The Moderation Movement

How consumers across EMEA are reshaping their drinking habits

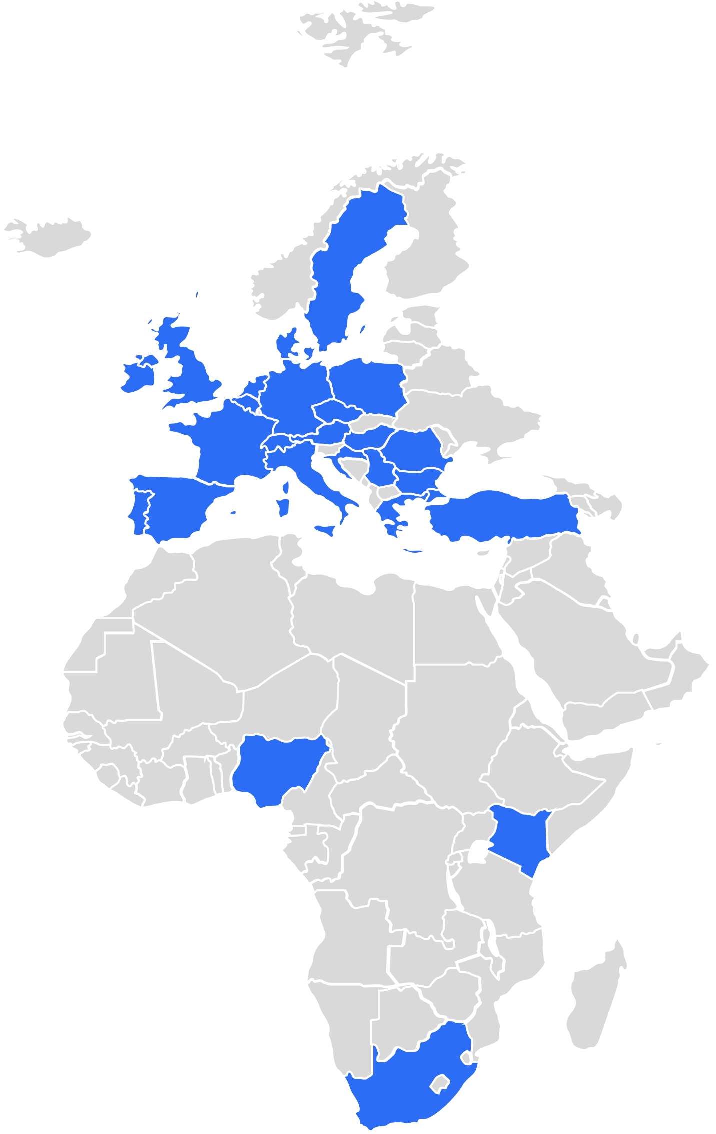
EMEA

2025

Table of Contents

EMEA Markets covered

- *Great Britain*
- *Ireland*
- *France*
- *Germany*
- *Italy*
- *Spain*
- *Netherlands*
- *Bulgaria*
- *Serbia*
- *Hungary*
- *Croatia*
- *Greece*
- *Romania*
- *Czech Republic*
- *Poland*
- *South Africa*
- *Kenya*
- *Nigeria*
- *Turkey*
- *Belgium*
- *Austria*
- *Switzerland*
- *Denmark*
- *Sweden*
- *Portugal*



Last Call?

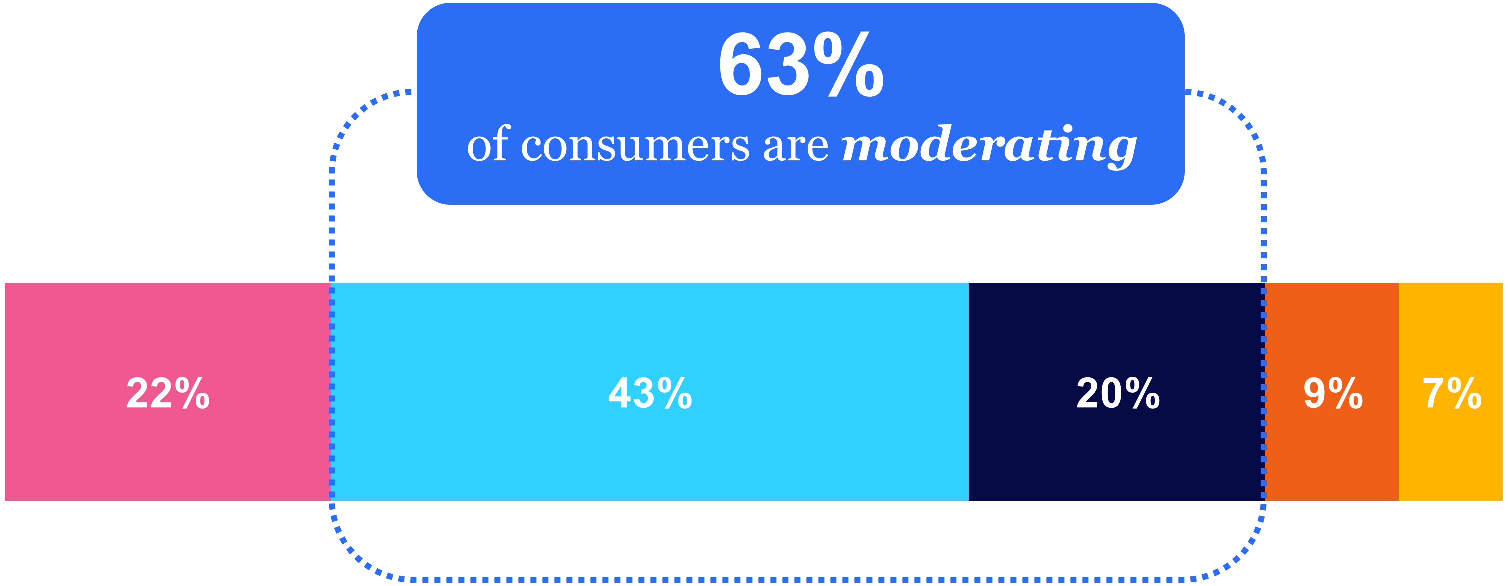
Consumers' evolving relationship with alcohol

