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The Grocer Guide to...

The
Grocer

Alcoholic Drinks incl Low & No



Analysis

Sobering sales

While the spirits sector is facing a challenging market, other sectors – particularly RTDs and low & no – are enjoying continued success, capitalising on consumers' health awareness and sense of adventure



↘ It has been a summer of sobriety – well, at least according to Waitrose, which identified growth in the ‘sober curious’ movement earlier in the season as sales of its low & no drinks soared by 32%¹.

Meanwhile, the hot weather has lent itself to outdoor revelry, including festivals of all kinds, where ready to drinks (RTDs) are proving to be the star performer². And the RTD cocktails and spirits market, while delivering just 4% of the volume in ‘long alcoholic drinks’, is dishing up 9% of the value, according to Grocer sister magazine Food Manufacture³.

However, the spirits sector continues to be challenging, as producers face the combined impact of high inflation, low consumer confidence and evolving consumption habits, says LMB UK commercial director Ruaridh Paterson.

“LMB UK’s portfolio is proving resilient in this difficult market – in particular our two focus brands Glen Moray single malt whisky and Bardinet Brandy. These are authentic, high quality but accessible brands that people can afford to put into their basket.

“Consumers still want quality spirits brands to enjoy at home, but we are possibly seeing a return to more classic SKUs, drinking occasions and serves, as the thirst for experimentation and new flavours slightly slows and consumer tastes evolve,” he adds. “There are still trends that can make huge waves in the industry, however – for example this year’s craze for the spritz and its shift towards the Hugo and Limoncello varieties. These are exciting opportunities for spirits companies with the right products in their portfolio to respond to demand,

as was the case for LMB UK this summer with our Italian Villa Cardea Limoncello brand.”

Meanwhile, although the UK’s beer market may be experiencing an overall volume decline, value sales are up, driven by consumers seeking quality and character in their drinks, maintains Steve Behan, general manager at Duvel Moortgat UK – owner of the Chouffe Belgian beer brand. “World beer and craft are booming, with drinkers hunting for premium, standout styles and bold flavours. As the ‘original’ craft beer, Belgian beer is perfectly placed to meet this demand,” he says. “It’s a category riding several waves of growth through its unique characteristics – it has elements of craft, world and modern ale alongside plenty of intrigue. Retailers should consider this a real opportunity as Belgian beer



brings authenticity, heritage, and that unmistakable flavour that consumers are looking for. As the fastest-growing brand in the Duvel Moortgat global portfolio, with UK sales up 656% since 2019⁴, Chouffe is a clear standout within the category.”

In the cider category, fruit cider has remained one of the most resilient areas, continuing to attract younger adult shoppers even as the wider market has faced inflationary pressure, says Kopparberg senior customer marketing manager Axel Tulip. The company’s focus has been on flavour-first innovation and flexible formats, he says, with positive performance in its Variety Pack, Sweet Vintage high-ABV cider and Alcohol-Free products.

“We’ve seen continued growth in at-home occasions as more people recreate premium experiences

outside the on-trade,” he says. “For Kopparberg, this has translated into strong demand for multipacks and variety formats, which are increasingly being bought for social gatherings like BBQs, house parties and big nights in. Chilled 500ml cans are also proving popular in convenience and forecourts, aligning with the ‘drink now’ mission. In alcohol-free, moderation is no longer limited to just Dry January. While January remains a key trial month, consumer insight shows that engaged alcohol-free drinkers are now incorporating these options into their routines year-round, particularly in summer when refreshing flavours like fruit cider are a natural fit.”

At packaging company DS Smith, the drinks category is one of its most significant categories, says Ashwin Moorthy, head of design & innovation

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at DS Smith Packaging UK & Ireland. Perhaps reflecting the overall health of the wider category, the company is seeing strong volume growth in the UK. However, he adds: “We know that the category is facing challenges and a slowdown in volume, with a shift towards mindful consumption, where consumers are moderating their alcohol intake – more evident among the younger set. However, this has seen the low & no alcohol category grow, bringing new occasions and innovations.

“With the rising costs of going out, some consumers will treat themselves and trade up to premium products when at home. We expect shoppers to purchase more premium products around key events and holidays.

“We also see some consumers behaving more price consciously as

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financial pressures run high, making adults feel unsteady about their finances, so brand need to work even harder to prove their value.”

Formats and styles making waves

Flexibility and innovation in both format and ABV are driving strong growth across the cider category, says Kopparberg's Tulip. High-ABV cider is one such standout performer with year-on-year growth in this segment outpacing others, showing that shoppers are seeking bolder flavour and alcohol profiles when they trade up, he says. “That’s why we’ve expanded our Sweet Vintage range with the launch of Sweet Vintage Apple, adding to the existing Sweet Vintage Pear SKU.

