club mirror

BRANDS REPORT 2025

AT THE HEART OF THE COMMUNITY

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PRODUCED BY CGA BY NIQ

Club Mirror Annual Brand Report – Drinks – 2025

CGA by NIQ are pleased to support the 17th Annual Brand Report for Club Mirror. Club Mirror is the leading publication for the Sports & Social Club channel in the GB On Trade, as CGA by NIQ are the leading analytical and research business for the GB On Trade.

CGA by NIQ monitors all of the On Trade and has a strong representative sample of Clubland that produces this distinctive and most important On Trade channel.

The 17th Annual Brand Report covers all drinks categories identifying the current leading brands in Clubland.

Additionally an overview of the On Trade[1] has been included to show where Clubland stands compared to some other channels such as pubs, and its position within the On Trade as a whole.

The On Trade market – brief summary

On Trade challenges feel like they have grown in the last 12 months.They seem to be over and above the challenges it faced in 2024 that broadly still remain. The trade was severely stressed and tested and yet, what can be seen is resilience – that dogged determination to open the door, welcome customers and serve up an evening's entertainment and socialising. "It's what we do!" is the response when speaking to the licensees and stewards.

The trade associations, in unison, have persistently implored Government for help and support to ease the sector's cost burden. The focus consistently looked for a change to a 5% VAT rate for prepared food, Business Rate relief, and reduction in taxes.

Clubland maintains its durability. **Clubland still accounts for 20% of On Trade premises**.

Clubland drinks trade in 2024 was down, in line with the rest of the On Trade.   Overall 12-month wet sales, as a measure of the whole business, were up by +1.4% against the On Trade's +1.1%. **Only Free Pubs have outperformed Clubland in overall wet revenue.**

Over the last 12 months **Clubland served an estimated 1.08 billion drinks** at a total level. On a per outlet basis, however drinks sold rose 0.5% to 55,166 per annum.

Clubland in growth performed behind Free Pubs in overall second place in On Trade as a whole.

The alcoholic drinks categories have seen process rise in the last 12 months. The price levels rose across all channels by around 5.2%. Clubland was slightly ahead of that but not significantly so. Soft Drinks were slightly different with modest Government influence on pricing. Overall price increased by 5.3%, but in Clubland this was much more moderate where price rose by 3.0%.

In terms of overall popularity **in Clubland Beer and Cider were the most consumed beverage followed by soft drinks with spirits just behind.**

Drinks category performance and the leading brands

The report subdivides total trade into the broad product groups for 10 categories, showing year on year change between 2024 and 2025 for volume and retail value. The % mix details the relative importance of each category based on retail value.

Sports & Social Category trends				
	This Year v Last Year		£m %Mix	
	Hl	£m	This Year	Last Year
Total Drinks		1.4%	100.0%	
Draught Ales	-5.8%	-1.4%	13.4%	13.7%
Draught Cider	-5.5%	-1.6%	6.2%	6.4%
Draught Lager	-1.4%	4.3%	34.2%	33.2%
Packaged LAD	-2.9%	1.7%	6.9%	6.9%
Soft Drinks	-3.8%	-0.9%	15.1%	15.5%
Dark Spirits	-2.8%	4.7%	4.8%	4.7%
White Spirits	-12.1%	-4.5%	7.9%	8.4%
Wine	-4.1%	0.9%	5.8%	5.9%
Liqueurs & Specialities	0.1%	8.1%	5.5%	5.2%
Fortified Wine & Vermouth	-6.0%	-2.1%	0.1%	0.1%
Source OPM 2025 P5 17-May-2025				

Almost all categories of the drinks market are dominated by brands and using retail sales value an assessment of their importance across categories is detailed in the table below. Clubland's top 30 are subdivided into a Top 10, which are in order of retail value whilst the brands in positions 11- 30 are shown in alphabetical order. Alongside each brand, the owner or brands representative company is added.

