REFORMING ALCOHOL TAXES
IN A COST OF LIVING CRISIS

Analysis of off-trade alcohol prices and the lower-strength market in Great Britain in the context of the alcohol duty reforms

RESEARCH REPORT

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Executive summary

Key points

- **The price of alcohol sold in shops was lower, after adjusting for inflation, in 2025 than in 2018**
- **Real-terms alcohol prices rose following the duty reforms in August 2023, but this did not offset below-inflation price rises during the cost-of-living crisis between late 2021 and early 2023**
- **The average strength of alcohol has fallen since the duty reforms, particularly for beer and wines**
- **The introduction of a lower-strength duty threshold at 3.5% ABV appears to have been successful in its aim of encouraging product reformulation, particularly for beer**

This report presents new analysis of detailed data on household purchasing of alcohol from shops (the off-trade) in Great Britain to explore how alcohol prices and the strength of alcoholic products has changed since 2018. We particularly focus on changes during the cost-of-living crisis between late 2021 and early 2023 and following the reforms to alcohol duties that took place in August 2023.

We find that average alcohol prices rose gradually between 2018 and mid-2021, then levelled off, before rising sharply around the time of the duty reforms and more gradually since. However, adjusting for inflation reveals a different picture, with real-terms prices relatively stable until late 2021, at which point they began to fall. Real-terms prices did rise around the time of the duty reforms, but across all types of alcohol, average prices were lower in late 2025 than they were in 2018 after accounting for inflation. These trends are similar across the distribution of prices, although there is some evidence to suggest that the gap between the cheapest products and the rest of the alcohol market has grown since the reforms.

Across multiple analyses, we find evidence that consumers have responded to price changes, either buying more or less of some products at various points in the price distribution, or shifting their purchasing to alternative products at different price points or with different alcoholic strengths. However, these responses are complex and likely to vary between individuals and population groups.

The off-trade alcohol market is heavily concentrated at the lower end of the price scale, with the cheapest 25% of products accounting for 60% of all alcohol sold in 2022/23 and the cheapest 50% accounting for 84% of sales. The beer and cider markets display the strongest concentration at lower prices, but there is little clear evidence that these patterns have changed following the duty reforms.

The report also explores changes in the average alcohol content of alcoholic products and finds that this has been falling since the duty reforms were implemented in August 2023. This is driven by falls in the mean ABV of beer, which has fallen by around 0.1%, and wine, that has fallen by around 0.4%. These falls are due to a combination of product reformulation and consumers switching to lower-strength products.

Of particular note is the substantial and rapid growth since the duty reforms in the lower-strength beer market (1.3-3.4% ABV). This follows a shift in the lower-strength duty threshold from 2.8% to 3.5% that has been followed by a notable increase in reformulations that bring products within this range. There have also been clear signs of growth in the number of cider and RTD products within this ABV range, through a combination of reformulations and new product launches, although these markets remain small compared to lower-strength beer.

Introduction

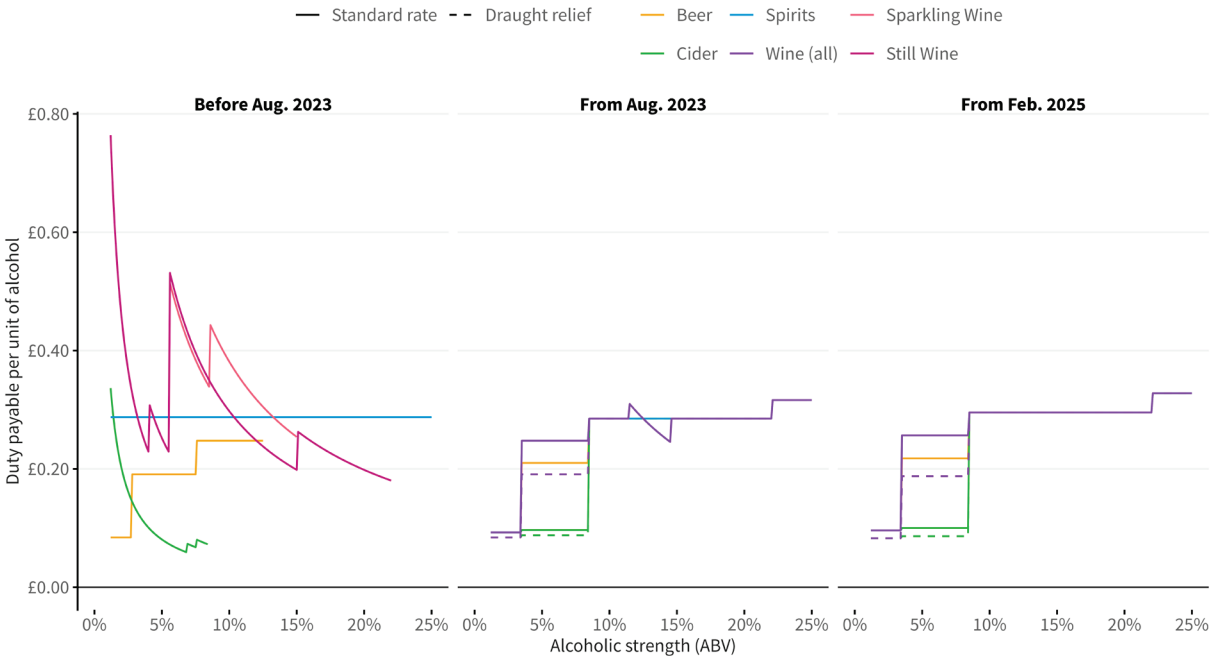
This report provides an overview of the prices of alcohol sold in the off-trade (i.e. shops) in Great Britain between 2018 and 2025, with a particular focus on changes around the reforms to alcohol duties that took place in August 2023 (plus a further change to duty rates for wine only in February 2025). This includes changes in the lower-strength alcohol market (products between 1.3% and 3.4% Alcohol By Volume (ABV)), as there is evidence this market saw significant changes following the duty reforms (Angus et al. 2025). The report forms part of an NIHR-funded project evaluating the impact of these alcohol duty reforms and the wider context in which these reforms took place, including the cost-of-living crisis. See **sarg-sheffield.ac.uk/reforming-alcohol-taxes** for more details of the project and for other project outputs. All analysis and conclusions in this report are made by the Sheffield Addictions Research Group (SARG) independently of Worldpanel by Numerator.

The duty reforms

The reforms to alcohol duty involved several changes to the way that alcohol is taxed in the United Kingdom, moving from a hybrid system where some products were taxed on the basis of alcohol content and others on product volume, to a simpler system where all alcoholic products are taxed on the basis of their alcohol content. The system also includes a stepped approach, so that stronger products face higher rates of duty irrespective of their alcohol type. The figure below shows the rate of duty payable per unit of alcohol at different alcoholic strengths under the old system, the revised system introduced in August 2023 and the final system after the 'wine easement' ended in February 2025 (see below). RTDs are taxed as either spirits or wines, depending on their principal alcoholic component.

The impact of the duty reforms on duty rates by product

Alcohol duty payable per unit of alcohol by alcoholic strength and product type



The key changes were the shift of cider and wine to being taxed on the basis of their alcohol content, the introduction of a 'draught relief' which means a lower rate of duty applies to many beers and ciders sold in the on-trade and the application of a lower rate of duty for products below 3.5% ABV. Previously there had been a lower rate for beers only below 2.8% ABV, but this threshold was increased and applied across all types of alcohol. At the same time as the reforms were introduced, an inflation-linked duty increase of 10.1% was applied to all duty rates. Finally, a temporary 'wine easement' was put in place for wine products between 11.5% and 14.5% ABV under which they were all taxed as if they were 12.5% ABV, effectively continuing to tax them by volume. This easement remained in place from 1st August 2023 until 1st February 2025. At a product level, the effects of the reforms on the tax payable were diverse, depending on the product type and ABV, with duty rising for most beers, many wines and higher-strength spirits and falling for RTDs, some ciders and lower-strength spirits (Wilson et al. 2025).