NIQ

CGA Powered by NIQ

Consumers, globally, are moderating their *alcohol consumption*, creating challenges for suppliers who are competing in a declining space

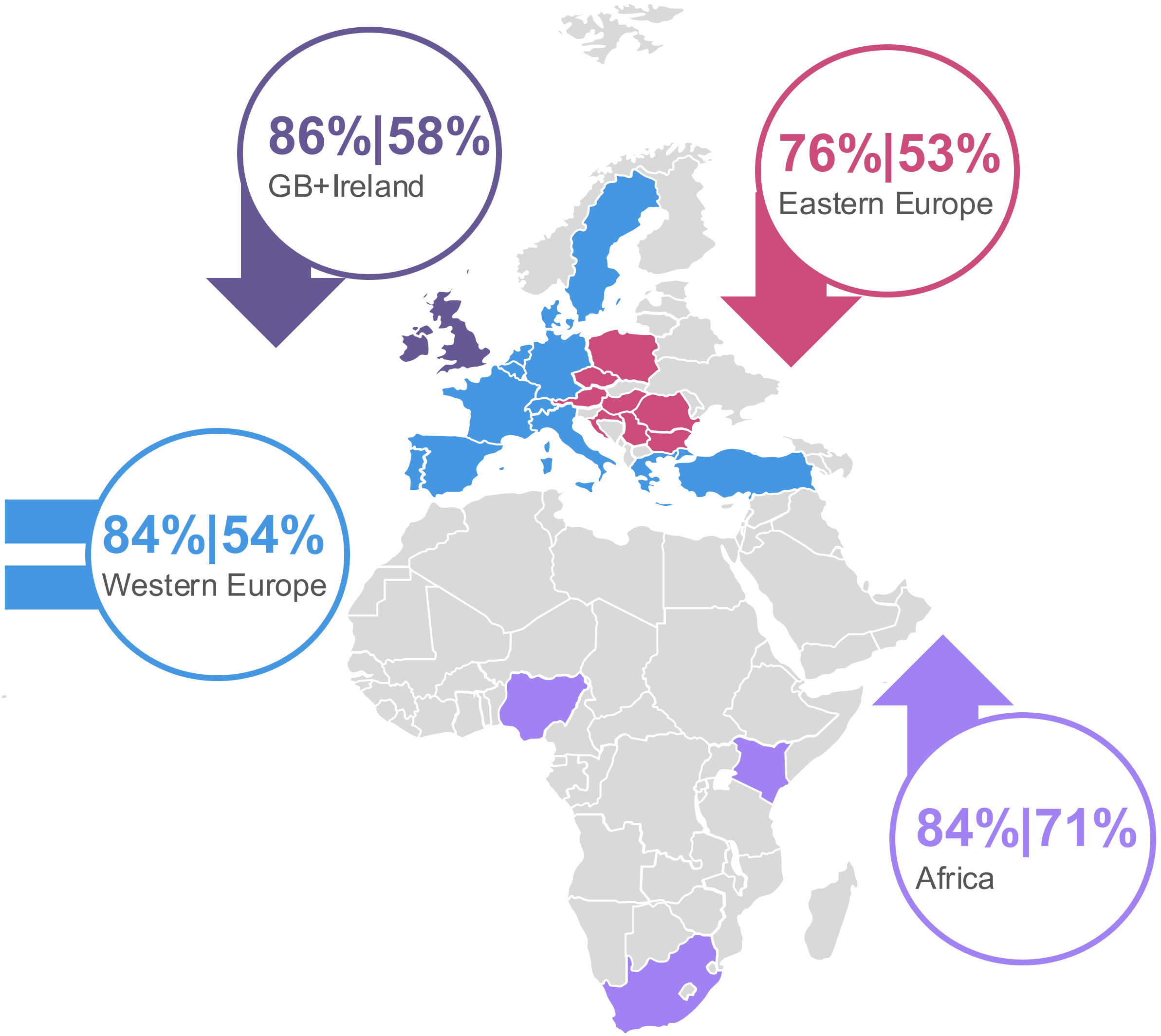
Which of the following statements best describes your relationship with alcohol currently?



- I enjoy drinking alcohol and see no reason to change
- I drink occasionally but am more mindful of my consumption now
- I used to drink regularly but now choose to drink less
- I no longer drink alcohol
- I never drank alcohol to begin with