Clubland's most valuable brands				
Top 10		**Brand Owner**	***Brands 11 to 30 shown in alphabetical order***	
1	**Carling**	**Molson Coors**	***Antica – Sazerac***	***John Smith's - Heineken***
2	**Madri Excepcional**	**Molson Coors**	***Birra Moretti - Heineken***	***Pepsi - Carlsberg Britvic***
3	**Guinness**	**Diageo**	***Birrificio Angelo Poretti - Carlsberg Britvic***	***Pepsi Max - Carlsberg Britvic***
4	**Cruzcampo**	**Heineken**	***Captain Morgan - Diageo***	***Peroni Nastro Azzurro - Asahi***
5	**Smirnoff**	**Diageo**	***Carlsberg Danish Pilsner - Carlsberg Britvic***	***R White's - Carlsberg Britvic***
6	**Foster's**	**Heineken**	***Diet Coke - Coca-Cola GB***	***Stella Artois - Budweiser Brewing Group***
7	**Coors**	**Molson Coors**	***Gordon's - Diageo***	***Strongbow - Heineken***
8	**Coca Cola**	**Coca-Cola GB**	***Inch's - Heineken***	***Tennent's Lager - C & C Group***
9	**Schweppes**	**Coca-Cola GB**	***Jack Daniels - Brown Forman***	***Thatchers Gold - Thatchers Cider Co.***
10	**San Miguel**	**Budweiser Brewing Group**	***Jack Rabbit - Accolade Wines***	***Worthington's - Molson Coors***
Source: OPM 2025 P5 17-May-2025				

The Report

The 10 product categories show the Top 5 brands, selected by annual sales value, are shown in order of magnitude. The relative positions of the Top 5 brands are shown with a ranking for this year and last year. The next ten brands are simply in alphabetical order.

1. Draught Lager

Clubland's biggest category accounts for 34.2% of retail sales in the last 12 months. **In the last year it has performed ahead of the channel overall so Draught Lager is extremely important to Clubland's drinks make-up.**

Carling became the leading beer brand in GB On Trade in late 70s / early 80s, so has been at the top of the tree for many years and the same is true in Clubland. Other brands are relatively stable and place movement is mostly just a place. As ever though there are some exceptions. Madri Exceptional first arrived in late 2021 and has moved into place 2. The other sizeable place gain comes from another Spanish-influenced brand Cruzcampo that has joined the Top 15.

The lager market is a global sector which can be drawn from the Top 15 brands in this list. The origins of the brands are from Canada, England, Australia, USA, Spain, The Netherlands, Italy, Denmark, Czech Republic, Belgium and Scotland – a selection of most diverse origins.

Top Brands ranked by Sales Volume (Hl)				
Dgt Lager	Brands	Rank This Year	Rank Last Year	Movement
Standard	Carling	1	1	0
Premium	Madri Excepcional	2	2	0
Standard	Foster's	3	3	0
Premium	Cruzcampo	4	7	3
Standard	Coors	5	4	-1
Standard	Amstel	These Brands 6-15 are shown in ALPHABETICAL order		
Premium	Birra Moretti			
Premium	Birrificio Angelo Poretti			
Standard	Carlsberg Danish Pilsner			
Premium	Heineken Premium			
Premium	Peroni Nastro Azzurro			
Premium	San Miguel			
Premium	Staropramen			
Premium	Stella Artois			
Standard	Tennent's			

2. Draught Ales & Stout

A most vocal part of the drinks sector where cask and craft beers are supported by CAMRA and SIBA, being their predominant focus. Other bodies support the initiative to create a protected status for traditional cask beer. There are more breweries producing cask and craft beer than for any other product category.

The brands that lead the category remained the same as last year, with two brands Camden Town Pale Ale and Brew XI, joining the Top 15.

Top Brands ranked by Sales Volume (Hl)				
Dgt Ales	Brands	Rank This Year	Rank Last Year	Movement
Stout	Guinness	1	1	0
Ale (Keg)	John Smith's	2	2	0
Ale (Keg)	Worthington's	3	3	0
Ale (Cask)	Greene King IPA	4	4	0
Ale (Keg)	Beavertown Neck Oil Session IPA	5	5	0
Ale (Keg)	Belhaven Best	These Brands 6-15 are shown in ALPHABETICAL order		
Ale (Keg)	Brew XI			
Ale (Keg)	Caffrey's			
Ale (Keg)	Camden Town Pale Ale			
Ale (Cask)	Fuller's London Pride			
Ale (Cask)	Marston's Pedigree			
Ale (Keg)	Sharp's Atlantic Pale Ale			
Ale (Cask)	Sharp's Doom Bar			
Ale (Keg)	Stones Bitter			
Ale (Keg)	Tetley's			

3. Draught Cider

Cider like the ale category had a tough year as measured by volume and retail sales

Across the category there were some positive brand growth developments and this saw Thatcher's Haze joining the Top 5 brands and becoming the second representative for the company.