The data

The analysis presented here uses data from Worldpanel by Numerator (formerly Kantar) collected as part of their Take Home panel. This is a continuous panel of approximately 30,000 households across Great Britain. The Worldpanel sample is recruited through stratified quota sampling, with quotas set for geographic region, household size, presence of children and age of main shopper. Socioeconomic group is not included in the sample targets but is part of the weightings used to ensure the survey population is representative of Great Britain. Participating households provide longitudinal data on their purchasing over time, with continuous replenishment to replace households that leave the sample and ensure the panel remains representative.

Sheffield Addictions Research Group holds Worldpanel data from January 2018 to December 2025. This includes details of every alcohol purchase made by a participating household that was brought into their homes. For each purchase the data includes the brand and type of alcohol, the price paid, the volume of product purchased, the pack type and size and the product ABV. From this we can derive the volume of alcohol purchased, measured in UK units (8g or 10ml of pure alcohol). For the present analysis we include only products with an ABV of 1.3% or above, the minimum threshold at which alcohol duty is payable. This gives us a total sample of 5,907,003 purchases, representing 95.9million units of alcohol and a total spend of £52.3 million.

Data processing

For the purposes of this analysis, we define a 'product' as a unique combination of brand, product volume, pack type and pack size. This means that a multipack of 4x440ml cans of Carling is treated as a distinct product from a multipack of 10x440ml cans of Carling. All products are categorised by the data provider into one of five groups:

- Beer
- Cider (including fruit ciders)
- Ready-To-Drinks (RTDs) - pre-mixed spirit or wine-based drinks such as alcopops, spirits + mixers or wine spritzers
- Wine (including fortified wine)
- Spirits (including liqueurs)

We exclude any purchases in the data that have prices that are: i) below the cost of duty and the VAT payable on that duty (i.e. below the minimum legal sales price under the ban on below-cost sales of alcohol (Home Office 2017)); ii) below the level of the relevant Minimum Unit Price (for Wales since March 2022 and Scotland since May 2018) or iii) exceed maximum plausible price thresholds. These thresholds have been identified and applied as part of previous analyses of detailed market research data (Stevely et al. 2026). See Angus et al. for full details of the approach to data processing (Angus 2026). Overall, these excluded purchases make up 0.62% of all purchases recorded.

Purchases are aggregated for each unique product in the data to the calendar month level by summing the sales value and alcohol volume across all recorded purchases, accounting for household-level sampling weights provided by Numerator. From this we also derive the mean price paid per unit of alcohol (10ml or 8g of pure ethanol) and the mean ABV for each product in each month. For some analyses, we further aggregate the data into annual windows starting on the 1st of August and ending on the 31st July of the following year. This is to align with the timing of the duty reforms, which were implemented on 1st August 2023.

For the majority of analyses presented in this report, we report prices in nominal or 'cash terms' - i.e. without adjusting for inflation. In a few places we also report prices in 'real terms' - i.e. adjusting for inflation. Where we do this we use monthly inflation figures from the Consumer Prices Index including Housing costs (CPIH) published by the Office for National Statistics (Office for National Statistics, n.d.).

Unweighted and weighted analyses

When examining the alcohol market, there are several approaches that can be taken to weighting the data for analysis. In this approach we present both weighted (by volume of pure alcohol sold) and unweighted figures.

- **Unweighted analyses** give all products in the market equal weight, irrespective of their sales volume. This is useful for understanding what the market itself looks like and the potential purchasing options that consumers face. As a result, we sometimes refer to unweighted prices as 'prices faced'. In reality not all consumers are presented with every product in the market and the prices we quote are averages across all those recorded rather than actual prices faced, but we believe this is still a useful measure of the prices at which alcohol could be purchased.
- **Weighted analyses** give greater prominence to products with greater sales volumes. As we are ultimately interested in the volume of pure alcohol sold, since this is what causes the harm, we weight by alcohol volume (as opposed to product volume or sales value) as well as incorporating household sampling weights. Weighting is useful for understanding what products consumers actually purchase and at what prices and as a result we often refer to weighted figures as 'prices paid'. Weighted analyses also incorporate household panel weights provided by Numerator to ensure that the data is representative of the population of Great Britain.

Section 1: The changing price of alcohol

This section explores changes in the price of alcohol over time and how prices may have changed differently for higher- or lower-priced products.

Trends in the average price of alcohol

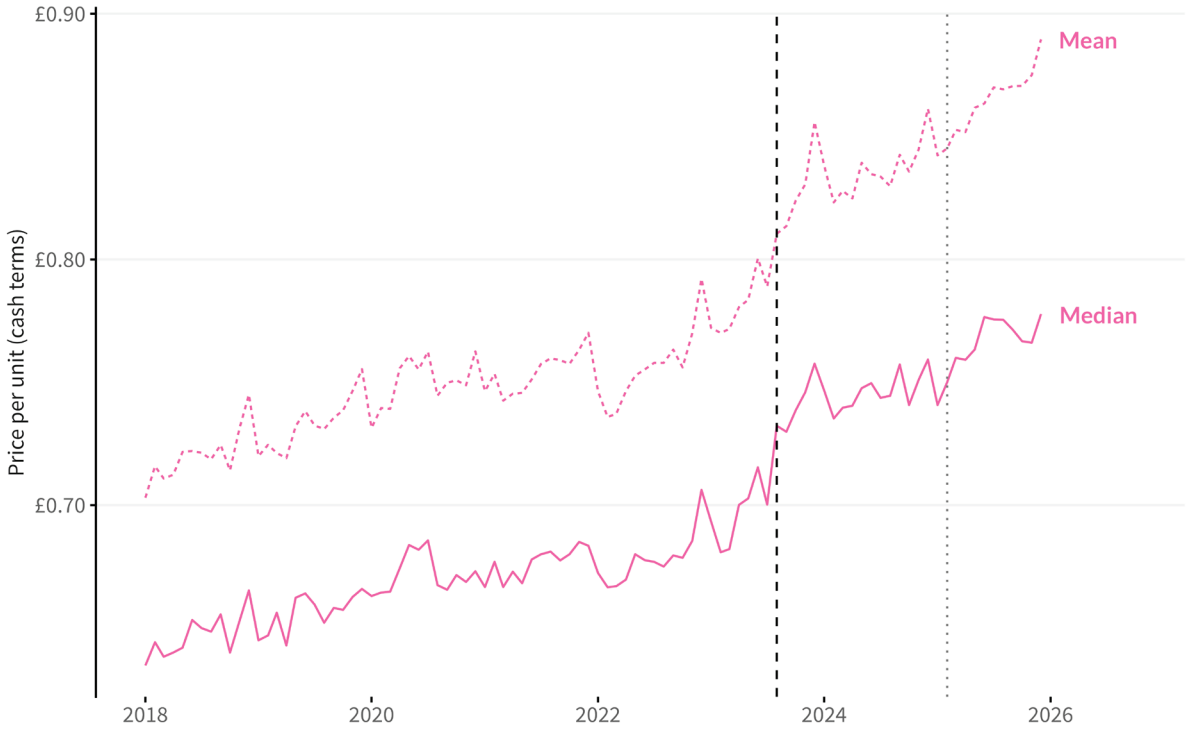
First, we plot trends in both mean and median prices over time for all alcoholic products and separately for each type of alcohol.

All alcohol, unweighted

Overall the price of alcohol faced by consumers has risen over time, from a mean of £0.70 per unit in January 2018 to £0.84 in December 2025. The rate of increase has not been stable over time, with prices rising particularly sharply during 2023, although this began before the duty reforms. The higher mean price than median price indicates that the distribution of prices faced is skewed, with some relatively higher-priced products dragging up the mean. However, the broadly similar trends suggest changes in price occurred across the price distribution. Note that the trends shown here could reflect a combination of both individual products changing their price over time and the composition of the market changing as some products are removed from the market and new products are launched.