“Formats like multipacks, especially variety assortments, remain powerful for planned social occasions, while chilled 500ml cans continue to shine in convenience and ‘drink-now’ missions. These formats are complemented by our flavour innovations, such as Kopparberg Mango and Crisp Apple that cater to the growing demand for tropical and sweeter apple profiles. Beyond cider, the ready-to-drink (RTD) cocktail category is also booming: spirit-based RTDs are leading market growth, with younger consumers driving a surge in both value and premium, convenient cocktail options.”

Duvel Moortgat's Behan notes that, for beer, “today’s drinkers want more than just a pint, they’re chasing flavour, variety, and adventures worth sharing”, he says. “With demand for craft beer remaining strong, and one-third of craft beer drinkers regularly consuming Belgian and other speciality styles⁵, the UK has really embraced La Chouffe and Chouffe Cherry.” The company is now introducing the first- Belgian IPA ever brewed to the UK, he adds. “It’s already winning fans in other countries by combining hop-forward craft character with Belgian brewing depth, and we’re confident British drinkers will be just as keen to explore it.”

Kristiane Westray, spirits expert and advisor to the EU’s ‘More Than Only Food & Drink’ campaign, says there’s a real demand for flavour innovation and convenience at the moment. “This is informing a lot of the momentum we’re seeing in canned products, but also unusual – or perhaps unexpected



– flavoured line extensions,” she says. “According to a CGA report released earlier this year⁶, 19% of consumers say they drink because they like experimenting with different flavours or types of alcohol. The same report found that cocktails are seen as the most innovative type of drink. That, coupled with convenience, shows why ready-to-drinks are proving so popular. These formats are a huge opportunity for EU distilleries. While spirits made to PGI standards guarantee authenticity and quality, they also create an

ecosystem where inventiveness can thrive.”

LMB UK's Paterson agrees that the RTD market is continuing to grow, from a convenience point of view and for people who are looking for bar-quality pre-mixed cocktails to enjoy at home. “Lower ABV spirits are now a fixture of all spirits aisles offering choice to consumers looking to moderate their drinking,” he observes. “Within categories that exploded with new flavours and NPD in the past few years, to some extent we are seeing a consolidation and return to trusted and favourite spirits products for some retailers, although there is still room for innovation and things that are genuinely ‘new’.

“It’s worth noting, however, that price always looms large in our sector. It will continue to be influential when it comes to which products will succeed and grow in each spirits category.”

“Within categories that exploded with new flavours and NPD in the past few years, to some extent we are seeing consolidation and a return to trusted favourites”



Broadening out the seasonal spikes

Spirits is a seasonal sector, says LMB UK's Paterson, adding that the company will always invest to make the most of the key moments in the retail calendar – from summer spritzes and highballs to the big festive and gifting opportunity for whisky at the end of the year. “However, to make your mark in the spirits aisle, you have to do something that stands out,” he notes. “We have had some big wins with trade and consumer audiences this year with our ‘Classic Round’ golf campaign for Glen Moray, which is rooted in our official whisky sponsorship of the Senior Open Championship, and which we have

activated widely across the grocery channel. The same goes for our recently launched ‘Chez Bardinnet’ campaign and its celebration of Bardinnet VSOP.”

Westray, from the EU's ‘More than Food & Drink’ campaign, says “spirits are inherently giftable, which means there are always year-round opportunities to reach consumers. “Irish Whiskey PGI, Whisky d’Alsace PGI and more make incredible presents, from birthdays to corporate gifting and beyond,” she says. “Seasonality is certainly shifting, too. The bolder consumers become with at-home cocktail making, for example means

that the aperitifs conventionally associated with long drinks and summer sipping, are increasingly popular all year round.”

While seasonal peaks are still important, drinkers are exploring premium beers all year round, meaning there's more opportunity beyond the classic summer and Christmas spikes, says Behan at Duvel Moortgat. “Magnum-sized beer bottles, like our limited-edition Big Chouffe, drive other celebratory occasions, and the Chouffe Discover Packs are popular well into spring and autumn. The darker, more complex N’Ice Chouffe ale always brings in

winter warmth, while Chouffe Cherry shines in the summer.”

And while summer continues to deliver the biggest uplift in cider, particularly for fruit and tropical flavours, the festive period has also become an important sales moment, says Kopparberg's Tulip. “Our Kopparberg Variety Pack is especially popular at this time of year, giving shoppers a mix of flavours that cater to different tastes at festive gatherings. At the same time, higher-ABV products such as our Sweet Vintage range perform strongly in the colder months, when high-tempo occasions are being recreated at home.”

Flavour exploration

In 2025, flavour exploration is the name of the game, drinkers are more adventurous than ever and want beers that surprise them, says Duvel Moortgat's Behan. “The Belgian classic, La Chouffe, has won the heart of Brits with sales growing by 422%⁷ since landing in UK retail five years ago. Recent years, however, have been dominated by Cherry – an exciting flavour that has taken the UK by storm and has shown significant growth in market.”

