



Trading Insight

January 2026

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DRY? HARDLY.

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From niche to normal...

How students are changing their drink

Powered by health goals, social acceptance, and increasing alcohol-free options, young people are changing the way they drink. From lunchtime 'bookending' to Saturday night 'zebra-striping', moderation has moved from niche to normal.

"The growth of the alcohol-free category is clear. To give an example closer to home, the IWSR predicts that alcohol-free is set to become the second largest overall beer category by volume worldwide, behind lager." - Luke Boase, Lucky Saint

ABSTINENCE OR INTENTION?

UK alcohol consumption is trending down - not just in frequency but in volume. 4.1M fewer adults now drink weekly compared to 2021, and the proportion consuming 15+ units per week has fallen by 8% over five years. 18-24 year-olds are consuming alcohol the least frequently, with 86% saying they're 'actively moderating' their alcohol intake. This isn't abstinence; it's intentional. People aren't ditching nights out; they're curating them. Health is the leading driver. 82% cite better overall wellbeing with many using devices to track sleep, recovery, and energy – tech that makes moderation feel smart.

MODERATION IS NOW THE NORM

Three in four UK adults (76%) say they're actively moderating - especially under-35s. And they're doing it in ways that fit in with real life such as zebra-striping (alternating alcoholic and alcohol-free) and bookending (starting or ending an occasion with a no or low alcohol drink). Obviously alcohol is still widely consumed, but the 'mindful drinking' trend is becoming a long-term cultural shift, and venues that support more flexible drinking behaviours will be best positioned to stay relevant.

A SOCIAL ENABLER...

Over half of consumers say they enjoy nights out just as much when low & no is in the mix; many stay out longer, drink more overall (across alcoholic and non-alcoholic), and feel more in control. 43% are likelier to "indulge" on food or dessert when not drinking alcohol - creating upsell opportunities.

Drinking habits

Lunchtime and early evening are prime slots for 'bookending' and mindful pacing. For venues, this means fresh energy in usually quieter periods and longer dwell times without compromising the occasion.

According to [KAM research](#), the category is evolving fast with 37% of adults saying they've left a venue early or felt disappointed by poor low & no options.

And consumers aren't just looking for no & low drinks - they're looking for experiences: authentic zero-proof serves, stylish presentation and more choice.

When people aren't drinking alcohol, low & no beer is the second-most chosen category - leapfrogging traditional softs. 24% of consumers still default to tap water so having a good range of no & low alternatives can convert those "water moments" into profitable ones.

WHAT TO DO NEXT

- Treat low & no as core by integrating into main menus and offering choice across beer, wine, cocktails, and RTDs.
- Put it on draught. One quality alcohol-free tap draws attention where consumers are already looking.
- Design photogenic serves. Glassware, garnish, and flavour will elevate no & low serves from compromise to desire. Train staff to recommend and pair, just as with premium cocktails.
- Promote "low & no hour." Target lunch, early evening, and midweek with bookending and zebra-stripping prompts; bundle with food to grow dwell time and margin.
- Add health transparency. Simple cues - calories, sugar, key ingredients - build trust among the 65% who read health info when choosing alcohol-free.

Moderation is now mainstream, and low & no is no longer just a box to tick - it's an opportunity. Make it visible. Make it desirable. Make it easy.





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*CGA & Nielson Volume/Value Share June 2025.

For support, contact:

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 **People**

 **Planet**



Our coffee tastes better, because it's changing lives.

Paddy & Scott's is not just another coffee company. We know that a simple cup of coffee can make a tangible difference, by empowering communities all around the world. We pay real prices for our coffee, ensuring that farmers are rewarded for their hard work and can break away from parasitic supply chains.

Going beyond sustainability and demanding regeneration to minimise our global impact.

Paddy & Scott's represents the power that a simple choice can have on creating a better world through something as small as a cup of coffee.



School meals funded by Lunch Box so far:

8 4 1 0 0 0

Lunch box coffee provides school meals for children in coffee growing regions, so they can focus on studying and not where their next meal will come from.



Paddy & Scott's

Learn more about how we fuel ambition:



Innovation Days



REGISTER HERE

In 2025, the NUS Services Board approved the new Trading Support Strategy, developed in collaboration with students' unions and suppliers. One exciting new feature of the Innovation strand is the launch of annual Innovation Days for licensed trade, catering and retail.

Each event brings together 25 – 30 suppliers, all ready to showcase fresh, innovative ideas designed to elevate enterprise across the sector. It's a great opportunity to connect with brands you may not usually see at Trade Convention, discover new opportunities, and spend time with fellow SU commercial colleagues in a relaxed, collaborative setting.