Average price of alcohol (unweighted)

Vertical dashed line shows the date of the duty reforms
Vertical dotted line shows the date of the removal of the 'wine easement'

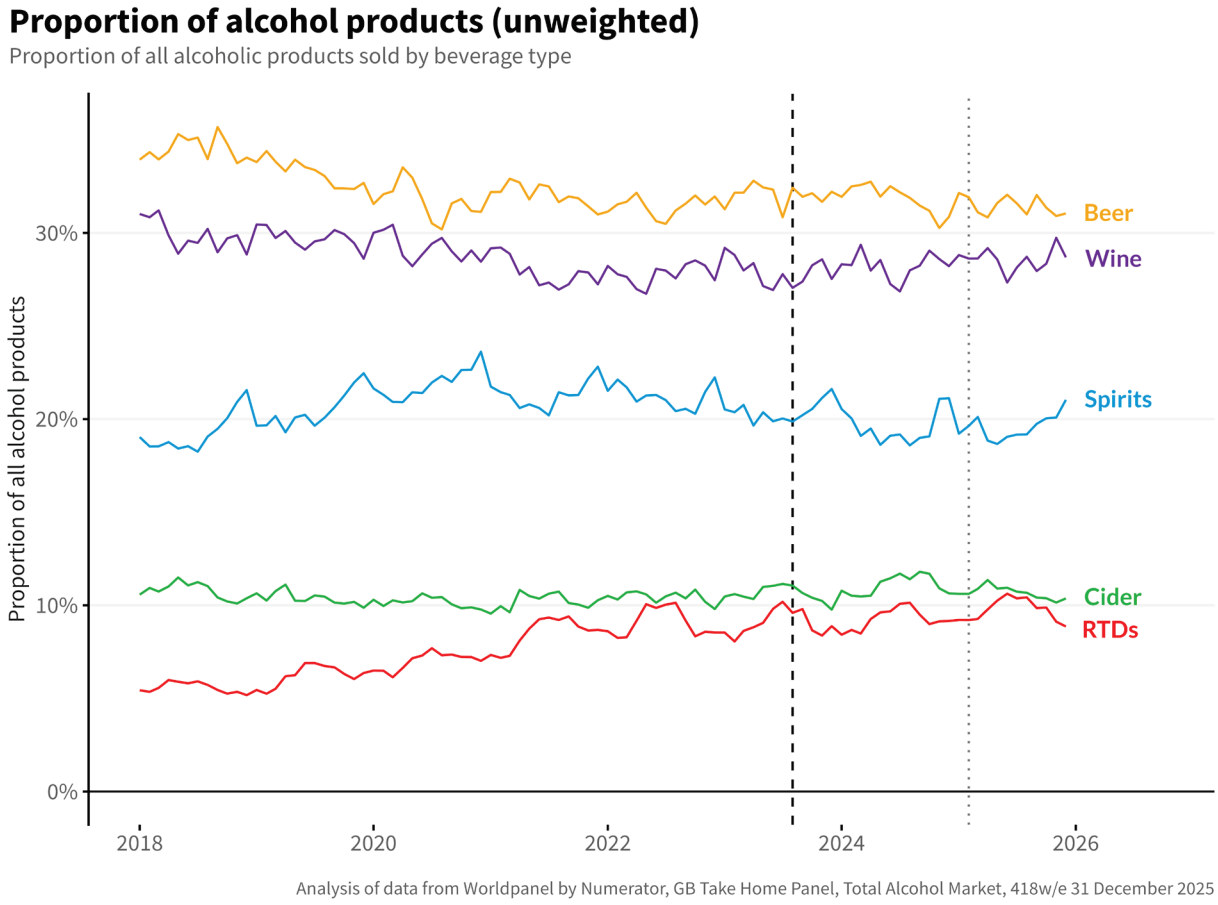


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Trends in unweighted prices by drink type can be found in the Appendix Figures A1-4.

Proportion of products on sale by drink type, unweighted

In order to understand the relationship between trends within drink categories and those for the overall alcohol market, it is useful to understand the relative market share of each category. Here the unweighted figures are simply a measure of the number of unique products on sale in each drink category. Overall, beer products are the most common, making up 31.0% of all unique products purchased in December 2025. Wines are the next most common, comprising 28.7% of the market, followed by spirits (21.0%), cider (10.4%) and RTDs (8.9%). These market shares have changed relatively little over time, although the proportion of products that are RTDs has grown steadily, at the expense of beer (between 2018 and 2020) and spirits (since 2021).

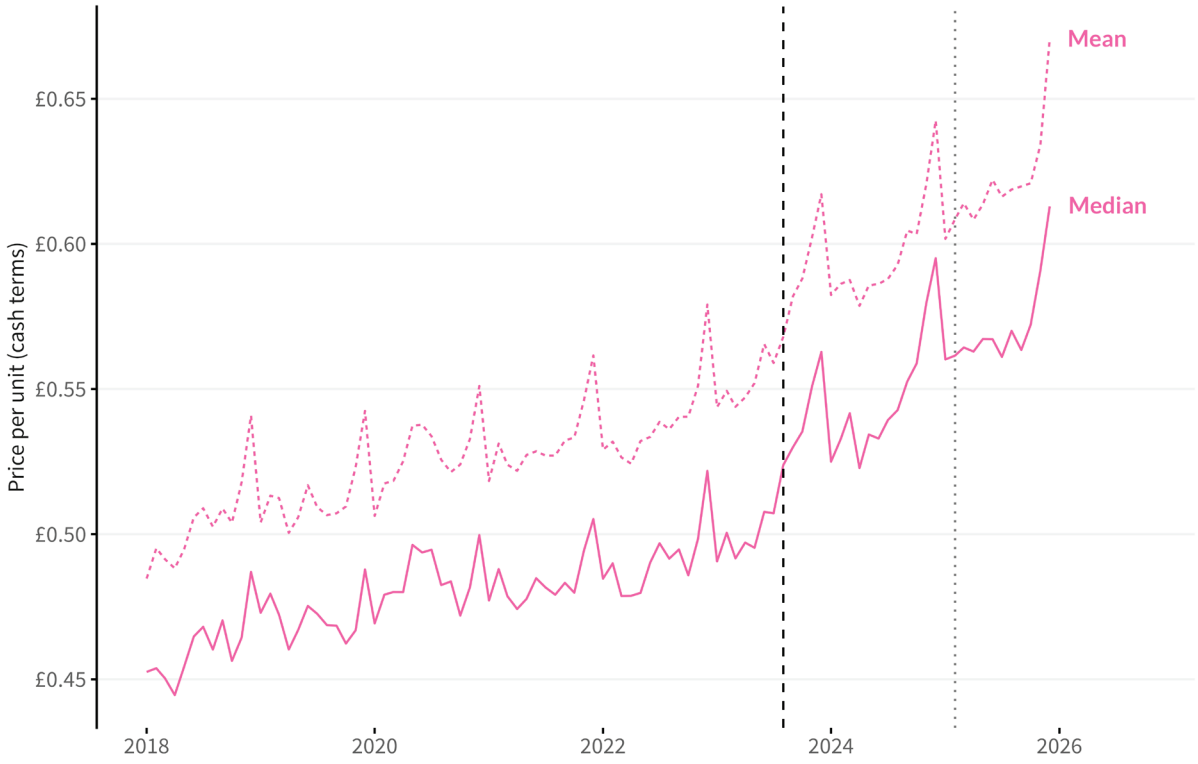


All alcohol, weighted

Incorporating sales volumes to weight the figures and give a clearer picture of the prices that consumers are actually paying has relatively limited impact on the overall trends in average prices. However, it does lead to substantially lower levels - a mean price paid of £0.60 per unit in December 2025 compared to £0.84 unweighted. This illustrates that consumers purchase substantially greater volumes of the cheaper products at the lower end of the price distribution. Weighting also introduces a much clearer seasonal pattern - with notable spikes in the prices that consumers pay in December of each year. The fact that these spikes are not apparent in the unweighted data strongly suggests that these are driven by consumers choosing to buy more expensive products in the run up to Christmas, rather than prices of individual products increasing at this time of year.

