activation connected the brand with socialising at home. “These reflect a category becoming embedded in consumers’ social lives,” says Maher. “Convenience remains fundamental, but flavour, quality and cultural relevance matter more and more.”

For the future, the retail opportunity goes beyond stocking more RTDs, to making the category easier and more inspiring to shop. “Strong chilled availability converts spontaneous demand, while merchandising recognisable brand families and their variants together makes navigation simpler,” she says.

“The next phase is about making discovery feel familiar, taking brands and serves consumers already understand and giving them new flavours, formats and occasions to explore.”



Source

- ¹ Nielsen, Total ARTD, Total Coverage, 52 w/e 16.05.26
- ² GlobalData, Segment Insight, February 2026
- ³ OnePulse survey: what alcohol RTD multipack can sizes do consumers like to purchase? September 2025

EVERYTHING BUT THE USUAL

The RTD market has a bright future with projected compound annual growth rate (CAGR) of nearly 4.5% by 2035.¹

The RTD market is worth over £835m & growth outpaces beer, wine & spirit.²

Bacardi Spiced & Coca-Cola has strong consumer demand with 80% purchase intent.³

The Absolut & Sprite brand is growing strongly +58% YoY.⁴

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HEINEKEN UK

e: customerservice@heineken.co.uk

w: heineken.co.uk

Beer and cider for all seasons

DETAILS

HEINEKEN UK
45 Mortimer Street
London
W1W 8HJ
t: 0131 528 1000

KEY CONTACTS

Sarah Duncan
Category and Commercial
Strategy Director

KEY BRANDS

Birra Moretti
Cruzcampo
Foster's
Strongbow
Old Mout
Inch's
Heineken

 In 2026, consumer demand has continued to build across three key areas: fruit-flavoured beer, low & no alcohol options, and seasonal occasions. With the broadest range of beer and ciders in the UK, Heineken UK is proud to offer a strong portfolio of brands.

Offering variety and choice

Heineken UK continues to respond to consumer demand for a range of choices within beer and cider, where core favourites and flavour innovation both matter. In fact, two-thirds of shoppers are open to flavoured beer¹. “This year, we introduced a new variant from Cruzcampo, the UK’s fastest-growing beer brand²: Cruzcampo Sevilla Orange, a credible, lighter option in the flavoured beer segment, currently worth £93m in the grocery channel³,” says Sarah Duncan, category and commercial strategy director at Heineken UK.

“We also strengthened our position in the premium apple cider segment with the launch of Inch’s Reserve, an elevated equivalent to Inch’s Medium Apple, giving consumers a compelling reason to trade up and retailers an opportunity to drive growth,” she adds.

Prioritising low & no

Low & no alcohol variants are currently worth 5.2%⁴ of beer and cider sales in the grocery channel. “Earlier this year, we introduced Heineken o.o Lemon & Elderflower to continue catering to those choosing to moderate,” reveals Duncan. “We’re continuing to focus on innovation in this segment to make sure retailers have good availability of low & no variants, including core lines such as Birra Moretti Zero and Heineken o.o.”

However, it’s not just low & no beer options that matter in-store. Cider products need to be considered too. Consumers can now choose from a credible selection of low & no apple and fruit-flavoured ciders from the company,



“To offer a seasonal proposition at Christmas to cider drinkers, we’re launching Old Mout Spiced Clementine & Cranberry”

including Old Mout Berries & Cherries Alcohol Free and Inch’s o.o, the non-alcoholic counterpart of Inch’s Medium Apple and the first dealcoholised cider in the UK.

Investing in key occasions

Last year, beer and cider grocery sales reached £275m⁵ during Halloween and £150m⁶ at Christmas. These occasions maximise the opportunity for retailers to boost sales as consumers look to stock up for big celebrations, says Duncan.

This year, Strongbow, the UK’s number one flavoured cider at Halloween⁷, continues to amplify the opportunity for Strongbow Dark Fruit with an extension of its ‘Refreshing the Nation’ campaign, helping retailers to maximise cider sales at this time of year.

“To offer a seasonal proposition and new flavour to cider drinkers at Christmas, we’re launching Old Mout Spiced Clementine & Cranberry, a limited-edition flavour that can be served warm or enjoyed over ice,” says Duncan. “By stocking this new flavour, retailers can drive excitement for flavoured cider during the festive season.”