Source: CGA REACH Global April - May 2025. Sample: 33,201

Visitation by region [Total Penetration] | Weekly visitors



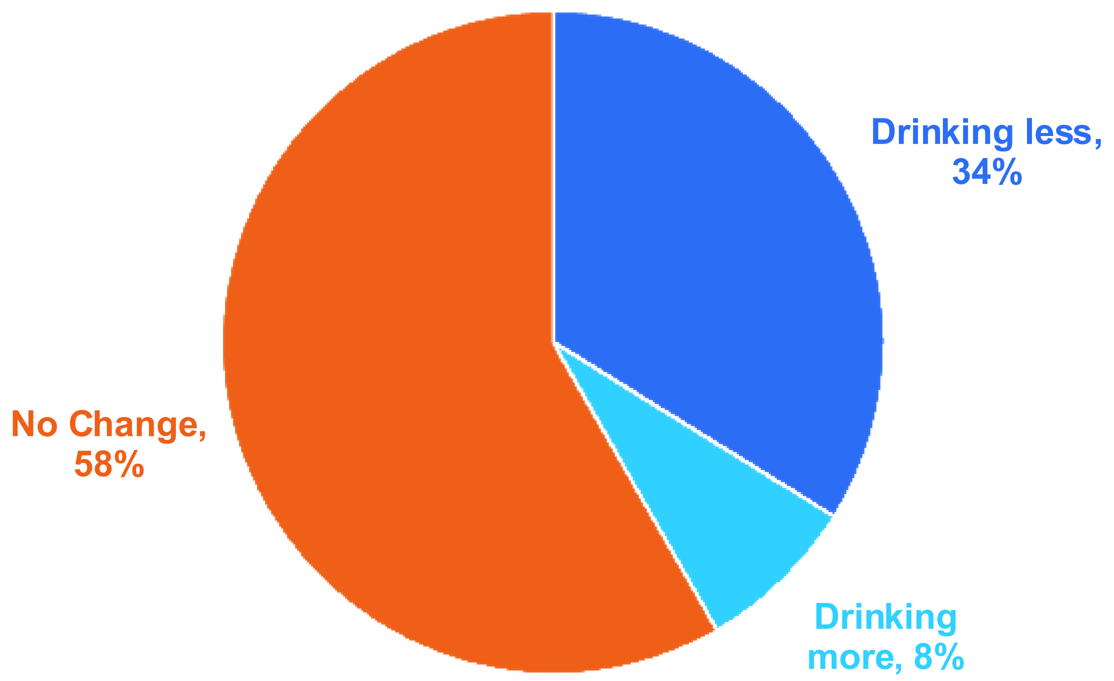
Consumers across EMEA are choosing to drink less alcohol than they were 12 months ago

Source: CGA REACH Global April - May 2025. Sample: 33,201
*arrows indicate % change vs. 1YA

With almost a third of EMEA consumers drinking less, moderation is no longer a niche trend.

What's driving consumers to rethink their relationship with alcohol?

Has your alcohol consumption changed when out at bars, restaurants or other similar venues compared to 12 months ago?



Source: CGA REACH EMEA : Sample: 14,281

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Why behind the Dry

Decoding the reasons behind moderation

NIQ

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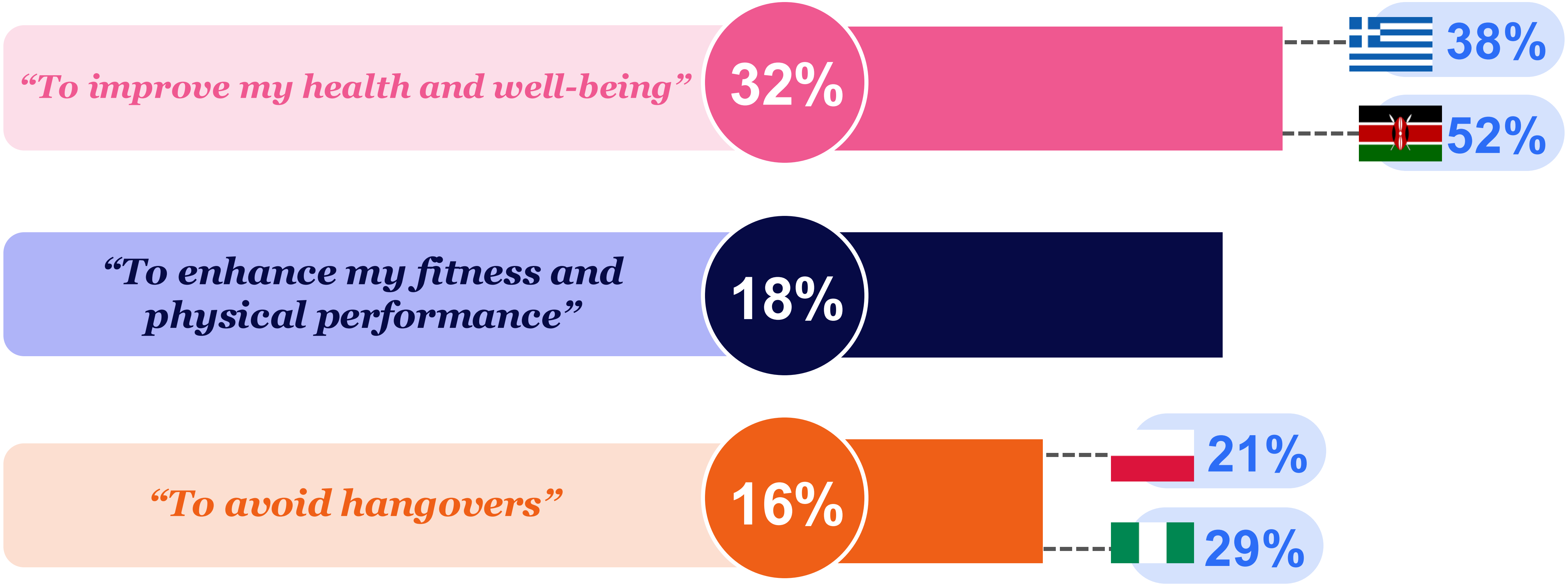
Why are consumers drinking less than they were a year ago?