When chatting with bartender partners, it has become clear that savoury cocktails and botanical spirits are seeing a huge surge in popularity, says the EU campaign's Westray. “[These include] tomato-based serves, pickle as an ingredient, and even Parmigiano Reggiano PDO from Italy as a garnish – it appears that our craving for sweet treats has lessened. Gins, vodkas, genevers and absinthes are

essential ingredients in these savoury-leaning cocktails and innovative distillers across the EU are using local herbs, flowers, fruits and even seaweed to offer not just a sense of place but phenomenal flavours for bartenders, too. It's exciting to taste the creative possibilities.”

Tropical flavours are in high demand across categories with cider being no exception, reports Kopparberg's Tulip. “Our launch of Kopparberg Mango earlier this year reflects this trend and has already shown strong early results, particularly in summer,” he says. “Alongside tropical, apple cider is seeing a resurgence as shoppers rediscover the style for at-home occasions. Kopparberg Crisp Apple was launched in response and offers a fresh take on the classic, blending traditional refreshment with the sweeter flavour profile.”

When it comes to packaging and in-store impact, brands need to have

shelf standout and a point of difference. According to DS Smith's Moorthy, this includes calling out key purchase triggers like unique flavours and taste.

The unstoppable rise of low & no

No & low-ABV spirits are here to stay – and we, as an industry, should be delighted about it, says the EU campaign's Westray. “Through equity and accessibility lenses, they open up premium bar and hospitality experiences that just were off-limits to many,” she notes. “Whether it's 0.0% or lower-ABV options, there are more opportunities than ever for quality cocktails and drinks for those that don't consume alcohol or who don't want to for whatever reason on a specific occasion. Consumers expect these options now – according to Portman Group figures⁸, 38% of UK drinkers say they enjoy low and no alcohol alternatives ‘semi-regularly’. That's certainly mainstream. When it comes

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to EU spirits, the likes of Italian Amaro, French Suze and German Kräuterlikörs all create grown-up, yet low-ABV serves when paired with a mixer.”

Growth in low & no remains high, confirms DS Smith's Moorthy. “Within RTDs, the common pack format is canned drinks, including cocktails and pre-mixes,” he says. “However, we are seeing some brands move to lightweight glass, which will mean the need for greater protection in transport packaging.”

Kopparberg's Tulip agrees that moderation is now firmly part of mainstream drinking behaviour. “Alcohol-free products are no longer chosen only in moments when people ‘have to’ avoid alcohol, but are increasingly integrated into year-round repertoires,” he says. “Our research shows that the majority of engaged alcohol-free consumers are dual users – they still drink alcohol but make conscious choices to moderate, motivated by health, balance and inclusivity.”

In response, Kopparberg is launching a “first-to-market” innovation for cider this December: the Kopparberg Party Pack, he reveals. “This pack brings together a variety of our bestselling fruit cider flavours, alongside three free alcohol-free cans, giving shoppers the perfect solution for mixed drinking occasions. It recognises that shoppers want choice and flexibility within one purchase and ensures that moderation doesn't mean compromising on the signature Kopparberg taste.”

While low & no is still growing fast, mindful drinking is the bigger story, believes Duvel Moortgat's Behan. “People want to manage their intake without trading down on taste or quality. With Chouffe, that might mean starting with a classic 8% to sip and savour, before switching to our La Chouffe 0.4%, or our 4% Chouffe Session for longer, more sessionable drinking occasions. It's about giving people choice and flexibility.”

Challenge and opportunity

The resilience of premiumisation is one of the biggest opportunities in the alcohol category in 2025, and shows no signs of slowing down, says Duvel Moortgat's Behan. “World beer is also in growth, and Belgian beer's authenticity and diversity of flavour are a real draw for curious drinkers,”



he says. “The challenges are clear too. Overall beer volumes are declining, and younger consumers are drinking beer less often than before the pandemic, which means the low & no segment will continue to be important. We also face strong competition from other accessible premium world beer styles, German and Czech in particular, so standing out with flavour, storytelling, and brand personality will be key.”

However, balancing that premiumisation with value will be the biggest challenge for the cider category

in the year ahead, says Kopparberg's Tulip. “With recent duty rises and ongoing pressure on household budgets, it's a careful balancing act to make sure we deliver a quality, premium cider at the right ABV and the right price point for shoppers.”

While the low & no-alcohol market is burgeoning, space in-store is at a premium, he adds. “So, the focus for retailers needs to be breadth of range and limiting duplication,” he says. “For us, that means ensuring we cover the key alcohol-free missions with our core bestselling flavours, the Alcohol-Free Variety Pack, and innovations such as the new Party Pack.”