The events are completely free to attend, and you're welcome to join us for one, two, or all three - perfect if your interests span multiple areas of commercial operations.

We look forward to seeing you!

25 February: Retail Innovation Day at Leeds University Union

4 March: Catering Innovation Day at Nottingham Trent SU

11 March: Licensed Innovation Day at Nottingham Trent SU



ALCOHOL DUTY INCREASES

From 1 February 2026, alcohol duty rates will be uprated in line with the Retail Price Index (RPI). This government-mandated change will impact all categories of alcoholic products, and our suppliers are within their rights to adjust prices accordingly to reflect these increases.

Many of our suppliers are committed to keeping costs as low as possible for members but any price adjustments will be reflected on Trading Directory on 1 February.

We've received notification from LWC on all their lines but have only had a few increases from brand owners for spirits lines. Brand owners must supply the duty related price increase to us via an ITQ

sheet, if they do not, BOPA (where applicable) will increase.

We accept all price increases directly related to changes in UK duty or tax and would recommend purchasing consortium members, check Trading Directory and adjust prices to reflect any increases.

If you have any questions or concerns, please [get in touch](#).



Bold. New. Cherry.

This is my taste



New!

NEW

VIKING BERRY™



IF YOU LIKE A LOT OF C ON YOUR BISCUIT...BE PAY FOR IT

Sweet tooth? Bitter news. Britain's chocolate lovers are feeling the crunch - not just in their bars, but in their wallets.

Prices for chocolate have soared by 17.5% in the year to October 2025, according to the Office for National Statistics. That's more than triple the average food inflation of 4.2% (November 25)! In fact, chocolate is now the second biggest climber in the grocery aisle, just behind beef and veal.

SO WHY THE MELTDOWN?

It's a cocktail of poor cocoa harvests due to climate and crop disease, global supply shortages, milk price increases, rising production costs, and our favourite party pooper: inflation. The result? Bars are shrinking, recipes being reformulated, or manufacturers are quietly swapping ingredients for cheaper options like palm oil and shea butter.

When processed, a cocoa bean becomes cocoa liquor - half cocoa solids, half cocoa butter. UK law says milk chocolate must contain around 20% cocoa solids (slightly lower than the EU's 25%). But to keep prices palatable, some manufacturers are cutting cocoa content and bulking up with alternatives.

Pladis, the maker of Penguin and Club have dropped the word "chocolate" from its bars and now refer to them as 'chocolate flavour' in an effort to control costs.

WHAT TO EXPECT

'Shrinkflation'

Lots of manufacturers are reducing the size of their products but not reducing the price – in fact, many of them have increased the price! Easter eggs already out on the shelves are a clear example with many brands reducing the size of the egg or its contents but increasing the price.

Value vs Premium

Mainstream brands will compromise while artisan makers will pass on costs to maintain quality.

'Skimpflation'