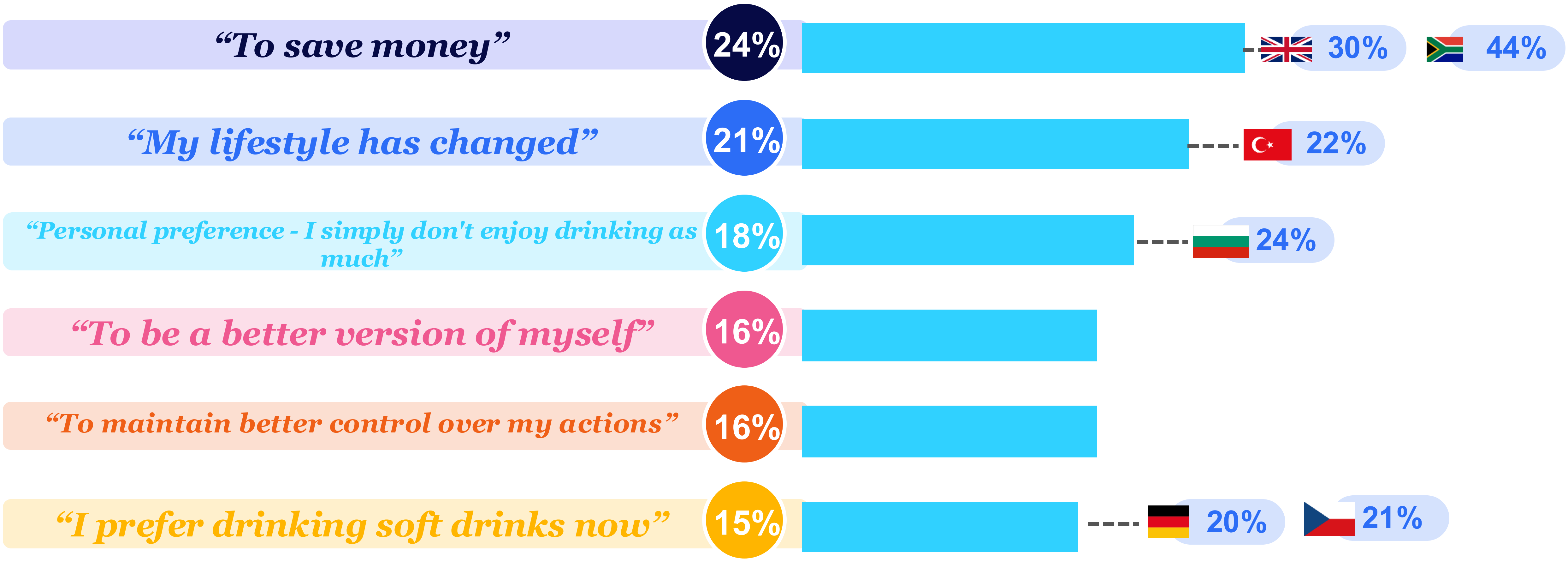
Health reasons



Source: CGA by NIQ REACH EMEA 2025 – Sample: 330 – 12,988

Why are consumers drinking less than they were a year ago?

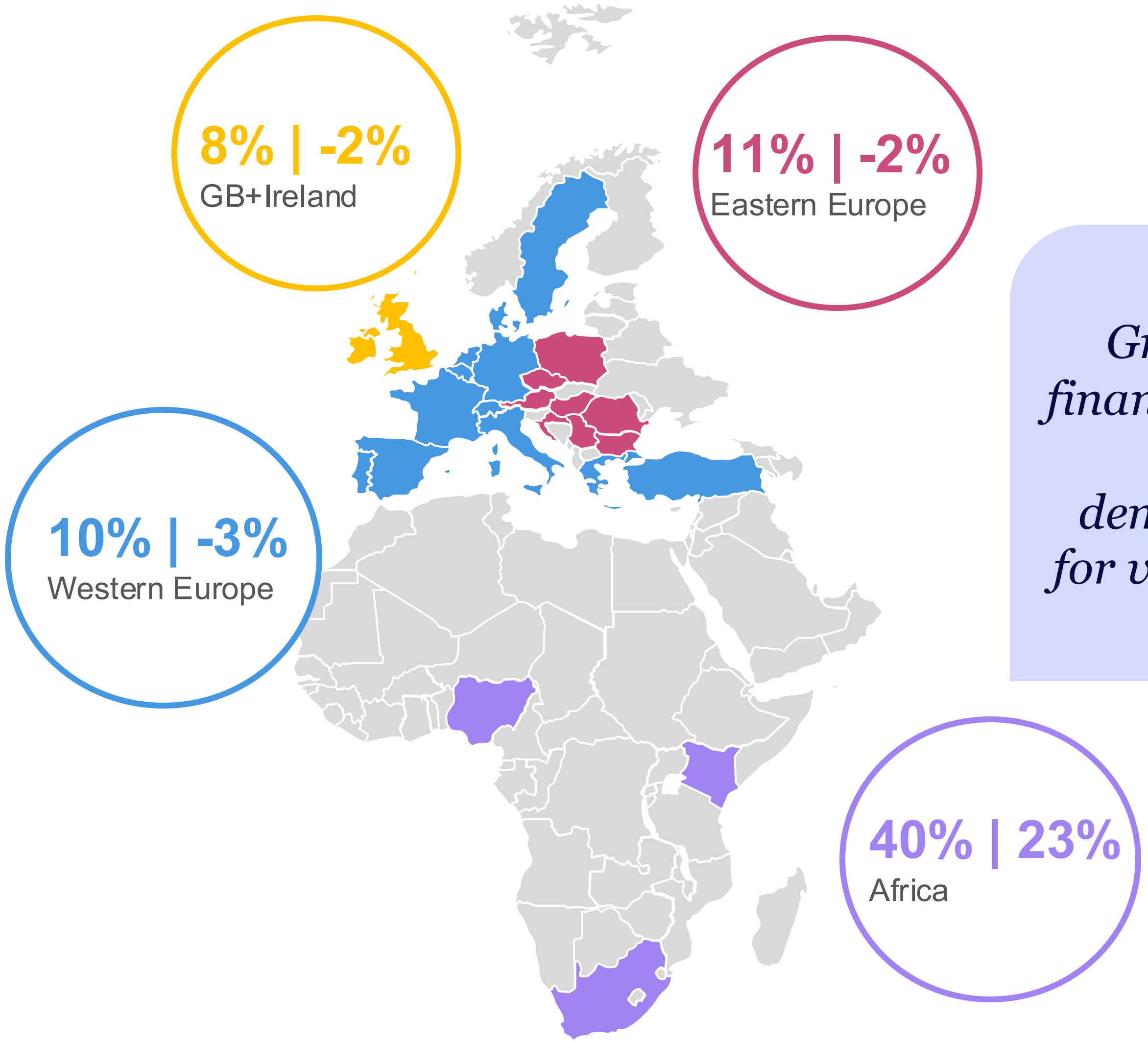
Cost of living/ Lifestyle changes



Source: CGA by NIQ REACH EMEA 2025 – Sample: 377 – 12,988

Net positivity for disposable income | Net expected change in frequency visiting the On Premise

Increasing concerns around financial conditions in developed markets like Western and Eastern Europe are highlighting the challenges for stagnant On-Premise performance.