Meanwhile, keeping innovation fresh in fruit cider... is vital to excite shoppers, he notes. “These are all challenges, but they are also our biggest opportunities: to strike the right balance between premium and value in a pressured economy, to continue to lead in alcohol-free fruit cider by

“Balancing premiumisation with value will be the biggest challenge in the year ahead – given recent duty rises and pressure on household budgets”



Sustainability continues to resonate

While a study from Imperial College London¹ suggests consumers have shifted away from considering the environmental impact of their purchases, the world is still facing climate breakdown, notes the EU campaign's Westray. "Even when consumers genuinely care about the environment, they often fail to act on these principles by making sustainable choices," she notes. "This is commonly held to be due to barriers such as higher prices for environmentally friendly options. That puts even more onus on the industry to make sure their supply chain is as

green as possible. A huge part of this lies with distillers – spirits production is inherently energy- and water-intensive. However, small-scale producers across the EU are committed to sustainability. From cutting out road miles through sourcing local products or making serious production efficiencies, EU brandies, vermouths, whiskies and more are increasingly sustainable."

"Sustainability and packaging continue to play an important role for consumers, with many now expecting brands to be environmentally conscious – for instance, within their production process

and in packs," says Moorthy at DS Smith. "Consumers continue to expect products to be packaged in as little material as possible."

However, one challenge in the year ahead will be cost pressures for business and the fact that plastic usage for multipacks and transport is still very high in the alcoholic drinks category, creating sustainability issues, he observes. "Although PET and aluminium are common material types, they are associated with environmental concerns, while glass is heavy and fragile, increasing transportation

costs and breakage risk," he says.

For the Chouffe brand, sustainability "isn't just a tick-box exercise, it's part of our story" says Behan at Duvel Moortgat UK. "We run on 100% green energy, have planted over 20 hectares of forest, reduced water use per hectolitre by 22% since 2014 and keep beehives at the brewery in Belgium," he says. "What really resonates with our drinkers is that these initiatives are tied to our home in the Ardennes. They can picture the forests, the bees and the landscape they are helping to protect every time that they decide to choose a Chouffe."

delivering breadth of flavours without duplication, and to keep fruit cider exciting through continued flavour and format innovation."

In terms of packaging, DS Smith's Moorthy says there is an opportunity to elevate brand differentiation and connection at shelf level and the chance work in greater detail on circular-ready packaging that also protect products and ensures damage limitation."

Meanwhile, LMB UK's Paterson points to the huge amount of competition in the spirits sector, saying that brands are going to have to focus on their core strengths, stay agile and really understand what customers and consumers want in the year ahead. "LMB is a business with a long-term outlook, a strong portfolio and a structure that allows us to stay nimble, responsive and competitive in the market. The unpredictability of the global marketplace will continue to be a challenge, as will the ongoing

financial pressures our consumers face with their monthly spending," he says.

Indeed, the ongoing squeeze on discretionary spending is a painful challenge that we're all too familiar with. And there's little respite in sight, says the EU campaign's Westray. "To survive it, it's about going back to the best marketing practices, getting as close as possible to your customer, and ensuring you really understand what they're looking for. The sheer breadth of flavour and styles on offer from EU spirits makers means there's something for everyone and is a great place to start when building an assortment.

"Two secondary challenges would be meaningfully reaching increasingly fickle and trend-driven Gen Z consumers, and adding perceived value in our price-sensitive market," she adds. "Again, EU spirits, with their inherent authenticity, sustainability and quality, make a compelling choice."

While no- & low-alcohol products

are steadily advancing their presence in the UK market, they still only make up a small percentage of overall sales and are predicted to reach just a 0.9% share of total alcohol sales volume in the on-trade and 2.3% in the off-trade sector by the end of this year². So, while it's important for suppliers to bear this rising trend in mind, perhaps more important is keeping a close eye on the innovation and flavours that will excite the younger generation. And, above all, quality, transparency and value look likely to be the criteria that will dominate the alcoholic drinks category, including low & no, across the rest of 2025 and into 2026.

Sources

¹ <https://tinyurl.com/8pd3b722>

² <https://tinyurl.com/mwbz6a94>

³ <https://tinyurl.com/3dn4pk8w>

⁴ Duvel Moortgat financial results 2019-2024

⁵ The SIBA Independent Beer Report, 2024

⁶ <https://tinyurl.com/33snxp4x>

⁷ See 4

⁸ <https://tinyurl.com/mwjz8jrd>

⁹ <https://tinyurl.com/2t94mmrj>

Sustainability

¹ <https://tinyurl.com/4kdj67b5>

Packaging that performs

DETAILS

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KEY PRODUCTS

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Industrial Packaging
E-commerce Packaging
Point of Sale Display
Solutions
High Quality Print
Recycling Services

↙ Across the drinks sector, change is coming thick and fast, notes Ashwin Moorthy, head of design and innovation at DS Smith. “From the explosion in no-and-low alcohol to the rise of functional wellness drinks, the product landscape has never been more dynamic,” he says. “At the same time, regulation is stepping up, with Extended Producer Responsibility (EPR) legislation and future labelling requirements coming into play, while input costs continue to bite. This places packaging firmly in the spotlight.”