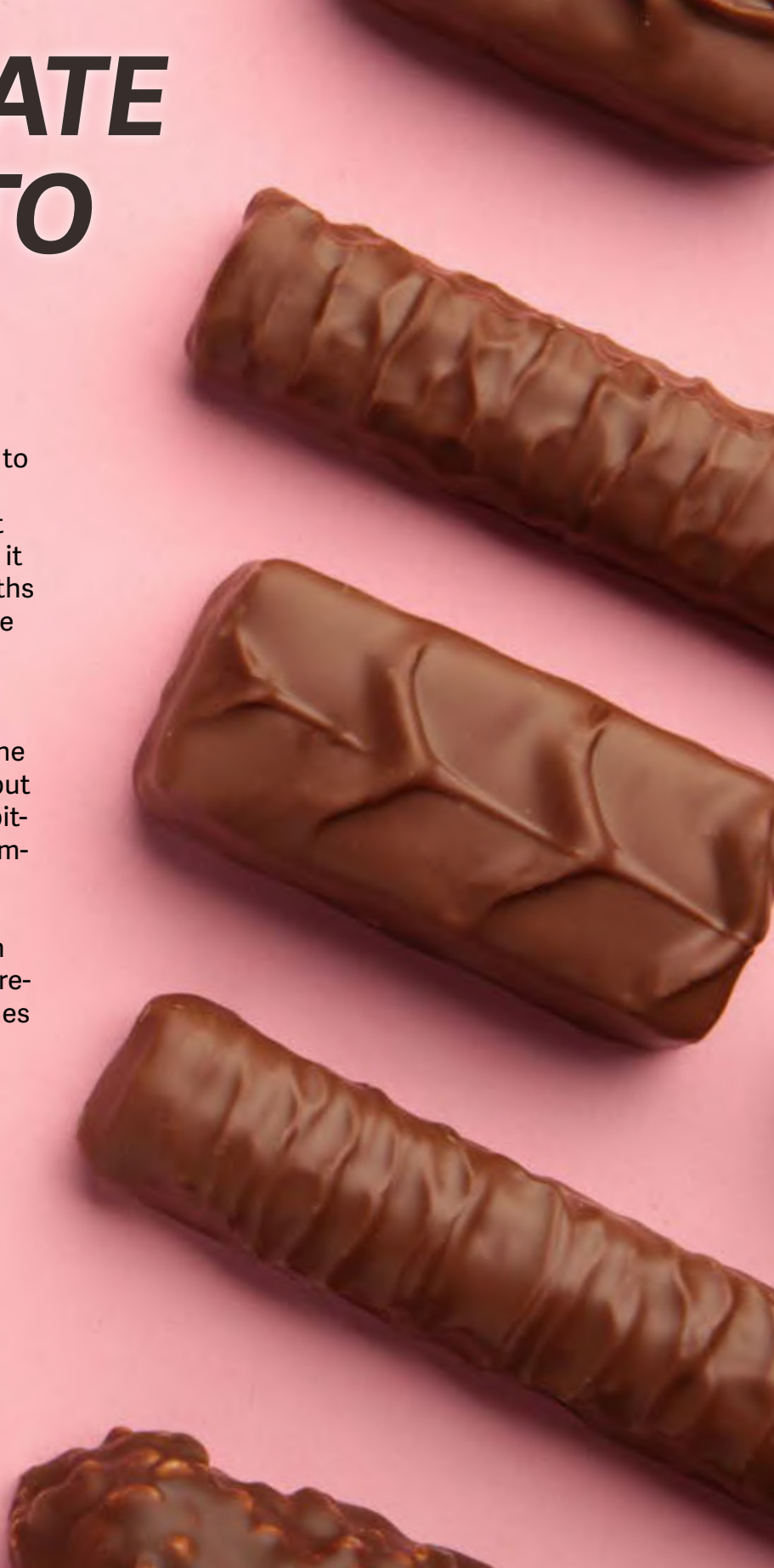
Replacing costly ingredients, such as cocoa, with cheaper ones.

CHOCOLATE READY TO

And don't expect prices to snap back to 2022 levels anytime soon. Whilst cocoa costs have fallen, it will take around 18 months before consumers notice the price difference on shop shelves.

Chocolate may still be the ultimate comfort food, but right now, it's leaving a bitter taste for both consumers and manufacturers.

...So next time you reach for that indulgent treat, remember; every bite comes at a premium!



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innocent apple juice
innocent apple and mango juice
innocent apple and raspberry juice
innocent orange juice bits

Size

8x330ml
8x330ml
8x330ml
8x330ml
8x330ml

Code

211287
250970
261316
261315
211286

on
promo



Why buying compliantly matters

In today's competitive market, every purchase we make tells a story - about our values, our priorities, and our commitment to doing things right. When we choose to buy through the purchasing consortium, we're not just ticking a compliance box; we're strengthening our collective power, protecting our reputation, and driving meaningful change.

But what happens when we don't buy compliantly? The impact is bigger than you may realise – and it affects us all.

THE HIDDEN COSTS OF GOING ROGUE

Financial

When purchases bypass approved frameworks, costs creep up. Competitive pricing erodes, and the financial benefits of collective buying are hindered. Every non-compliant transaction chips away at the shared returns that help fund our future.

Environmental

Sustainability isn't a solo effort - it's a shared responsibility. Non-compliant buying means losing sight of supply chain standards and missing out on joint projects that amplify our environmental impact. Without alignment, our ability to drive change weakens.



Legal & Governance

Compliance protects us. When we stray, we dilute negotiating power, expose ourselves to fines, and risk damaging our reputation. In a highly competitive market, non-compliance also reduces our ability to adapt quickly to change.

Supplier relations

Fragmented buying undermines both supplier relationships and buying power. It also limits our access to new markets.

HOW TO STAY ON TRACK

Compliance isn't complicated - it's about consistency. Here's how you can make sure every purchase has a positive impact:

- * Use the consortium's approved frameworks, suppliers, and product list.
- * Keep internal policies clear and mandate consortium usage.
- * Educate your teams on compliant routes.
- * Monitor spend and report compliance regularly.
- * Look out for payment changes and flag anomalies.
- * Check in with the Commercial Development Team for support.
- * Respond to feedback requests to help us improve the support we offer.