Average price paid for alcohol (weighted)

Mean and median sales price of alcohol weighted by volume of pure alcohol



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

By drink type, weighted

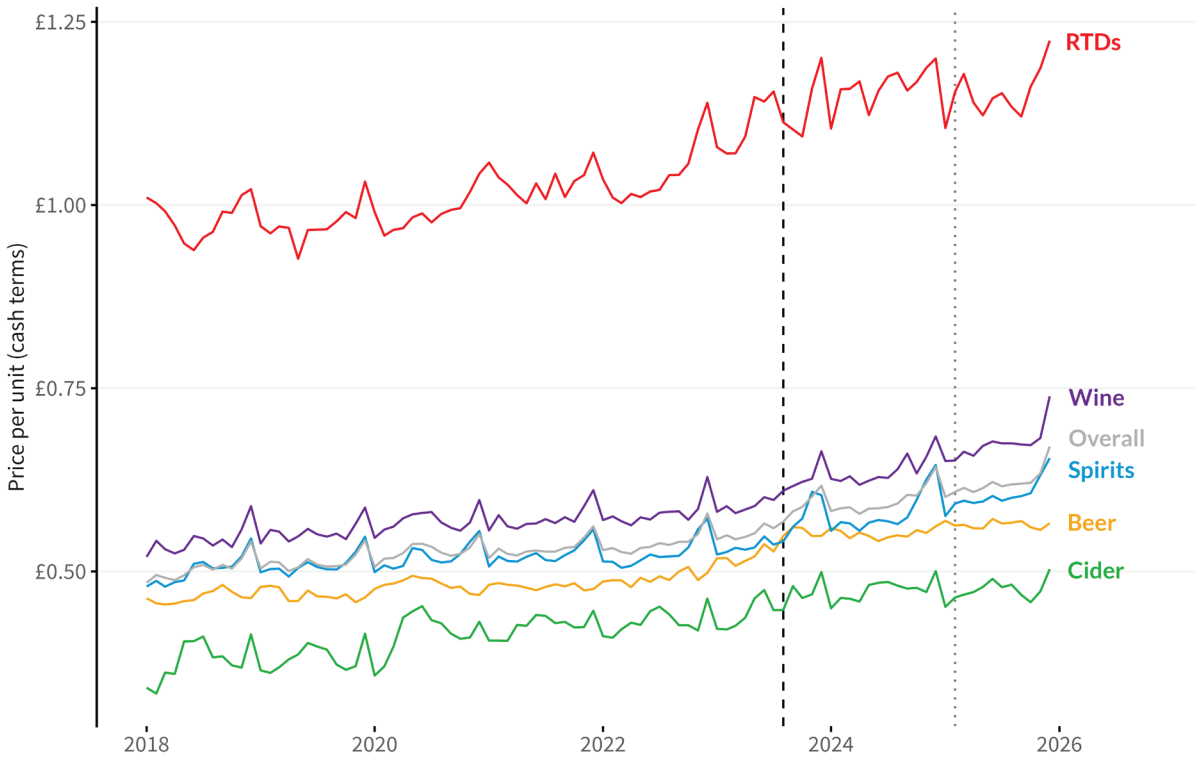
Separating out the weighted mean prices by drink type shows substantial differences in average prices paid, with cider being the cheapest, with a mean price of £0.50 per unit in December 2025, followed by beer (£0.57), spirits (£0.65) and wine (£0.74) and with RTDs being the most expensive (£1.22)

There are also some differences in trends over time between drink types, although these are relatively subtle. Mean prices paid for beer remained almost unchanged between 2018 and early 2022, then rose until the immediate aftermath of the duty reforms, and have been largely stable again since. Prices paid for cider rose in early 2020 and again shortly before the duty reforms but have otherwise been generally stable. Prices paid for spirits rose around the time of the duty reforms and have continued to rise, albeit more slowly since then. Prices paid for wine have risen gradually across the whole period since 2018, but with a larger increase around the time of the duty reforms. Finally, prices paid for RTDs rose steadily between 2020 and early 2024, but were largely stable through 2025.

This figure also illustrates the seasonal spikes in prices paid around Christmas that we see in overall weighted mean prices, but only for spirits, wine and, to some extent, cider. This suggests that the spikes in the overall figure above may be driven by a combination of consumers buying more expensive products within the same drinks category and switching to purchasing more products from categories that are generally more expensive (e.g. more RTDs, wine and spirits compared to beer and cider).

Mean price paid for alcohol (weighted)

Mean sales price of alcohol by beverage type weighted by volume of pure alcohol



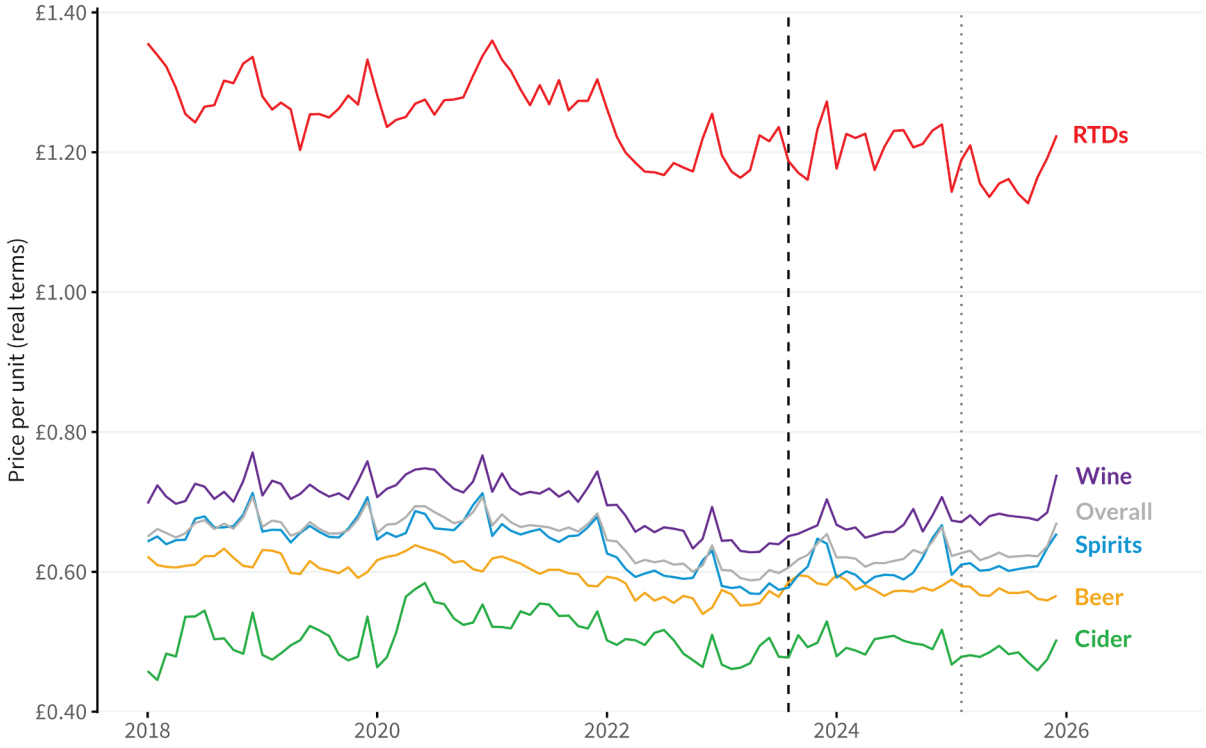
Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Mean prices adjusted for inflation, weighted

Adjusting the sales-weighted mean prices for inflation tells a different story, real-terms prices paid were relatively stable between 2018-2020, fell in 2021-22, rose at the point of the duty reforms (except for RTDs) and have subsequently largely stabilised at a level below the 2018 average.