DS Smith works closely with drinks brands to meet these evolving demands. “Our role is to help customers stay compliant, sustainable and cost-effective, without sacrificing brand experience,” explains Moorthy. “The shift away from plastic and towards fibre-based alternatives is well under way, but for many, glass remains the popular primary packaging, especially in beer, cider and spirits. That brings a unique set of challenges: cost, weight, fragility and carbon impact.

“However, these pressures also elevate the importance of secondary packaging, which plays a critical role in ensuring products are protected, easy to handle, and shelf-ready. That’s exactly the innovation space we’re focused on, with our Round Wrap product a great example of that.”

Making the Round count

DS Smith Round Wrap is a fully recyclable, fibre-based multi-pack solution for bottles and cans. Technically proven on multiple packaging lines, it delivers a premium, curved design that stands out on-shelf and is as stable as standard corrugated boxes used in transit. “In trials, it has reduced CO2 emissions by up to 24%, with potential for stretch film reduction of up to 20%,” reveals Moorthy.

“Crucially, it’s designed to work on existing machinery with minimal adjustment – a key benefit for brands navigating both cost and

**We don’t
cut corners...
we round
them**



“**Standout design and sustainability can go hand in hand. Round Wrap offers both and is a response to multiple pressures facing drinks brands today**”

operational pressures. The structure optimises fibre usage, reduces corner crushing in transit, and provides a canvas for strong branding thanks to large, continuous curved corners. Standout design and sustainability can go hand in hand. Round Wrap offers both.”

Round Wrap is a response to multiple pressures facing drinks brands today: the need to cut emissions, reduce plastic, elevate on-shelf presence, and streamline operations, he adds. “Its curved design doesn’t just look good, it reduces material waste, improves pallet stability, and runs at the same speed as existing production lines. It also supports refillable models, as it can incorporate design features for returning empties, and aligns with regulations, including upcoming EPR requirements, giving brands a credible, future-fit packaging solution.

“As drinks categories evolve and sustainability expectations grow, Round Wrap demonstrates how packaging can deliver on performance while enhancing on-shelf presence.

“As drinks brands navigate what’s next, DS Smith will continue to bring together technical rigour, creative design and real-world implementation support to help our customers respond to the challenge.”

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*CO₂ reduction percentage can differ depending on the comparable existing wrap.

Redefining Belgian tradition

DETAILS

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KEY BRANDS

La Chouffe
Chouffe Cherry
La Chouffe 0.4%
Chouffe Session 4%
Chouffe IPA
McChouffe
N'ice Chouffe

“Over the past year, our focus has been on making Belgian beer more accessible and relevant to modern-day British drinkers without compromising on the quality, craftsmanship and authenticity that defines Chouffe,” says Steve Behan, general manager at Duvel Moortgat UK.

While UK beer market volumes are slightly down, value is undeniably up, driven by the shift towards consumers drinking less, but seeking quality and a point of difference. And while British drinkers were previously less familiar with Belgian styles – or held misconceptions that they were all high in alcohol, heavy in body, or overly traditional – the category has seen significant growth as drinkers actively seek out differentiation on shelf.

“As the fastest-growing brand in the Duvel Moortgat global portfolio – with volumes tripling in the past four years and UK sales up 656% since 2019¹ – Chouffe is well placed to lead this shift,” he adds. “Since our 2021 launch in UK off-trade channels, we’ve worked to break down those barriers to Belgian beer with approachable new products.”

La Chouffe Alcohol Free 0.4%, delivers the depth and flavour profile expected from a speciality Belgian beer in the fast-growing no & low category, while Chouffe Session (4%), is a sessionable ale that’s approachable and refreshing, yet still unmistakably Chouffe. Both are designed to meet the needs of mindful drinkers and those seeking lighter options without sacrificing on taste, notes Behan. “They sit alongside our iconic La Chouffe, the rich and warming N’ice Chouffe, the smooth and malty McChouffe, and the fruity Chouffe Cherry, ensuring we have



“Our brand new Chouffe IPA is a discovery product with real commercial impact”



a Belgian beer for every adventure.

“The latest product in the pipeline is our brand new Chouffe IPA (9%) which launches in the UK this month. This is the first Belgian IPA ever brewed, and it perfectly bridges two high-growth areas: hop-forward craft beers and authentic world beers. “It’s a discovery product that delivers real commercial impact, sparks conversation and keeps customers coming back,” explains Behan. “Chouffe IPA comes in our refreshed packaging that has just rolled out globally. Its brighter colours and bold, modern typefaces, along with an illustrated Ardennes Forest landscape, help the range stand out, making it easier for shoppers to navigate.