Overall the Cider brands of Heineken's (Strongbow, Inch's and 4 others) and Thatcher's hold the Top 5 places. **The companies between them sell two thirds of Clubland volume in the draught format.**

Top Brands ranked by Sales Volume (Hl)				
Draught Cider	Brands	Rank This Year	Rank Lat Year	Movement
Standard Cider	Thatcher's Gold	1	1	0
Standard Cider	Strongbow	2	2	0
Premium Cider	Inch's	3	3	0
Standard Cider	Strongbow Dark Fruit	4	4	0
Standard Cider	Thatcher's Haze	5	6	1
Premium Cider	Aspall Cyder	These Brands 6-15 are shown in ALPHABETICAL order		
Standard Cider	Carling Black Fruit Cider			
Standard Cider	Magner's Dark Fruit			
Standard Cider	Magner's Original			
Premium Cider	Rekorderlig Strawberry and Lime			
Premium Cider	Sharp's Cold River Cider			
Standard Cider	Somersby Blackberry Cider			
Standard Cider	Somersby Cider			
Standard Cider	Stowford Press			
Premium Cider	Thatcher's Fusion			

4. Packaged LAD (Long Alcoholic Drinks)

The biggest observation for the Packaged LAD category is at the top of the brand table below. Guinness 0.0% has been very prominent in above the line media with sizeable advertising. Additional news stories about Guinness in that last 12 months will contribute to awareness. It has surged to the top selling packaged brand and it is a non alcoholic beer. It perhaps encapsulates that growing trend for the no-lo subcategory.

Packaged LAD category has been relatively resilient. Volume fell by -2.9% with sales growing +1.7%. In the context of the drinks mix **in Clubland, it held the fifth largest position**. It incorporates all LAD drinks styles and is the ideal opportunity for customers to test those. The recent craft beer development have made cans in the on trade an accepted way to offer alcoholic drinks. That said, most in the list below are one-way glass bottles that are at the centre of the recycling debate which is in its infancy.

Top Brands ranked by Sales Volume (Hl)				
Pack LAD	Brands	Rank This Year	Rank Lat Year	Movement
NAB/LAB	Guinness Draught 0.0	1	16	15
Premium Cider	Kopparberg Mixed Fruits	2	2	0
Premium Lager	Peroni Nastro Azzurro	3	3	0
Premium Lager	Corona Extra	4	4	0
Standard Cider	Magner's Original	5	1	-4
Premium Lager	Budweiser	These Brands 6-15 are shown in ALPHABETICAL order		
Premium Cider	Bulmer's			
Standard Lager	Coors			
Stout	Guinness			
Premium Cider	Kopparberg Strawberry And Lime			
Total Ale (Packaged)	Newcastle Brown Ale			
Premium Cider	Old Mout Cider Berries & Cherries			
Premium Cider	Old Mout Cider Pineapple & Raspberry			
Premium Cider	Rekorderlig Wildberries			
RTD	WKD			

5. Soft Drinks

Soft Drinks were the **second largest category by value**, **at 15.1% of all sales in Clubland**. Two global players dominate the category and whilst the leading player Coca-Cola GB is a longstanding contributor, their competitor has changed. Carlsberg-Britvic has, through the former's acquisition, became the second dominant soft drinks producer in the On Trade.

Coca-Cola and Schweppes standard cola and mixer ranges lead in the fridges of Clubland. Diet Coke holds their other Top 5 position for Coca-Cola GB. It is though Pepsi Max at number 3 spot was the highest placed low-sugar soft drinks brand available.

Across the top brands seven hail from Carlsberg Britvic with six backed by Coca-Cola GB. It was Red Bull, the energy drink and the Fever Tree range of premium mixers that complete the 2025 Clubland top brands list.