Mean real-terms price paid for alcohol (weighted)

Mean sales price of alcohol by beverage type and overall weighted by volume of pure alcohol
Prices adjusted to December 2025 values



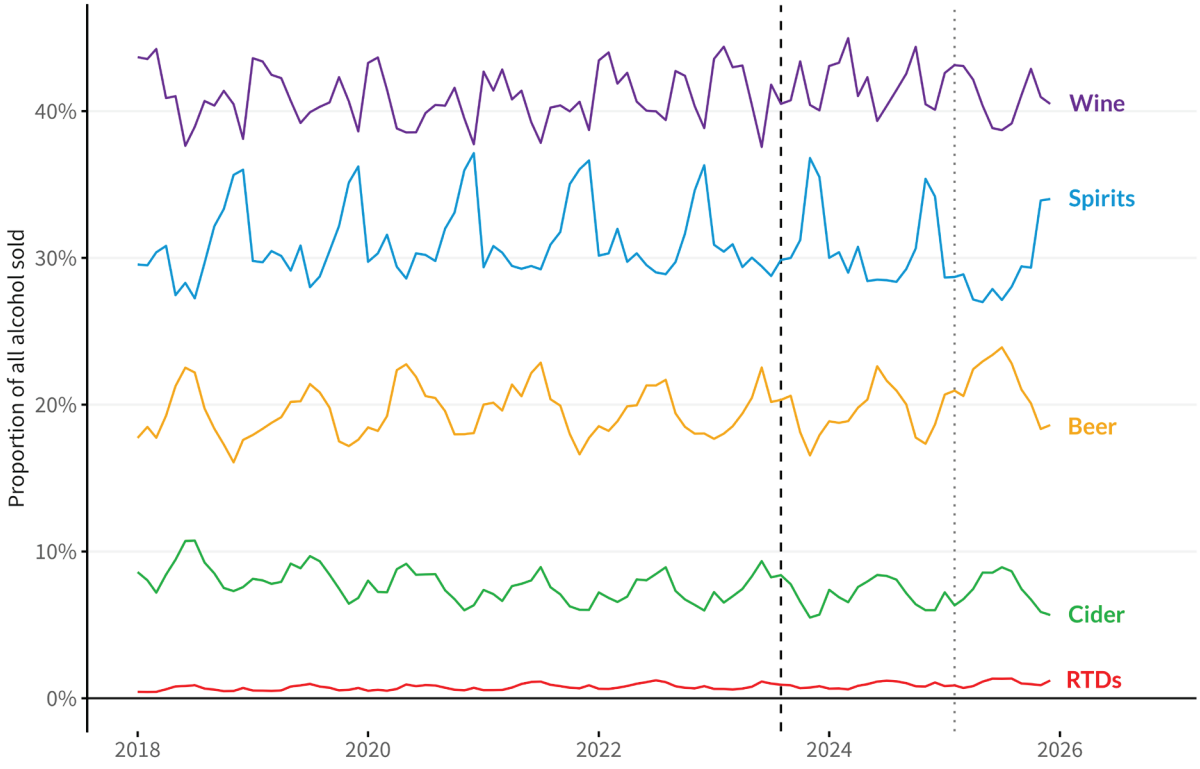
Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Market share by drink type, weighted

Looking at the share of alcohol sales (in terms of alcohol units) that comes from each drinks category presents a different picture to the unweighted analysis of the share of products. The highest volume of off-trade alcohol sold has consistently been as wine, comprising 40.5% of alcohol sales in December 2025, followed by spirits (34.0%). In contrast, although there are more beer products in the market, beer is only the third largest contributor in terms of alcohol volume sold, accounting for 18.6% of the off-trade market. In spite of having quite similar numbers of products in the market, overall far more alcohol is sold as cider (5.7% in December 2025) than as RTDs (1.2%). Other than seasonal patterns, with spirits' market share rising each December with corresponding dips in market share for beer and cider, these proportions have remained very stable over time, although there is some indication of a slight decline in the market share of spirits since the duty reforms.

Proportion of alcohol sold (weighted)

Proportion of pure alcohol sold in Great Britain by beverage type



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Changes in the distribution of alcohol prices

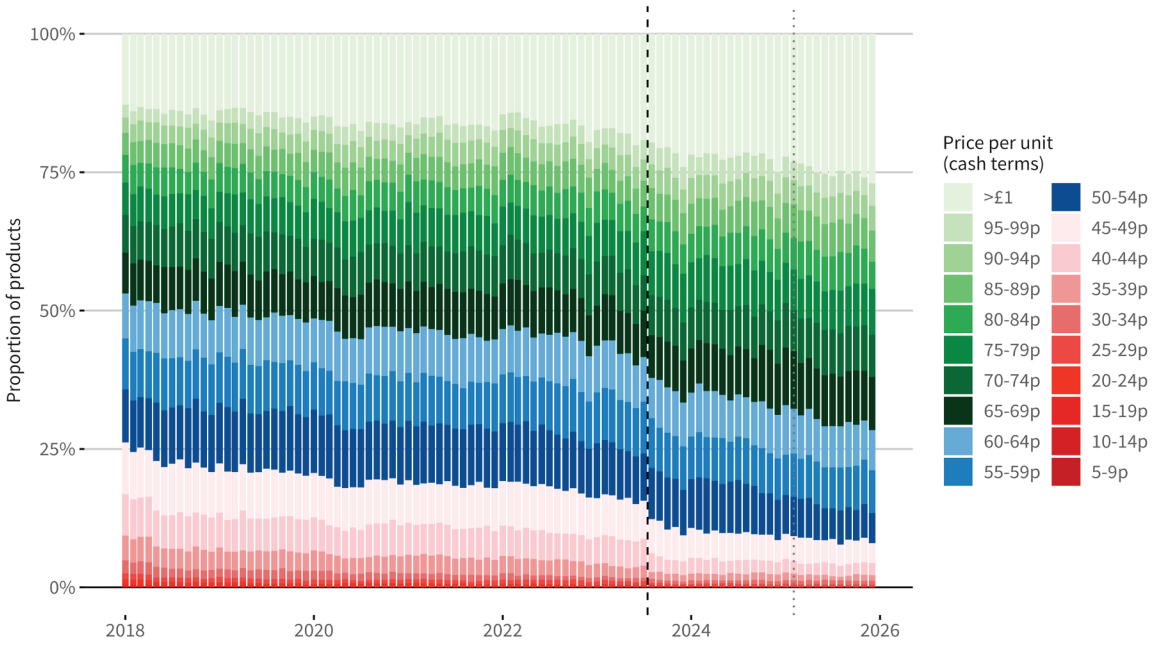
The analysis so far has focussed on the *average* price of alcohol and how this has changed over time. However, there is substantial variation in product prices in the alcohol market. Further, the duty reforms did not affect all products equally, with some products seeing a fall in the duty payable, while others saw an increase (Wilson et al. 2025). In addition, previous research has shown that changes in alcohol taxes are not passed through to the prices faced by consumers in the same way across all products, with prices generally rising more on higher-priced products (Ally et al. 2014). As a result, it is important to look across the whole price distribution to understand how prices have changed since the duty reforms.