“With premiumisation remaining a key trend, alongside a growing appetite for exploration, especially among younger drinkers, beers like Chouffe Cherry, Chouffe IPA and our seasonal editions are powerful drivers of trial and incremental sales. Mindful drinking and ABV choice are also big factors, which can be seen across our range, from 0.4% to 9%,” adds Behan. “For retailers, the opportunity is clear: stock premium Belgian beers that offer authenticity and variety, and use bold, distinctive products like Chouffe as the hook to draw in curious drinkers.”

Source

¹ Internal company data

STAY CURIOUS



Chouffe is the fastest growing
brand in our UK portfolio with
sales up by +656% YOY*

To contact our sales team and for more
information, please scan the QR code



Please drink Chouffe responsibly

*Chouffe UK sales up by +656% since 2019



A spirit for every palate

DETAILS

For more information on the EU's 'More Than Only Food & Drink' campaign, visit <https://enjoy-its-from-europe.campaign.europa.eu/united-kingdom/en>

To find out more about the campaign, contact: morethanfood_uk@agripromotion.eu

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KEY PRODUCTS

Cassis PDO
Cognac PGI
Genever PGI
Irish Whiskey PGI
Polish Vodka PGI
Swedish Aquavit PGI



With Christmas fast approaching and festive shopping lists taking shape, spirits expert Kristiane Westray – ambassador to the EU's 'More Than Only Food & Drink' campaign – shares her insights into the bottles that deserve a place on every festive table or gift list.

"The European Union (EU) is renowned for its rich array of heritage spirits and celebrated distilling traditions," says Westray. "From Swedish Aquavit PGI and Irish Whiskey PGI to Italian vermouths and French Cognac PGI, there's an extraordinary breadth of flavour across the continent."

"Whether for sipping, serving or as a present under the tree, EU distillers are the perfect choice to bring the festive spirit, she notes. "EU exports of spirits and liqueurs totalled €8.9bn globally last year¹, so the potential and popularity of these remarkable bottles is hardly a secret. But with the vast wealth of flavour, backed by the exacting and renowned Protected Geographical Indication (PGI) and Protected Designation of Origin (PDO) marks means there's always something new to discover, especially in terms of sustainable, authentic products. These certifications ensure each bottle meets high-quality standards and embodies the unique craftsmanship and traditions of its origin."

As an example, she cites Cognac PGI from France. "This elegant, complex aged brandy is made to meticulous PGI standards," she says. "From the location of the vineyards to the specific harvest dates, the direct-fired stills and minimum oak ageing, every step of the process is a craft. While a handful of well-known houses front the category, there are as many as 300 brands, so there's something for even the most ardent Cognac-lover. And the vibrant fruit, silken caramel and spiced flavour profile are deliciously festive."

Made across the entire island of Ireland, the single malts, single pot still and blended styles of Irish Whiskey PGI offer a beautifully complex, stunningly smooth sipping and gifting option this Christmas, says Westray. "From peppy, youthful expressions to long-aged treasures, it's a category



“The European Union is renowned for its rich array of heritage spirits and celebrated distilling traditions. There’s an extraordinary breadth of flavour across the continent”

that commands attention. And let's not forget the decadence of Irish cream liqueurs, surely everyone's favourite December after-dinner treat.

"A dash of Cassis PDO from France brings the sweetness of liqueurs to a flute of fizz, while Polish Vodka PGI is an essential cocktail staple for every party," she adds. "Italian vermouths offer an easy route to low-alcohol long drinks, while Swedish Aquavit PGI, Genever PGI from Belgium, the Netherlands, France, and Germany, and gins are a simple way to tap into the savoury cocktail trend."

"We all know how critical the Christmas trading period is, especially in such a tough year for the industry. The sheer breadth of EU spirits brands, with their PGI and PGO status, offer extraordinary opportunities to meet consumer needs this festive season. Whether it's a gift to delight a loved one or ingredients for the Christmas cocktail party, there's a spirit for every palate."

Source

¹ <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20250428-2?>

MORE THAN ONLY FOOD & DRINK

Blending
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MORE...

Discover the quality of **EU spirits** – where protected production methods meet innovation and a commitment to sustainability. From heritage distilleries to modern craft producers, EU spirits deliver great taste, authentic provenance and strong shelf appeal.



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KEY BRANDS

Kopparberg

 Kopparberg has always been synonymous with fruit cider and, in 2025, the brand continues to show why it remains the No.1 choice¹ for shoppers in the category. With shoppers price-conscious but still looking for products that deliver excitement and quality, Kopparberg has continued to invest in flavour-first innovation and flexible formats to meet their needs.