Growing positivity around financial conditions in emerging markets like Africa are demonstrating the conditions for vibrant On-Premise growth.

Source: CGA REACH Global April - May 2025. Sample:1755 – 17,84233,201

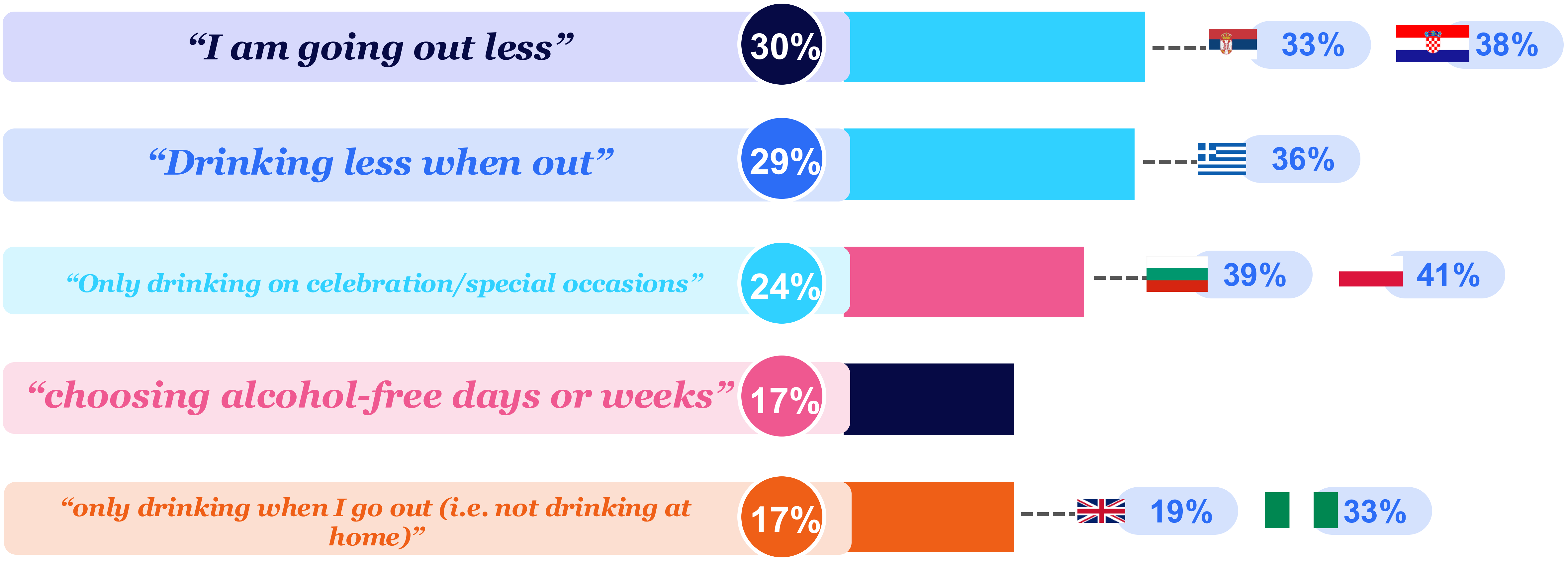
Rethinking the ritual

Is your brand keeping pace with the sober shift?

NIQ

CGA Powered by NIQ

Consumers across EMEA are actively moderating their alcohol intake, not just by what they drink, *but how, when, and why they drink.*



Source: CGA by NIQ REACH EMEA 2025 – Sample: 337 – 11,456

"

Moderation is changing the way people drink, and it's happening fast. Across EMEA, consumers are rethinking their choices, exploring new formats, and embracing no and low alcohol options. This isn't about one reason or one moment. It's about a shift in expectations.

For drinks brands, the challenge is clear. Those who respond with relevance, creativity, and intent will shape the future of the category.

George Argyropoulos

Managing Director, EMEA

Consumer identity is shifting, and their alcohol consumption habits are evolving with it.

Is your brand keeping up?

Is your brand innovating offerings for the new age mindful drinkers?

Drink brands must pivot toward health-conscious, functional, and low/no-alcohol offerings that reflect today's wellness-driven priorities

Is your brand adapting experience to new drink rituals and occasions?

Brands must reimagine on-premise activations and celebration moments to stay top-of-mind in this shifting landscape

Is your brand communicating creativity and purpose to meet new expectations?