Overall proportion of products by price (unweighted)

Separating all alcoholic products on sale into price bands based on their sales price per unit of alcohol illustrates a gradual drift towards more expensive products between 2018 and the start of 2020 and little change in prices across 2020-22. This is what we would expect to see, given that these prices are not adjusted for inflation. There is some evidence of a drift towards more higher-priced products in the market in the months prior to the duty reforms and a sharper change, particularly in the proportion of products being sold at very low prices (below 50p per unit), immediately following the reforms. Since this shift, the proportion of products being sold at very low prices has remained fairly stable, while the proportion of products at higher prices (above 65p per unit) appears to have increased. Aggregating the figures into 12-month bands (Figure A5) shows that in the year prior to the duty reforms (2022/23) 16.6% of products purchased were priced at less than 50p per unit compared to 10.5% in the year following the reforms (2023/24). Correspondingly, the proportion of products purchased that were priced above 65p per unit rose from 25.9% in 2022/23 to 30.7% the following year. The proportion of products priced between 50 and 65p per unit remained largely unchanged.

Proportion of alcohol products sold by price per unit

Proportion of unique products purchased by price per unit of pure alcohol



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

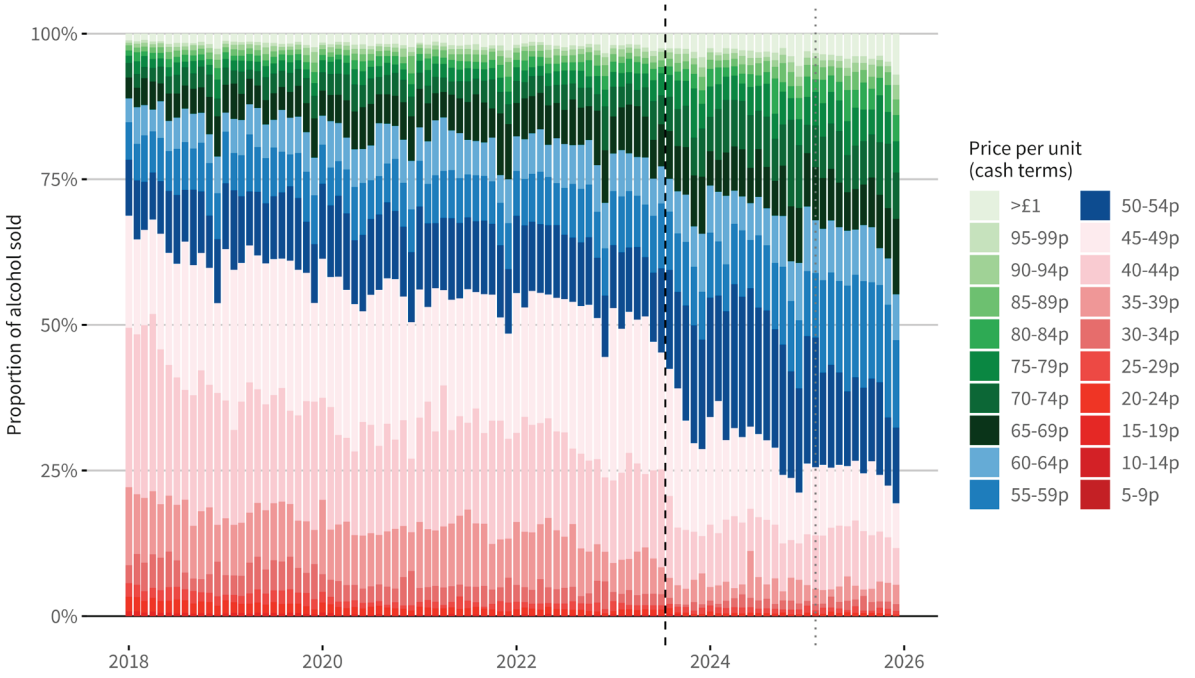
A comparable figure showing the unweighted trends in the distribution of prices after adjusting for inflation is shown in Figure A6.

Overall price distribution of alcohol (weighted)

As may be expected from the large difference in mean prices paid, weighting by sales volume substantially increases the amount of lower-priced alcohol in the figure. This emphasises the extent to which alcohol purchases are concentrated in lower-priced products. Incorporating sales weights also illustrates the greater extent to which sales of lower-priced products fell immediately following the duty reforms. Grouping the data into 12 month bands (Figure A7) shows that in the 12 months prior to the duty reforms, 50.1% of alcohol sold was priced at less than 50p per unit compared to 33.1% in the year following the reforms (2023/24).

Proportion of alcohol sold by price per unit

Weighted proportion of pure alcohol sold by price band



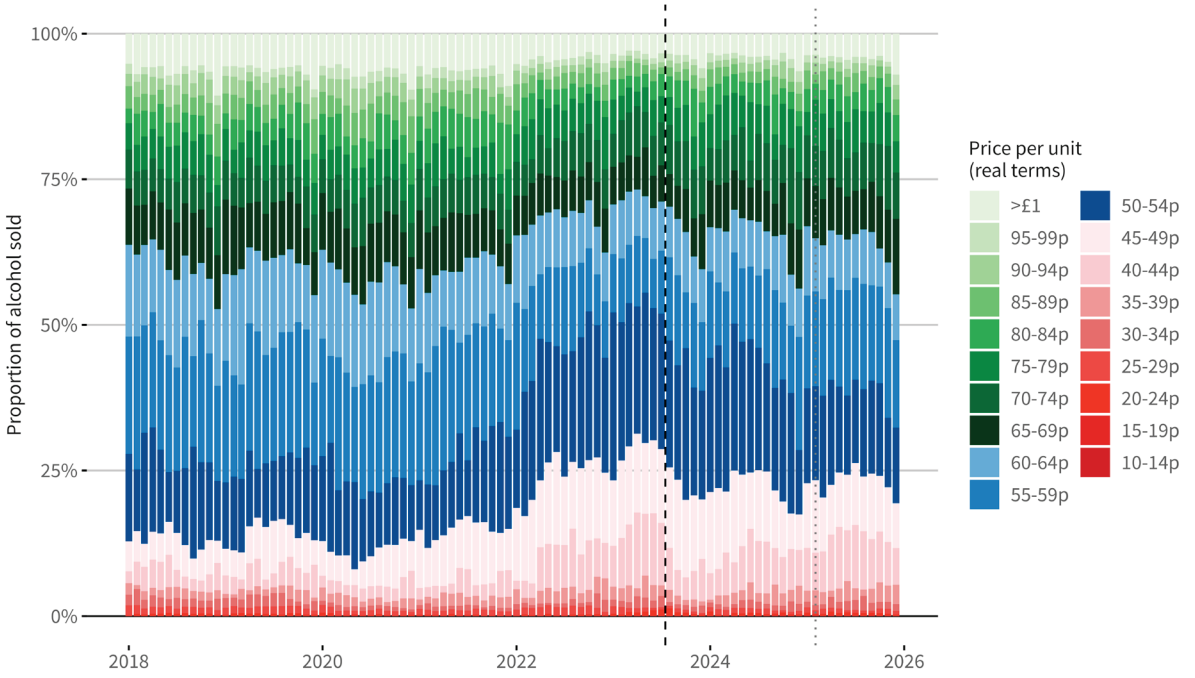
Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Price distribution adjusted for inflation (weighted)

After adjusting for inflation, the distribution of prices in real-terms shows a very different picture, consistent with the trends in mean prices shown previously. Firstly, we can see the much greater volume of alcohol sold at lower prices than before sales weighting. Secondly, the increase in the volume of lower-priced alcohol being sold during the cost-of-living crisis is particularly noticeable in the 50-54p and 40-44p bands. Finally, in spite of the greater proportion of alcohol sold at lower prices from early 2022 onwards, the volume of alcohol being sold at the lowest price points - below 40p per unit - has remained relatively consistent from 2018 onwards.