Over the past year, Kopparberg has expanded its portfolio with several standout launches. Kopparberg Mango, launched in March, taps into growing consumer demand for tropical flavours and has quickly become a favourite for summer BBQs, festivals and outdoor gatherings. Kopparberg Crisp Apple has brought renewed energy to apple cider, blending the classic profile with a sweeter edge. Meanwhile, Kopparberg Sweet Vintage Apple and Pear have resonated with younger consumers, reflecting the shift of high-tempo occasions from nightclubs to the home.

“The brand’s ability to balance tradition with innovation is also evident in formats,” explains Axel Tulip, senior customer marketing manager at Kopparberg. “The best-selling Kopparberg Variety Pack offers shoppers the chance to explore multiple flavours in one purchase, and has proven successful for social occasions, from house parties to big nights in.”

“Importantly, Kopparberg also over-indexes during the festive period, significantly outperforming other cider brands in November and December as shoppers trade up to trusted, premium options for celebrations².”

Recognising that moderation is now mainstream, Kopparberg has extended this success into alcohol-free with the Alcohol-Free Variety Pack. This launch has been a major hit, showing shoppers do not need to compromise on taste when choosing 0.0%. Kopparberg Alcohol-Free is now the 4th-biggest brand in total low/no BWS by value and number two by units³, with the highest shopper penetration in the category⁴.

Adapting to the seasons, Kopparberg will again launch its Winter Punch and Spiced Apple variants, both designed for refreshing yet cosy moments in the



“Kopparberg Crisp Apple has brought renewed energy to apple cider, blending the classic profile with a sweeter edge”



colder months, giving retailers a way to extend cider sales beyond summer. “This seasonal rotation, alongside our core and variety ranges, ensures Kopparberg remains front of mind with shoppers all year round,” says Tulip.

Kopparberg has also adapted to changing shopper missions in convenience. 500ml cans, suited to ‘drink now’, have become a rising star in forecourts and smaller stores, while multipacks continue to dominate planned purchases as shoppers stock up for at-home occasions, reinforcing the importance of offering the right formats in the right channels.

Looking ahead, Kopparberg is preparing to launch its most ambitious brand campaign to date, backed by a £6m investment, to position the brand not only as the drink of the summer, but as an all-year-round refreshing choice. The brand will double its spend on social and influencer media to attract the next generation of drinkers, ensuring it stays as relevant to those aged 18-24 today as it has been for the past 25 years. Through this activity, Kopparberg is set to build on its reputation as the UK’s most loved and preferred alcoholic drinks brand⁵.

Source

- ¹ Circana data, Major Multis, CWD Value rate of sale, 12 w/e 22.03.25
- ² Circana Market Advantage, Value Sales Index, 2024
- ³ Circana data, Major Multis, Total Low/No, value/unit sales, 52 w/e 19.04.25
- ⁴ Kantar, Penetration tracker, 52 w/e 29.12.24
- ⁵ Kantar Myworldpanel, Total Retailers, Buyers aged under 28, 52 w/e 29.12.24

No Brand Adds More Value At Christmas Than Kopparberg

Make sure you're stocked up for Christmas

Source: Circana Market
Advantage, Value Sales Index,
full Year 2024.

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An agile response to trends

DETAILS

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KEY BRANDS

Glen Moray Speyside single malt Scotch Whisky
Bardinet Brandy
Cuttie Sark blended Scotch Whisky
Label 5 blended Scotch Whisky
El Galipote Rum
Sobieski Polish Vodka
Villa Cardea Limoncello
Warner's Gin



For LMB UK – the UK home of leading global wine & spirits group, La Martiniquaise Bardinet – premium quality at a great price continues to be the sweet spot for spirits sales, reveals UK commercial director Ruaridh Paterson.

The company's popular Speyside single malt Scotch whisky, Glen Moray, is one of the UK's top five brands in its category, with the Glen Moray Classic SKU in positive growth of +0.2% in volume and +0.3% in value¹. Portfolio stablemate Bardinet Brandy is also enjoying a period of accelerated growth with its core Bardinet VSOP outperforming the French grape brandy category, with +3.5 % volume and + 7% value growth².

“Our star performers are supported by an extensive range of brands in the LMB global portfolio, allowing the UK team to respond quickly to consumer trends as they emerge and supply the right commercial mix to trade partners,” he says. “Most recently that includes El Galipote spiced rum, Villa Cardea Limoncello and the Polish rye vodka Sobieski – with the UK's trailblazing Warner's Gin joining our portfolio this summer.”

Glen Moray and Bardinet at the core

Glen Moray Classic is a universal favourite among both trade customers and consumers – and for good reason, says Paterson. “It has been crafted in Elgin since 1897, and few single malts sum up the light, smooth and fruity style of the famous Speyside whisky region better,” he notes.