Top Brands ranked by Sales Volume (Hl)					
Manufacturer	Brand	Variant	Rank This Year	Rank Last Year	Movement
Coca-Cola GB	Coca Cola	Coca Cola	1	2	1
Coca-Cola GB	Schweppes	Schweppes	2	1	-1
Carlsberg Britvic	Pepsi	Pepsi Max	3	4	1
Coca-Cola GB	Coca Cola	Diet Coke	4	3	-1
Carlsberg Britvic	R Whites	R Whites	5	5	0
Carlsberg Britvic	Pepsi	Pepsi	These Brands 6-15 are shown in ALPHABETICAL order		
Carlsberg Britvic	J20	J20			
Coca-Cola GB	Coca Cola	Coke Zero			
Carlsberg Britvic	Britvic	Britvic			
Carlsberg Britvic	Pepsi	Diet Pepsi			
Red Bull	Red Bull	Red Bull			
Fever Tree	Fever Tree	Fever Tree			
Carlsberg Britvic	Tango	Tango			
Coca-Cola GB	Schweppes	Schweppes Slimline			
Coca-Cola GB	Fanta	Fanta			

6. Dark Spirits

The Dark Spirits category has had no Top 5 movement, with the range of well known brands remaining prominent on the optics of Clubland. In the past 12 months volumes did drop by -2.8% but this was the **third strongest year-on-year trend across Clubland; sales at +4.7% was the second best year on year trend.**

Rum, Bourbon (Tennessee Whiskey), Brandy and Scotch Whisky are the styles represented in the dark spirits category. Their complexity and nuances make it a most interesting category for many customers as standalone products. The complexity makes them important source for use in the cocktail serve.

Top Brands ranked by Sales Volume (Hl)				
Dark Spirits	Brands	Rank This Year	Rank Last Year	Movement
Golden/Dark Rum	Captain Morgan	1	1	0
Imported Whisky	Jack Daniel’s	2	2	0
Scotch	Famous Grouse	3	3	0
Scotch	Bell’s	4	4	0
Brandy	Courvoisier	5	5	0
Golden/Dark Rum	Bacardi	These Brands 6-15 are shown in ALPHABETICAL order		
Golden/Dark Rum	Havana			
Brandy	Hennessy			
Imported Whisky	Jameson			
Scotch	Johnnie Walker			
Brandy	Jules Clairon			
Golden/Dark Rum	Kraken			
Brandy	Martell			
Brandy	Remy Martin			
Scotch	Whyte & Mackay			

7. White Spirits

In contrast to Dark Spirits performance trends, That result though has not undermined the scale of White Spirits within Clubland and **it still accounts for 7.9% of all sales.**

The top brands retained their relative positions compared to the previous year. There were a couple of new entrants seen. A long established brand, Stolichnaya returned to the Top 15 and a relatively new brand Au Vodka entered the rankings.

Top Brands ranked by Sales Volume (Hl)				
White Spirits	Brands	Rank TY	Rank LY	Movement
Vodka	Smirnoff	1	1	0
Gin	Gordon's	2	2	0
White Rum	Bacardi	3	3	0
Vodka	Absolut	4	4	0
Gin	Whitley Neill	5	5	0
Vodka	Au Vodka	These Brands 6-15 are shown in ALPHABETICAL order		
Gin	Beefeater			
Gin	Bombay Sapphire			
Vodka	Chekov Imperial			
Vodka	Glens			
Vodka	Grey Goose			
Tequila	Jose Cuervo			
Vodka	Stolichnaya			
Gin	Tanqueray			
Vodka	Zamoyski			

8. Wines (Table & Sparkling)

Wines across the category tend to rely more on region and grape varietal, colour and country of origin but the brand is becoming more widespread. Wines do trade mostly on their vineyard, but nonetheless brands have developed in the category. The Wine category had suffered larger volume decline than many other drinks categories, but in the last year across **Clubland sales revenue was marginally higher by 0.9%.**

In brand terms Jack Rabbit retains its top spot. Similarly the other four brands Pier 42, Blossom Hill. Oliver & Greg's and One 4 One finished the year in an unchanged positional order. Vino Spumante Prosecco overtook Ponte in the Sparkling Wines and Champagnes category and was the sole positional change in the Top 5.