In a market shaped by personal values and lifestyle shifts, success depends on authenticity and intentional storytelling, not just availability

Drinking Reimagined

The appeal of No/low alcohol category

NIQ

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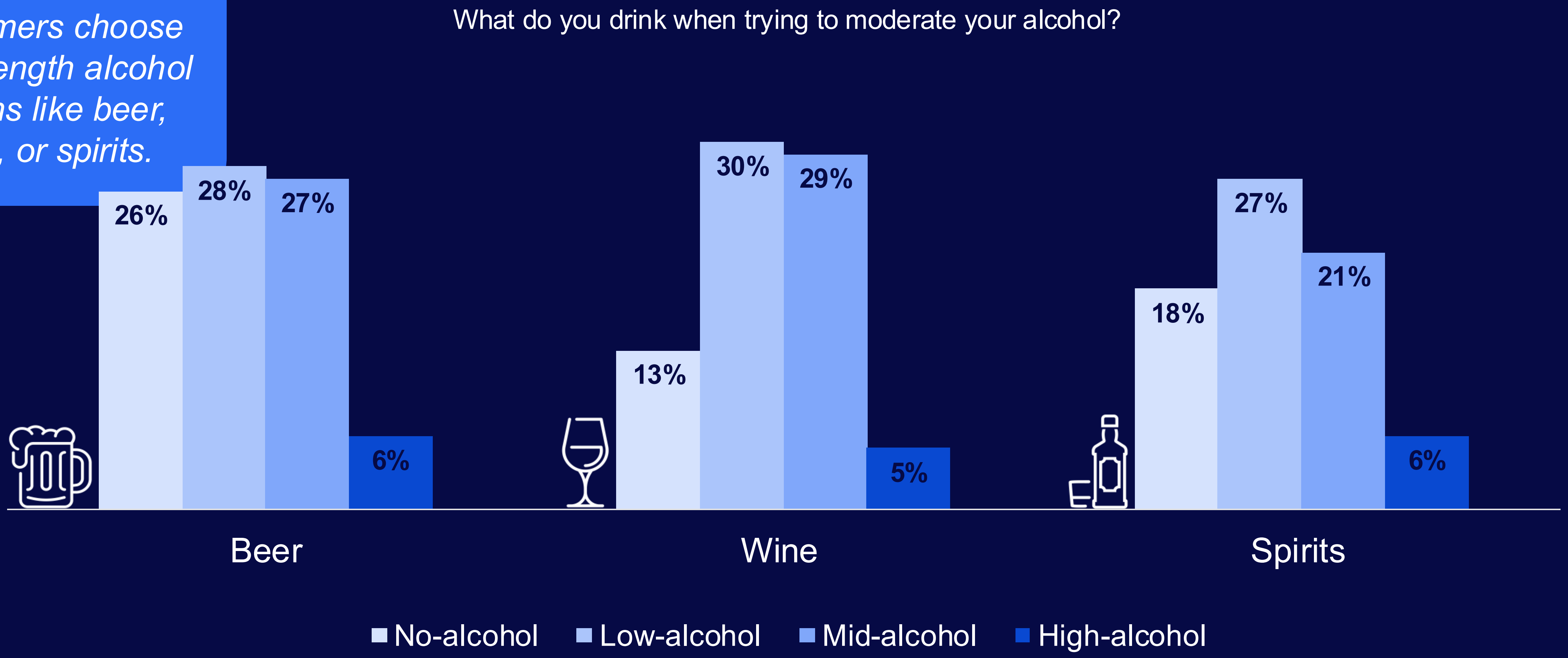
Moderation is not all about 0% – low and mid-strength alcohol is also performing very well, capitalising on consumers who still want to drink, but not go over the top

1 in 3
consumers choose low-strength alcohol options like beer, wine, or spirits.



Source: CGA REACH EMEA 2025 – Sample – 11,605.

Did you know…

Nearly **1 in 4**

EMEA consumers opt for non-alcoholic alternatives, including alcohol-free beer, wine, or spirits

?

Consumers are changing what they drink…

Are you changing what you serve?

Source: CGA REACH EMEA 2025 – Sample – 11,605.