The bottom line...

Buying compliantly isn't just good practice - it's good business. It protects our finances, strengthens our reputation, and amplifies our impact. Every compliant purchase is a step toward a stronger, more sustainable future for the movement.





**YOUR GUT'S NEW
FAVOURITE DRINKS.**

New Year, new gut. Stock up now!

FOR EVERY COURSE

GIVE THEM THE TOOLS TO SUCCEED



GET CREATIVE

**THE WORLD IS YOUR
CANVAS WITH POSCA**



STUDENT SAMPLING

Last year, our NPD sampling SUs asked students what they thought about White Claw Hard Seltzer and Desperados Cocktails. Here's what they had to say...





Have you seen or tried Desperados Cocktails?

14% had tried, 28.6% had heard of them but never tried, and 57.1% had never seen them.

Taste rating (1 = poor and 5 = excellent)

Tropical Daiquiri

42.9% rated the taste a 3

50% rated the taste 4 - 5

"When asked if they would try it again about 6 said yes with confidence, and the rest were unsure and stated it wouldn't be their first choice but that they did like it".

Mojito

50% rated the taste a 3

42% rated the taste a 4

"A nice balance of beer and subtle minty mojito flavour."

Red Caipirinha

21.4% rated the taste a 3

57.2% rated the taste 4 - 5

Which flavour did you enjoy the most?

42.9% voted Mojito their favourite. 35.7% said Red Caipirinha came second at 35.7% then Tropical Daiquiri came last with 21.4%.

The majority of students said they would pay around £3 for a can and **pre-drinks** (64.3%) and **festivals** (57.1%) came top of the list of occasions where they could see themselves drinking the product.



WHITE CLAW®

The majority of students liked the overall look of the brand (over 76%) with words like fun, clean, unique and appealing being used.

Flavour rating (1 = not so great and 5 = amazing)

Black Cherry

20.5% gave it 3
56.4% gave it a 4 or 5

Natural Lime

18.9% gave it 3
59.4% gave it 4 or 5

Mango

37.8% gave it 3
48.6% gave it 4 or 5

Raspberry

18.4% gave it 3
65.8% gave it 4 or 5

Green Apple

16.7% gave it 3
44.5% gave it 4 or 5

"Refreshing and tasted natural, the sweetness was perfectly balanced".

"Tasted fresh, reminiscent of lime soda".

"Very light and simple making it feel refreshing".

When asked if they would buy the product, **52.6%** said yes, **28.9%** weren't sure and **18.4%** said no.

When asked how much they would be happy to pay in their SU bar, student responses ranged between £1 and £5.

Reasons to choose this over their usual go-to...

Lots of students hadn't tried hard seltzer before but said they liked that it wasn't as heavy as beer and they would be ideal for pre-drinks on a night out.

"The smarter choice as they "didn't enjoy getting that drunk" and "it would help pace a bit more while still having fun."





APPLES, REFRESHED

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TikTok and
Instagram

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want iced
and flavoured
drinks all
year



REÀL flavours are a matcha and coffee lovers' dream

Matcha demand is **RIISING FAST** if
it's not on your menu yet, you're
missing daily sales*

Expand your coffee menus without
adding labour or barista skills

SUGGESTED SERVE

ICED STRAWBERRY MATCHA

35ml of REÀL Strawberry Purée
100ml milk (dairy or plant-based)
200ml Hot Water
1 Tsp Ceremonial or barista-grade matcha
50ml water (hot, not boiling)

Add REÀL Strawberry Purée to the bottom of a glass. Fill the
glass with ice and pour over cold milk. Whisk matcha with hot
water until smooth and frothy. Slowly pour matcha over the
milk for a beautiful layered effect.

Despite higher costs of living
consumers will still indulge in
drinks that offer added value**

SUGGESTED SERVE

HAZELNUT CAPPUCCINO

15ml REÀL Hazelnut
1 Espresso
Frothed milk to fill

Pour 15ml REÀL Hazelnut into the cup and then
add 1 espresso, top with the frothed milk.

For more information please contact:
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*UK Matcha team market size & outlook 2030. ** TREATT 2024.

CLEAN UP LIKE THE DIRTY DUCK



SAVE ^{UP TO} 75% ON YOUR BEER LINE CLEANING



OUR UNIQUE, SUSTAINABLE ALTERNATIVE FOR BEER LINE CLEANING REDUCES CLEANS BY 75% - FROM 52 TO JUST 13 PER YEAR

Save waste beer, time & water

After installing System28 in its Dirty Duck pub, the University of Warwick Students Union year 1 savings, including all costs, are over **£10,000**.