Top Brands ranked by Sales Volume (Hl)				
Wines	Brands	Rank This Year	Rank Last Year	Movement
Champagne & Sparkling	Vino Spumante Prosecco	1	2	1
Champagne & Sparkling	Ponte	2	1	-1
Champagne & Sparkling	Codorniu	3	3	0
Champagne & Sparkling	Bottega	4	4	0
Champagne & Sparkling	One 4 One	5	5	0
Champagne & Sparkling	Di Maria Prosecco	These Brands are shown in ALPHABETICAL order		
Champagne & Sparkling	Follador			
Champagne & Sparkling	Freixenet			

Top Brands ranked by Sales Volume (Hl)				
Wines	Brands	Rank This Year	Rank Last Year	Movement
Still Wine	Jack Rabbit	1	1	0
Still Wine	Pier 42	2	2	0
Still Wine	Blossom Hill	3	3	0
Still Wine	Oliver & Greg's	4	4	0
Still Wine	One 4 One	5	5	0
Still Wine	Barefoot	These Brands 6-15 are shown in ALPHABETICAL order		
Still Wine	Giotto			
Still Wine	Hardy's Private Bin			
Still Wine	Healy and Gray Zinfandel Rose			
Still Wine	Hidden Road			
Still Wine	I Heart			
Still Wine	Invenio			
Still Wine	Nobilo Southern Rivers			
Still Wine	Scruffy Dog			
Still Wine	Stowell's			

9. Liqueurs

The resilient volume and strong sales value growth of 2024 for this category in Clubland was improved upon in 2025. Whilst still being the 8th category in terms of value, the gap to Wine closed. **The category accounts for 5.5% of Clubland revenue this year, up from 4.9%.**

The brands in this collective of spirits styles are featured highly in the cocktail and shooters consumer usage. So its continued growth will be supported by this phenomenon as has been the case across all spirits.

The five leading brands remain as they were last year, with Tequila Rose and Baileys swapping. Antica and Sourz keep their respective positions, as did Jägermeister.

Top Brands ranked by Sales Volume (Hl)				
Liqueurs	Brands	Rank TY	Rank LY	Movement
Non Cream Liqueurs & Specialities	Antica	1	1	0
Non Cream Liqueurs & Specialities	Sourz	2	2	0
Cream Liqueurs	Tequila Rose	3	4	1
Cream Liqueurs	Baileys	4	3	-1
Non Cream Liqueurs & Specialities	Jagermeister	5	5	0
Non Cream Liqueurs & Specialities	Amaretto Disaronno	These Brands 6-15 are shown in ALPHABETICAL order		
Non Cream Liqueurs & Specialities	Aperol			
Non Cream Liqueurs & Specialities	Archers			
Non Cream Liqueurs & Specialities	Jack Daniel's			
Non Cream Liqueurs & Specialities	Kahlua			
Non Cream Liqueurs & Specialities	Luxardo			
Non Cream Liqueurs & Specialities	Malibu			
Non Cream Liqueurs & Specialities	Pimm's			
Non Cream Liqueurs & Specialities	Southern Comfort			
Non Cream Liqueurs & Specialities	Tia Maria			

10. Fortified

A category that is oft overlooked, however one that is very distinctive. A possible home of a new trend opportunity, following on from revivals in RTDs and Dark Spirits perhaps?

The resurgence did not happen last year, but the brands are all well known and established the oldest from 1692, so there is patience and persistence.

Top Brands ranked by Sales Volume (Hl)				
Fortified	Brands	Rank This Year	Rank Last Year	Movement
Vermouth	Martini	1	1	0
Fortified - Port	Cockburn's	2	2	0
Fortified - Sherry	Harvey's	3	3	0
Vermouth	Cinzano	4	4	0
Fortified - Port	Taylor's	5	5	0
Fortified - Ginger Wine	Crabbie's	These Brands 6-15 are shown in ALPHABETICAL order		
Fortified - Port	Croft			
Fortified - Port	Dows			
Fortified - Port	Graham's			
Vermouth	Noilly Prat			
Fortified - Sherry	QC Cream			
Fortified - Port	ROC			
Fortified - Ginger Wine	Stone's Original			
Fortified	Tio Pepe			
Fortified	Yates's Original Australian			

***Source:** OPM (On Premise Measurement); Channel: Sports & Social Clubs; Report based on 2025 P5 17-May-2025*