Future Intentions: No/Low Alcohol Consumption Across EMEA

No/Low Alcohol consumption over next 12 month

56%
As frequently

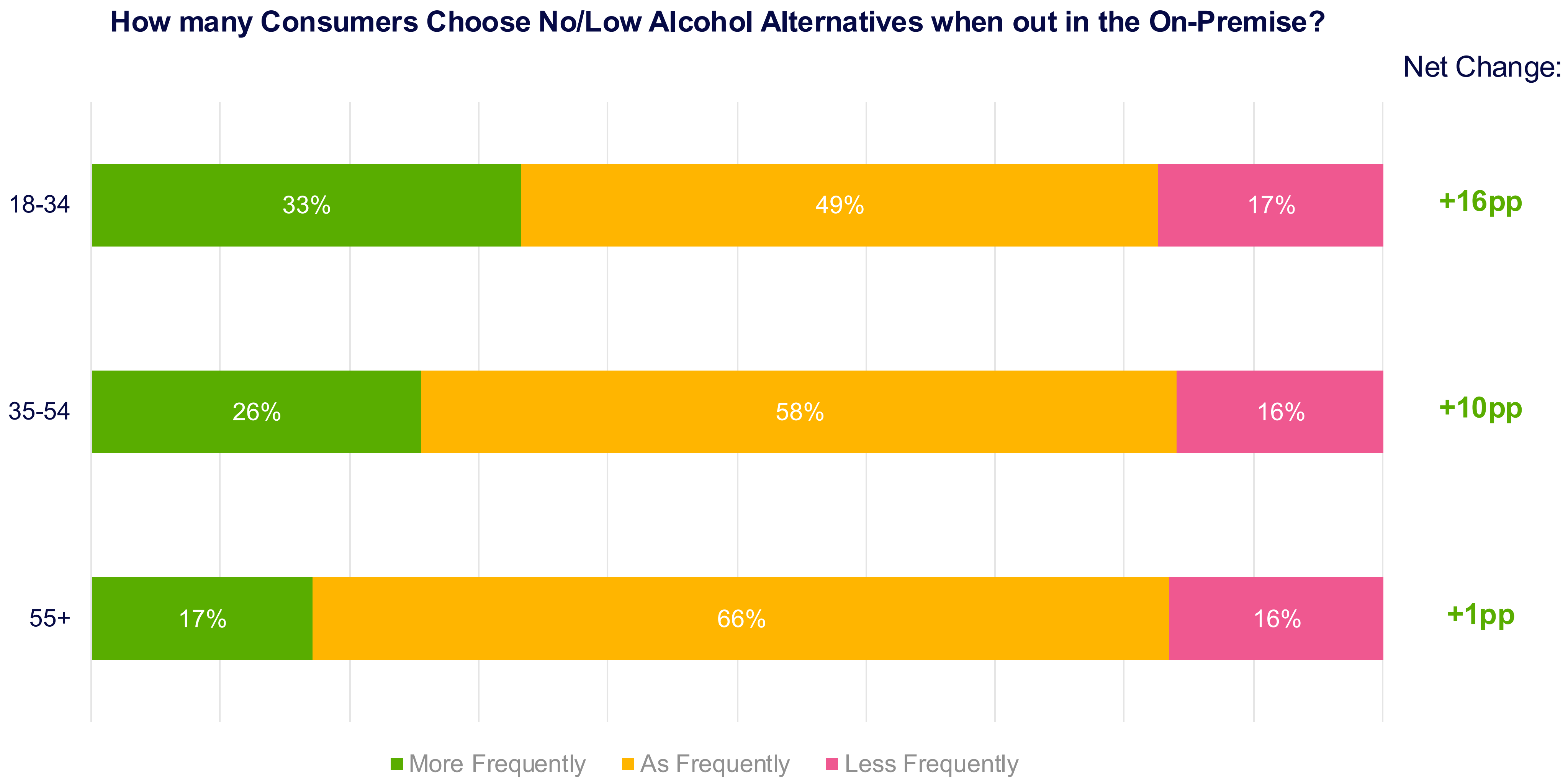
27%
More frequently

17%
Less frequently

Are you prepared for the next wave of moderation?

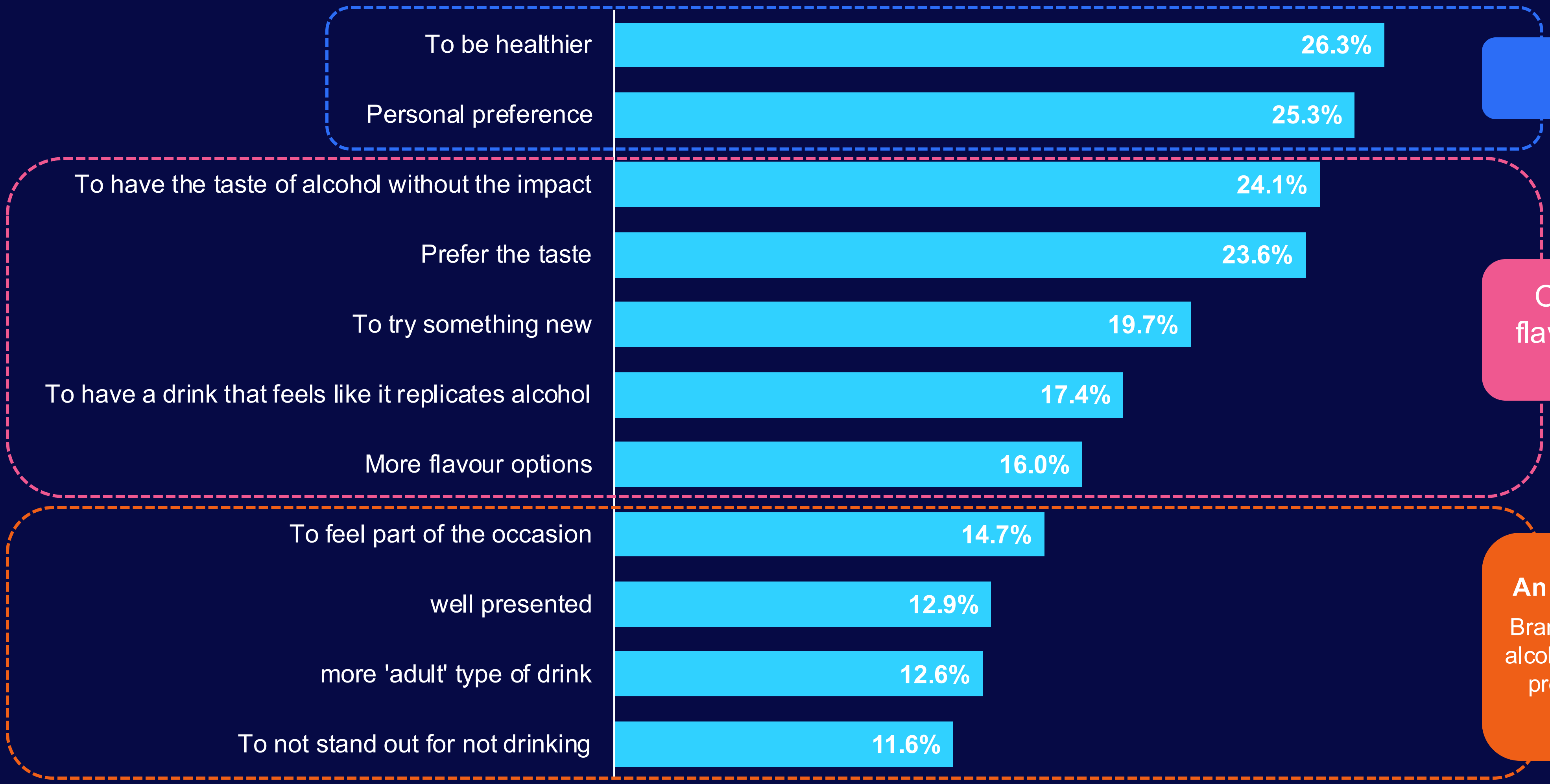
Source: CGA by NIQ REACH EMEA 2025 – Sample: 2,541

With younger consumers increasingly opting for no/low alcohol options in the On-Premise, beverage manufacturers and suppliers must evolve their strategies to stay relevant and resonate with this demographic



Source: CGA by NIQ REACH EMEA 2025 – Sample: 641 - 2,541

Reasons for EMEA consumers to choose no/low beverages



Health & Lifestyle

Opportunity to innovate in flavour without impacting the taste

An apertivo moment for no/low!