Source

¹ Heineken UK Toluna flavoured beer research, June 2025, n=600

² NielsenIQ, full year 2025

³ NielsenIQ, YTD 2026 to 01.08.26

⁵ NielsenIQ, 18.10.25 to 08.11.25

⁶ NielsenIQ, 12 w/e 03.01.26

⁷ Dark Fruit flavoured cider line extension sales, Total Coverage, 4 w/e 01.11.25



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LMB UK grows spirit sales

DETAILS**LMB UK**
t: 01506 468550
LinkedIn: www.linkedin.com/company/lmbuk/**KEY CONTACTS****Stephen Watt**
UK Commercial and
Marketing Director**KEY BRANDS**Glen Moray Speyside
Single Malt Scotch Whisky
Bardinet Brandy
Warner's Gin
Villa Cardea Limoncello
Sobieski Polish Vodka
Lamb's Rum
Cutty Sark Blended Whisky
Label 5 Blended Whisky

➔ The outlook for the spirits sector remains challenging, but for LMB UK, the UK arm of leading global wine and spirits group La Martiniquaise Bardinet, there is reason for optimism.

Warner's Gin and Lamb's Rum have both recently joined a robust portfolio, which includes Glen Moray Speyside single malt Scotch whisky, Bardinet Brandy and the Villa Cardea range of Italian spirits and liqueurs. This all points to a strategy of offering quality, authenticity and value in every bottle that is proving successful.

For LMB UK commercial and marketing director Stephen Watt, it comes down to the ability to curate the perfect product mix for each grocery partner, meeting consumer demand and maximising revenue opportunities.

"We are laser-focused on our mission to provide customers with the very best products at the very best price, so they can achieve commercial success in the spirits aisle," he says. "Our starting point is always to keep a close eye on the shopper and the trends shaping demand. In the current climate, people want great quality, trusted brands as a treat for themselves or as a gift, but on an ever-tightening budget.

"LMB UK's extensive portfolio has plenty to offer. We also have scale and agility on our side, and a dynamic commercial network that lets us move quickly and supply new products to meet demand."

A good example is Villa Cardea Limoncello, currently second in the UK market and reporting strong growth, up 96.2% in volume and 87.7% in value¹. This exceptional liqueur is crafted in Italy, all natural and made using only Sicilian lemons. When the limoncello spritz trend took off last year, LMB UK



“In the current climate, people want great quality, trusted brands as a treat for themselves or as a gift, but on an ever-tightening budget”

mobilised to fulfil UK grocery orders, letting customers convert surging demand into sales.

Brand investment, and winning consumer attention and loyalty both in and out of outlets, is another key LMB UK pillar across its varied portfolio.

Glen Moray Speyside single malt whisky's Classic expression is currently the UK's third best-selling single malt². It has just confirmed three more years as the official whisky of the ISPS Handa Senior Open, celebrating the shared roots of golf and whisky.

The London Dry expression from Warner's Gin, currently outperforming the category up 21% in volume and 18.3% in value³, inspires drinkers with tales from the farm where it's produced.

French-style brandy Bardinet, matured in warehouses near Bordeaux, is bringing its 'Crafted with French Passion' promise to UK food and drink shows, encouraging consumers to explore brandy and the Bardinet brand.

Watt concludes: "We are investing in our brands to share their stories, engage drinkers and support our customers. We will also keep evolving our product mix. Consumers' tastes change and, at LMB UK, we are alert to 'what's next' and agile in our response, bringing the best mix of products, at the best price, to our customers."



Source

^{1,2,3} Nielsen, GB, 52 w/e
08.08.26

A WORLD OF SPIRITS FOR EVERY OCCASION

CASK EXPLORER
SINCE 1897



*Crafted with
French Passion*



A taste of ITALIAN
LIFESTYLE



From Scotland to France,
Italy and beyond, our range
spans a world of spirits.
Quality, heritage and value
in every bottle.



La Martiniquaise · Bardinet · UK

Sharing our passion since 1934



Broadening shandy's appeal

DETAILS

SHS Drinks
Manderson House
5230 Valiant Court
Delta Way, Brockworth
Gloucester GL3 4FE

KEY CONTACTS

Alex Wilcox
Senior Brand Manager
Chloe Dreher
Assistant Brand Manager

KEY BRANDS

Shandy Shack

Shoppers no longer buy by category, they buy by moment. Consumers move fluidly between beer, ready-to-drink (RTD) products, spritzes, soft drinks and lower-alcohol options depending on the occasion, prizing flavour, refreshment, convenience and sociability. For Shandy Shack, that shift is an opening: a chance to make shandy relevant to a far broader audience and a much wider range of occasions.