Proportion of alcohol sold by real-terms price per unit

Weighted proportion of pure alcohol sold by price, adjusted to December 2025 prices



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

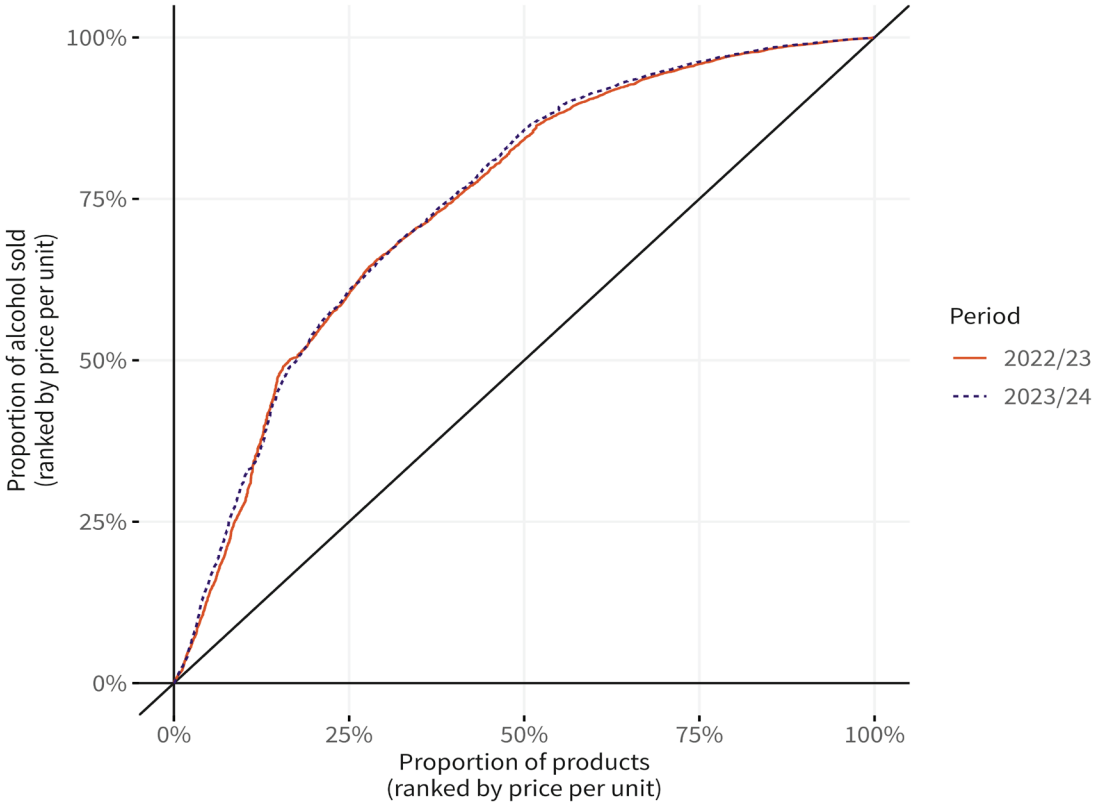
Concentration of the alcohol market in lower-priced products

This concentration of sales in lower-priced products can be examined directly using a Lorenz curve - ranking all purchases by price from low to high and then plotting the cumulative proportion of products against the cumulative proportion of sales at each price point. This is essentially a comparison of unweighted (proportion of products) and weighted (proportion of sales) purchases. The result gives us a visual illustration of the concentration of the alcohol market. A curve below the diagonal would illustrate more sales of higher priced products relative to lower-priced ones, while a curve above the diagonal would show the opposite, with the extent of the deviation from the diagonal showing the degree of concentration in higher/lower price products.

The figure below shows the Lorenz curve of alcohol sales for both the year before and the year after the duty reforms. The high degree of displacement above the diagonal line shows that sales are heavily concentrated in cheaper products. Specifically, the cheapest 25% of products accounted for 60.3% of all alcohol sold in 2022/23 and the cheapest 50% of products made up 84.2% of all sales. The figure also illustrates that there was very little change in this concentration following the duty reforms.

Concentration of alcohol sales in cheaper products

Lorenz curve of proportion of alcohol sales vs. proportion of products ranked by price

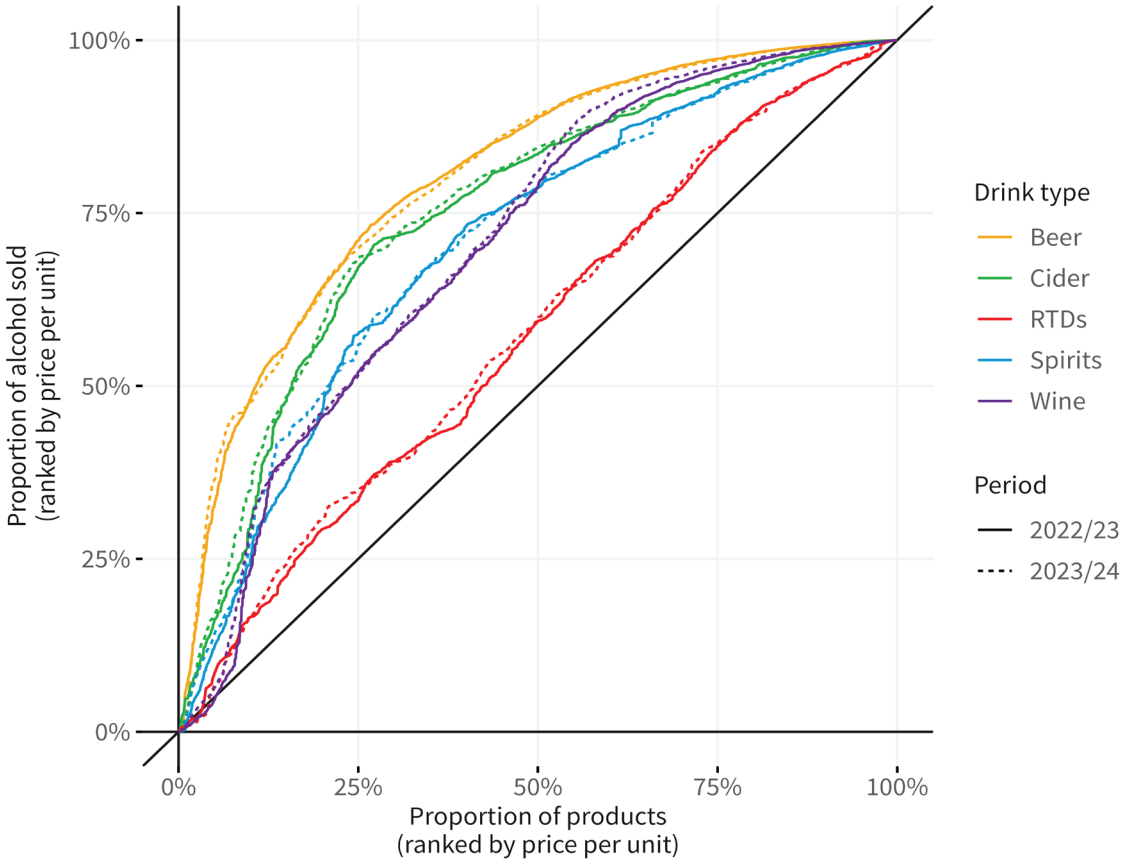


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Separate Lorenz curves by drink type show that beer sales are the most concentrated in a small number of lower priced products, with the cheapest 25% of beer products making up 71.1% of beer sales in 2022/23. The equivalent figures for cider, spirits, wine and RTDs are 67.1%, 57.6%, 52.0% and 33.5% respectively. No individual drink types show substantial evidence of changes in this concentration following the duty reforms, although there is some suggestion of a small increase in concentration for lower-priced spirits and higher-priced wines.