Now, all four of their venues are enjoying the benefits of System28.

System28 pairs EcoZenze Activ - our unique, eco beer line cleaner, with our electronic yeast growth inhibitor. It saves



money and improves yields through extending time between cleans from the usual 7-day cycle to 28 days.

**Scan the QR link to
find out the savings you
could make using our
System28 savings calculator.**

Better quality, more safety

The beer line cleaner provides a highly effective clean in 30 minutes AND is safe to leave in lines longer for a deep soak clean, even overnight, so no need for end-of-service cleans. Its neutral pH and single-use packs are much safer for staff to handle and with no harsh chemicals it's better for health and safety generally, too.

Real environmental benefits

As well as reducing water used by 75% and lowering transport emissions, it's free from:

- Sodium hydroxide (caustic soda)
- Sodium hypochlorite (bleach)
- Phosphate

And, waste is biodegradable and harmless to aquatic life - even more good news for ducks, dirty or otherwise.



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national union of **students**

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SIMPLER RECYCLING

What you need to know about the new v

The UK government is introducing a major reform to waste and recycling services across England, designed to simplify processes and boost recycling rates. Under the new default requirements, most households and workplaces will be expected to use four separate containers for:

- Residual waste (non-recyclable)
- Food waste (combined with garden waste where appropriate)
- Paper and card
- All other dry recyclables (plastic, metal, and glass)

These containers may vary in type (bags, bins, or stackable boxes) depending on local arrangements. Local authorities and waste collection services will retain flexibility to adapt solutions to meet local needs.

Why This Matters to Students' Unions

For businesses, this reform means greater clarity and consistency. No more confusion over what can be recycled in different regions - the same materials will be accepted everywhere, whether at home or work. This universal standard will end the so-called "postcode lottery" of recycling collections and make compliance easier for businesses operating across multiple locations.

Benefits of Simpler Recycling

Nationwide consistency: Businesses can implement uniform recycling policies across all sites in England.

Improved sustainability: By capturing more recyclable materials, companies can reduce their environmental footprint.

Support for net zero goals: These changes contribute to significant emissions savings in the waste sector, aligning with corporate ESG commitments.

Investment opportunities: The policy is expected to drive over £10 billion in UK recycling infrastructure investment over the next decade.

waste collection standards

The Circular Economy Strategy

Simpler Recycling is part of a broader government push towards a zero-waste, circular economy, alongside initiatives like Extended Producer Responsibility (EPR) for packaging and the Deposit Return Scheme for drinks containers. Together, these reforms aim to:

- * Keep resources in use longer
- * Accelerate progress towards net zero
- * Create green jobs and stimulate economic growth
- * Enhance domestic recycling capacity for high-quality materials

The ultimate goal? To achieve a 65% recycling rate for municipal waste by 2035, while delivering greenhouse gas emissions savings equivalent to £11.8 billion.

What You Can Do Now

Review waste management policies: Ensure you're prepared for the new container requirements.

Engage with Local Authorities: Understand how these changes will be implemented in your area.

Communicate: Ensure employees know about the new system to ensure compliance and maximize recycling.

Plan for infrastructure: Consider space and logistics for additional containers at your sites.

Simpler Recycling is a pragmatic, future-focused approach that will make recycling easier, reduce confusion, and help businesses play a vital role in building a sustainable, circular economy.



SIMPLY

The Ultimate

PROFIT BOOSTING BEVERAGES!

Bubble tea is the new “hang-out” drink, and has become the beverage of choice for **experience-seeking younger consumers**. SIMPLY Coolers and Popping Boba are the perfect quick-serve combo, making it easy to make tasty, trendy beverages with minimal ingredients, ideal for serving the crowds.



BOBAMAN870G
Simply Mango
Popping Boba 870g

IBCCOOTROPICAL
Simply Tropical Cooler 1l

IBCCOOMANDRAG
Simply Dragon Fruit &
Mango Cooler 1l

BOBASTRAW870G
Simply Strawberry
Popping Boba 870g



Tropical Cooler

with **MANGO POPPING BOBA**



RECIPE

Ingredients

- 4 pumps (30ml) Simply Tropical Cooler
- 270ml Water
- 60g Simply Mango Popping Boba
- Ice

Instructions

- 1 Add your tropical cooler syrup to a cup full of ice.
- 2 Top with water and stir.
- 3 Add a sieve of mango popping boba.
- 4 Garnish with fresh fruit and herbs if desired.



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