Over the past year, Shandy Shack has overhauled its packaging to stand out in a flavoured beer segment. The redesign is sharper and more commercially focused, giving the brand real shelf impact. Fruit flavour and shandy lead the message, backed by quality beer credentials and a prominent 2.5% ABV.

“That clarity counts in a busy fixture,” says Alex Wilcox, senior brand manager for SHS Drinks. “Shoppers need to know quickly what a product is, how it will taste and why it suits them. By putting flavour, refreshment and moderation front and centre, Shandy Shack appeals both to existing drinkers and to those crossing over from RTDs, spritzes and other flavour-led serves.”

Innovation is also about taking shandy beyond its summer heartland. The brand is exploring winter limited editions and brand collaborations, keeping the range culturally relevant and giving drinkers new reasons to return. The aim is a proposition with year-round potential that still holds its natural link to sunshine, festivals and socialising outdoors.

Building a community

Shandy Shack has built a community of ‘Shandy Shackers’, engaging through



“Shoppers need to know quickly what a product is, how it will taste, and why it suits them”

email, direct messaging, Instagram and TikTok. Its social strategy frames shandy as a culture, not just a format – showing how the brand fits modern lifestyles. Timely content tied to cultural moments, sport, calendar events or the weather keeps the brand relevant and turns engagement into action. A recent viral TikTok shows the reach on offer, while social channels point drinkers towards stockists or Shandy Shack’s direct-to-consumer site. That connection turns physical through sponsorships, festivals and live events – meeting consumers where they are to spark trial and build an emotional bond the fixture alone can’t deliver.

Making fixtures easier to shop

Retailers should therefore complement clear category navigation with occasion-led merchandising. Grouping relevant products around summer socialising, hosting or mindful drinking could make fixtures easier to shop and encourage discovery beyond the shopper’s original intention.

For Shandy Shack, that’s where the proposition comes into its own: full of flavour, naturally sociable and refreshingly moderate – a lighter, easy-drinking choice made for the moments shoppers want to last a little longer.





WHO SAID MODERATION HAD TO BE BORING?

**UNBELIEVABLY
GOOD SHANDY,
GROWING +12%
YEAR ON YEAR***

**TASTE THE
FRUIT BEER
REVOLUTION**



VEGAN



GLUTEN-FREE



MID-STRENGTH

How WKD meets new occasions

DETAILS

SHS Drinks
Manderson House,
5230 Valiant Court,
Delta Way, Brockworth,
Gloucester, GL3 4FE

KEY CONTACTS

Scott Bell
Marketing Director
Alastair Unite
Senior Brand Manager

KEY BRANDS

WKD

Drinkers are no longer shopping the way the fixture is built. The biggest shift in the ready-to-drink (RTD) market is not what people are buying but why. Occasion now drives the choice, not the category. Gen Z shoppers rarely arrive with a fixed category in mind. Planned pre-drinks, a spontaneous round, a house party: the moment dictates the purchase.

For WKD, that reframes innovation. A new product has to answer a real need, giving consumers a reason to reach for it and retailers a reason to stock it.

The strength of the RTD market demonstrates the scale of that opportunity. The category is now worth more than £817m annually, having grown by 25.5% in value and 14.7% in volume over the past year¹. WKD is contributing to this category momentum, with sales up 10.3% in value and 12.5% in volume over the peak 12 summer weeks².

The clearest growth is coming from pairing RTDs' convenience with innovation and experimentation: bolder flavours, varied strengths, new formats, and cocktail-inspired serves. WKD X, a higher-strength caffeinated proposition, is up 56.1% in value and 56.0% in volume³. "Higher abv and enhanced RTDs are seeing growth particularly with Gen Z, and with university around the corner this range is well placed to meet those key Freshers' week occasions," says Scott Bell, marketing director for SHS Drinks.

WKD Cocktails, developed by bartenders, brings on-trade favourites Cheeky V, Blue Lagoon and Venom home in ready-to-pour formats for at-home occasions. "The range is designed to meet those at-home cocktail



“Brands need to create genuine consumer pull through a combination of distinctive positioning, relevant innovation and effective activation”

occasions and provide retailers with opportunities to list unique flavours on fixture and reduce duplication within their range,” says Bell.

Moderation is reshaping the fixture too. Drinkers now move between alcohol and low & no depending on the moment, without dropping their expectations on flavour, sociability or brand. “WKD 0.0% gives consumers an alcohol-free way to remain part of the brand experience,” says Bell.