The company's French-style brandy, Bardinet, has similarly deep roots – founded in 1857 and matured in



“Our star performers – Glen Moray and Bardinet – are supported by an extensive range of brands in the LMB global portfolio, allowing the UK team to respond quickly to consumer trends as they emerge”

warehouses just outside Bordeaux. Its mission now is to inject new dynamism into the brandy category and help consumers discover its delicious, rounded and balanced flavour. “Both are highly versatile spirits, perfect for sipping, mixing into highballs or adding to cocktails,” adds Paterson.

LMB UK is also putting significant marketing investment behind both brands, with a busy programme of trade and consumer activations this year – including the second year of Glen Moray being the official whisky of The Senior Open Championship, and the ‘Chez Bardinet’ events and PR campaign for Bardinet, which leads with the ‘French Mule’ cocktail serve.

“Both Glen Moray Classic and Bardinet VSOP are excellent-quality, highly versatile spirits at a very good price,” Paterson adds. “It's an easy decision for consumers – trusted, accessible brands they can add to their basket, with no compromise on quality and flavour.”

Meanwhile, the company is always looking at what's next for its grocery partners as markets become more unpredictable and consumer tastes evolve. “Our business agility is proving to be a huge strength in grocery,” he says. “Whether it's a high-quality Limoncello to fulfil demand for this summer's spritz trend, or a modern brand for the UK's growing spiced rum market – LMB UK has it covered.”



Source
^{1&2} Nielsen UK, GB Coverage wk
12.07.25

BARDINET

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French Passion*



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Crafted the traditional French way, there's over 160 years of passion and skill in every drop of Bardinet - the UK's second best-selling brandy (Nielsen GB Total Coverage - Latest 52 Weeks Vs Year Ago - WE 09.08.2025). Founded in 1857 by young Frenchman Paul Bardinet, his vision to create quality spirits for all to enjoy stands to this day. Distilled from grapes, aged in oak barrels and expertly blended at Maison Bardinet's estate in Domain de Fleurenne near Bordeaux, these are brandies with a rich, rounded and beautifully balanced flavour.

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To find out more please get in touch with our UK sales team:
sales@glen-moray.co.uk

  [@bardinetbrandy](https://www.instagram.com/bardinetbrandy)

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Beating the market sustainably

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Pernod Ricard UK**KEY BRANDS**Altos
Lillet
Bumbu
Malfy
Jameson
Absolut
Malibu
Kahlúa
Perrier Jouët
G.H. Mumm

Pernod Ricard UK is continuing to gain market share in a challenging UK context, and is increasing investment to support growth of spirits, Champagnes and ready-to-drink (RTDs) following the sale of its wine brands, with equity driving campaigns and long-term partnerships paying off. “We are the No.2 in the world’s second-biggest spirits market¹, so the UK is a clear opportunity for the group, and we are investing behind spirits to drive growth,” says Julia Massies, managing director for Pernod Ricard UK.

This year, the challenger within the UK drinks industry is looking to double-down on the right choices to gain share. “Growth is coming from established brands, such as Absolut, Jameson, Kahlúa, Malibu and our RTD portfolio, as well as categories where we can drive future scale such as agave, rum and the aperitif occasion,” notes Massies. Share gains are being driven in part by equity-driving brand campaigns and long-term partnerships such as: Jameson’s tie-up with the English Football League (EFL); Malibu recruiting legendary actor Brian Cox for its summer campaign; and Absolut partnering with iconic girl group, Sugababes.

Innovation is also key for Pernod Ricard UK, with optimistic early



“We are the No.2 in the world’s second-biggest spirits market¹, so the UK is a clear opportunity for the group and we are investing behind spirits to drive growth”

performance for Jameson Triple Triple ahead of the festive gifting season, as well as Altos Strawberry Margarita ready-to-serve.

“We’ve identified agave as one area in our portfolio where we can drive future scale,” adds Massies. “The recent roll-out of our most exciting media campaign for Altos to date saw bold and witty messaging really cut through this summer. Tequila is an exciting category with huge potential for future growth, and Altos is leading this revolution. Despite tequila’s growth, it’s still just over 1% of the UK spirits market², and we’re driving visibility and retail presence to change this. Altos is the No.1 100% agave tequila in UK grocery³, where we’ve been champions of making bar-quality margaritas accessible and have seen our ready-to-serve flying.”

Beyond its unrivalled portfolio of Premium+ Brands, Pernod Ricard UK is committed to its ambitious sustainability roadmap. “Sustainability is as important to our customers as it is to us and we remain committed to driving our agenda forward with focus and momentum,” says Massies. “We’re focused on responsible drinking initiatives like Drink More Water, Bar World of Tomorrow, and internal Responsible Drinking Trainings. We’re also advancing our carbon reduction roadmap and supporting volunteering and community initiatives – just a few of the initiatives that make Pernod Ricard UK a great place to work.”

**Source**^{1,2} IWSR data³ Nielsen, Spirits, Total Coverage, L52 w/e 14.06.25

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