Brands can curate a dedicated no/low alcohol occasion by combining elegant presentation, social inclusivity and smart promotions

Source: CGA by NIQ REACH EMEA 2025 – Sample: 4517

Did you know…

2 in 5 consumers choose fruit juices, making it the most popular soft drink, while **1 in 3** go for carbonated soft drinks

?

How is your brand protecting share from non-alcoholic beverage categories like soft drinks and coffee?

Source: CGA by NIQ REACH EMEA 2025 – Sample: 11,605

Competing beyond the Bar

How can no/low alcohol brands compete with non-alcoholic beverages (e.g. Juice, Soft drinks)?

Create inclusive occasions

+ No/low brands must carve out **distinct, socially relevant occasions** (their very own aperitif moment) where they are the preferred choice

+ **Use smart promotions** (bundles, happy hour deals) to drive trial

Innovate without compromising Taste

+ Position no/low drinks as **flavorful and satisfying** alternatives.

+ Highlight how they replicate the taste of popular alcoholic beverages and offer a **more sophisticated and flavourful options** than soft drinks.

Health Beyond Low ABV

+ Low alcohol content alone doesn't equal "healthy" for most consumers.

+ **Highlight low calories, natural ingredients, functional benefits** to appeal health-conscious consumers

Transparency Builds Trust

+ Address concerns over artificial ingredients or additives.

+ Be open about what goes into each drink—**clean labels and clear messaging** build credibility.

For traditional brands, the key to entering the no/low category is thoughtful innovation, creating products that feel fresh and relevant without alienating loyal consumers.

It's about expanding the portfolio, not replacing it- offering moderation with meaning, while staying true to your brand's core identity.

Stephen Wann

Client Director, Customer Success, EMEA

Turning Point

Pathways to growth in a mindful market

How can Beverage Brands compete for success in Europe?

1 Lead with Purpose and Creativity

- Position your brand around **intentional consumption** and **wellbeing**. Build campaigns around **inclusivity and choice.**
- Invest in **experiential marketing** (pop-ups, tastings, and digital storytelling) to connect emotionally with the new consumers.

2 Expand No/Low Alcohol Portfolios

- Innovate with **no/low ABV options** across beer, wine, spirits, and cocktails. Expand portfolios to include **low-and mid-strength variants.**
- Focus on **flavours, variety, and quality** to match consumer expectations, without compromising on taste.

3 Reimagine the no/low occasion

- Create **new rituals** around no/low alcohol — such as “mindful mixology nights” or “social sipping” events.
- Develop **occasion-based packaging** and formats (e.g., single-serve cans for casual moments, elegant bottles for celebrations).

4 Rethink your competitive strategy

- Innovate with **flavour-forward no/low alcohol options** that rival the taste and refreshment of soft drinks, and justify the price
- Use **premium cues** (e.g., glassware, garnishes, storytelling) to elevate the drinking experience

5 Reframe Consumption Norms

- **Normalize no/low choices** through social proof, influencer marketing, and inclusive branding.
- Promote alcohol-free experiences as **equally celebratory and enjoyable.**

How can REACH 2025 support your brand’s growth in the current climate?

Build the No/Low Occasion

Track On Premise habits, channels, and occasions to identify where moderation fits, to then create new rituals around no/low alcohol formats.

Compete on Taste, Value & Satisfaction

Understand category satisfaction, value perceptions, and taste preferences to uncover what makes no/low alcohol products attractive.

Map drivers of trial

Uncover what motivates first-time no/low purchases- health, taste, social acceptance, or curiosity. Understand what’s important for health-conscious segments.

Redefine value

See how financial pressures affect alcohol consumption and use it to adjust pricing strategies, drive promotions and offers, or introduce accessible luxury format.

Leverage influence touchpoints

Map which social platforms, peer groups, or in-venue cues are most likely to influence moderation and wellness trends and drive no/low category engagement.

Optimize channel strategy

Identify which venues, formats, local flavours, occasions and dayparts are most receptive to no/low categories

Go deeper on moderation with REACH 2025

As moderation continues to reshape the On Premise landscape, the insights you've just explored offer a valuable snapshot of this evolving trend. ***But they're just the beginning.***

REACH 2025 takes you further - delivering the most up-to-date and comprehensive exploration of moderation behaviours, with fresh 2025 data, sharper consumer segmentation, and global perspectives. It builds on the foundations laid in this deck, offering a deeper, more detailed understanding of **how and why moderation is evolving.**

Beyond moderation, REACH 2025 also uncovers a wide range of emerging and evolving On Premise trends - from **drink choices** and **venue preferences** to **accessible luxury**, **wellness**, and the **influence of social media.**

What's included?

- **Updated 2025 data on frequency of alcohol consumption at home and in the On-Premise**
- **Shifts in category preferences and attitudes toward alcohol and what's driving them**
- **Deeper understanding of why and how moderation is evolving across market**
- **How consumers are actively moderating - from drink choices to social behaviours**

Get actionable consumer intelligence with precise insights and create revenue-boosting strategies.

Become On-Premise category champion by understanding shifting consumer preferences.

Use tailored market representation so you can unlock untapped revenue opportunities.

Optimize your category and shape drink choices, attract consumers, and increase their satisfaction.

Justify stocking decisions by proving market demand with real insights and gain a competitive edge

How, When, Where and Why?

Explore the full On-Premise consumer experience and behaviours winning

Is your brand ~~aligned~~ in the no/low space?

Want to understand how our solutions can help your brand succeed in the EMEA?

Connect with our team of BevAI experts today!

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