But great products alone are not enough. Brands need to create genuine consumer pull through a combination of distinctive positioning, relevant innovation and effective activation.

For WKD, the £10m ‘Got a WKD Side?’ campaign is helping maintain visibility, relevance and conversation around the brand. When consumers reach the point of purchase, chilled stock, prominent positioning, clear pricing, well-timed secondary displays and dependable availability are what convert that interest into sales.

Merchandising increasingly reflects the way consumers shop for drinks. Occasion-led displays built around moments such as pre-drinks, seasonal socialising, parties, sports events or moderation can make fixtures easier to navigate, encourage discovery and drive incremental purchases.



Source

- ¹ Nielsen – MAT Value & Volume Sales to 11.07.26
² Nielsen – 12-week Value & Volume Sales to 11.07.26
³ Nielsen – MAT Value & Volume Sales to 11.07.26

TRENDS CHANGE.

BLUE REMAINS.



+18.2%
SALES

+17.3%
VOLUME

GOT A

SIDE?

Why cider's future is bright

DETAILS

Thatchers Cider
Myrtle Farm
Sandford
Somerset BS25 5RA.
t: 01934 822862

KEY CONTACTS

Joanna Austin
Commercial Director

KEY BRANDS

Thatchers Gold
Thatchers Haze
Thatchers Juicy Apple
Thatchers Katy
Thatchers Vintage
Thatchers Blood Orange
Thatchers Blood Orange 0.0
Thatchers Apple & Blackcurrant
Thatchers Zero

At Myrtle Farm in Somerset, the long-awaited apple harvest has arrived. With it comes fresh momentum in cider, with Thatchers the driving force. Thatchers has become the UK's number one cider brand in the off-trade against a backdrop of strong category growth. That growth spans the portfolio: favourites Gold and Haze continue to perform strongly, while innovation attracts new consumers. Juicy Apple, a light, sweet cider, is recruiting a new generation of drinkers. Thatchers Zero and Blood Orange 0.0 unlock further growth in low and no. Thatchers continues to invest in innovation and brand building, shaping the future of the iconic drink.

Thatchers' performance, innovation and long-term investment saw them named Drinks Brand of the Year at The Grocer Gold Awards. "It was a particularly proud moment for the family and the team," explains Martin Thatcher, fourth-generation cider maker. "Reading the judges praise us, noting our 'performance in a category dominated by deeper-pocketed multinationals', as well as our 'commitment to quality, sustainability and innovation', made the team take stock of everyone's efforts."

With consumers increasingly looking for brands with genuine provenance and values, authenticity has become more important than ever. Family-owned Thatchers has been making cider for 122 years. Generations of expertise go into making every pint.

Attracting new consumers

"Social media has become an important way of bringing consumers closer to our world," says Thatcher. "It has given us the opportunity to take people behind the scenes, from pip to pint, sharing stories from the farm, orchards and cider makers and showing all that helps shape our brand." Festival content and consumer engagement extend that story further, creating a connection between what happens at Myrtle Farm and the moments when Thatchers is enjoyed.

This is backed by significant investment in visibility. High-profile



“Social media has become an important way of bringing consumers into our world”

TV and video-on-demand, national outdoor, social, sports sponsorship, festivals and record levels of sampling are carried through to point of purchase. The 'Brighter Days' campaign helped connect the brand with new cider occasions, while Gold has achieved the highest advertising awareness of any cider brand².

Innovation with purpose

Innovation is also broadening why people choose cider. "Juicy Apple, originally available as a limited edition in our Cider Barn collection, proved so popular we launched it within our core range," says Thatcher. "It remains in launch phase, ensuring it gains lots of marketing support. NPD also includes Blood Orange 0.0 and pint cans in convenience. And we are preparing to launch Thatchers Zero in a 10-pack before the end of the year."

Consumer demand is evolving, he notes. "Increasingly, alcoholic and low & no coexist across the same social occasions, making choice, space and physical availability critical to support both trial and repeat purchase."

However, Thatchers' ambition is bigger than growing one brand, he adds. "We aim to combine our story – the authenticity and craftsmanship of more than a century of cider making – with innovation that attracts new consumers."



Source

¹ NIQ, Cider, Value, 52 w/e 08.08.26

² Savanta, L12M to July 2026

PROUD TO BE NAMED DRINKS BRAND OF THE YEAR 2026



G

**The Grocer
Gold Awards**
2026

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