Concentration of alcohol sales in cheaper products

Lorenz curve of proportion of alcohol sales vs. proportion of products ranked by price



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

The relationship between cheap and average alcohol prices

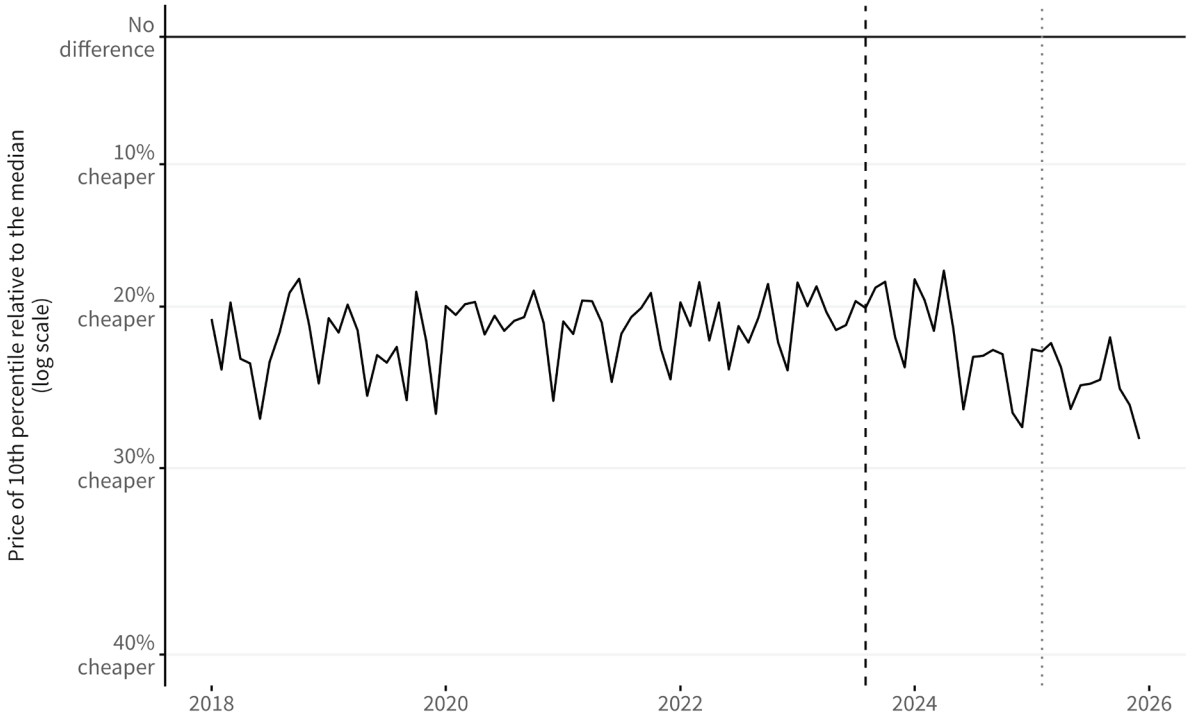
One way of summarising the shape of these price distributions, that puts the focus specifically on the trends in prices of the lowest-priced alcohol, is to look at the relationship between price at the 10th percentile and the median price. The ratio of the two tells us how much cheaper than the average product the cheapest products are. This is of particular importance from the perspective of public health, as heavier drinkers, who suffer much higher rates of alcohol-related harm, purchase lower-priced alcohol to a much greater extent than moderate drinkers (Morris et al. 2024; Holmes et al. 2014; Black et al. 2014). A ratio closer to one may indicate that there is less very low-priced alcohol in the market, depending on whether there are also changes in more expensive products. Taking a ratio also isolates the impact of changes in the shape of the price distribution at the lower end from the effects of inflation.

All alcohol, weighted

Unweighted analyses are shown in Figures A8 and A9. Incorporating sales weights, we find that the 10th percentile of the price of alcohol sold is around 20-25% cheaper than the median. This gap has widened since the duty reforms, but the change did not begin until early 2024, so it is unclear if it directly related to the reforms. However, the fact that the median price of alcohol has risen since the duty reforms does suggest that at least some of the change may be due to prices at the 10th percentile rising more slowly than those at the median.

Relative price of the cheapest alcohol to the median (weighted)

Ratio of the 10th and 50th percentiles of the distribution of alcohol prices weighted by volume of pure ethanol sold



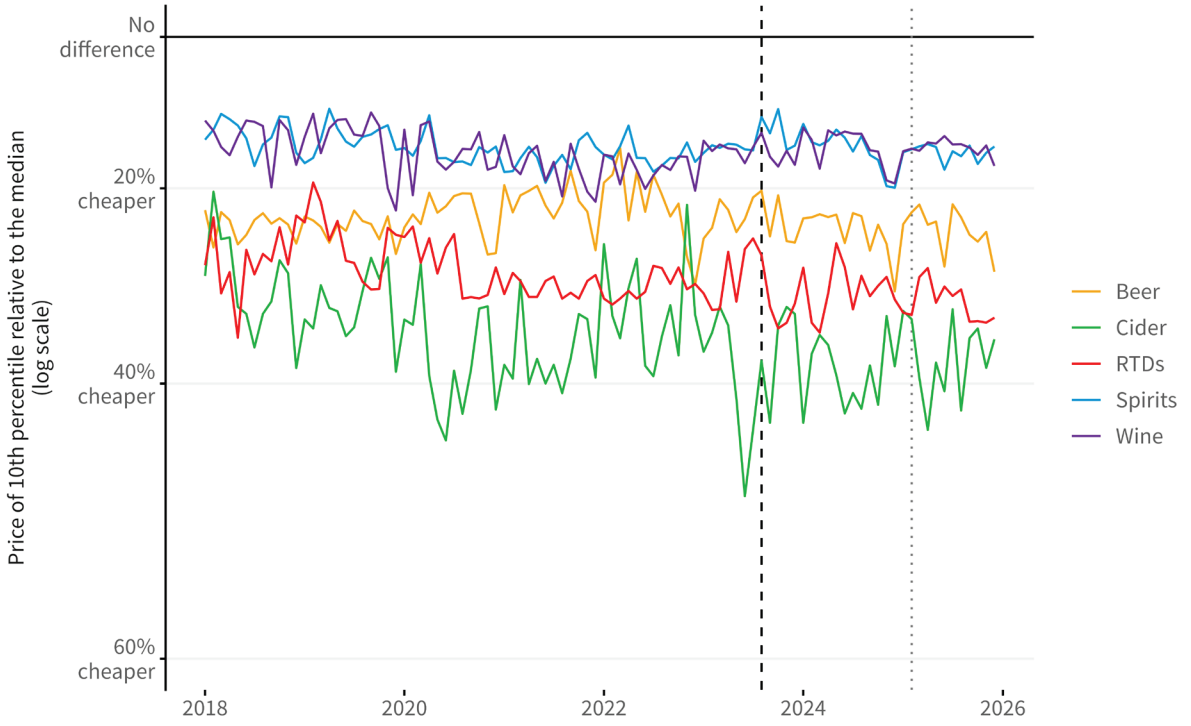
Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

By drink type, weighted

Separating by drink type we can see substantial variation in the gap in prices between the 10th percentile and the median. Low-priced cider shows the largest gap, being around 30-40% cheaper than the median price of cider. The gap is smaller for RTDs and beer, and smallest for spirits and wine, at between 10-20% cheaper. There are few clear trends in this measure for any drink type, although the gap in prices between the cheapest and median price of cider appears to have widened slightly after the duty reforms. It is hard to point to a single explanation for this pattern as the divergence between the weighted and unweighted (Figure A9) trends suggest some change in consumer behaviour over and above changes in the prices of products on the shelves. For example, if the price of the cheapest cider had increased slightly relative to median cider prices, but some consumers had switched their purchasing from standard to lower priced cider, this would produce similar patterns to those we observe for cider. However, the complexity of the trends across beverage types presents a challenge to any simplistic explanation.

Relative price of the cheapest alcohol to the median (weighted)

Ratio of the 10th and 50th percentiles of the distribution of alcohol prices weighted by volume of pure ethanol sold



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Product-level changes in price around the alcohol duty reforms

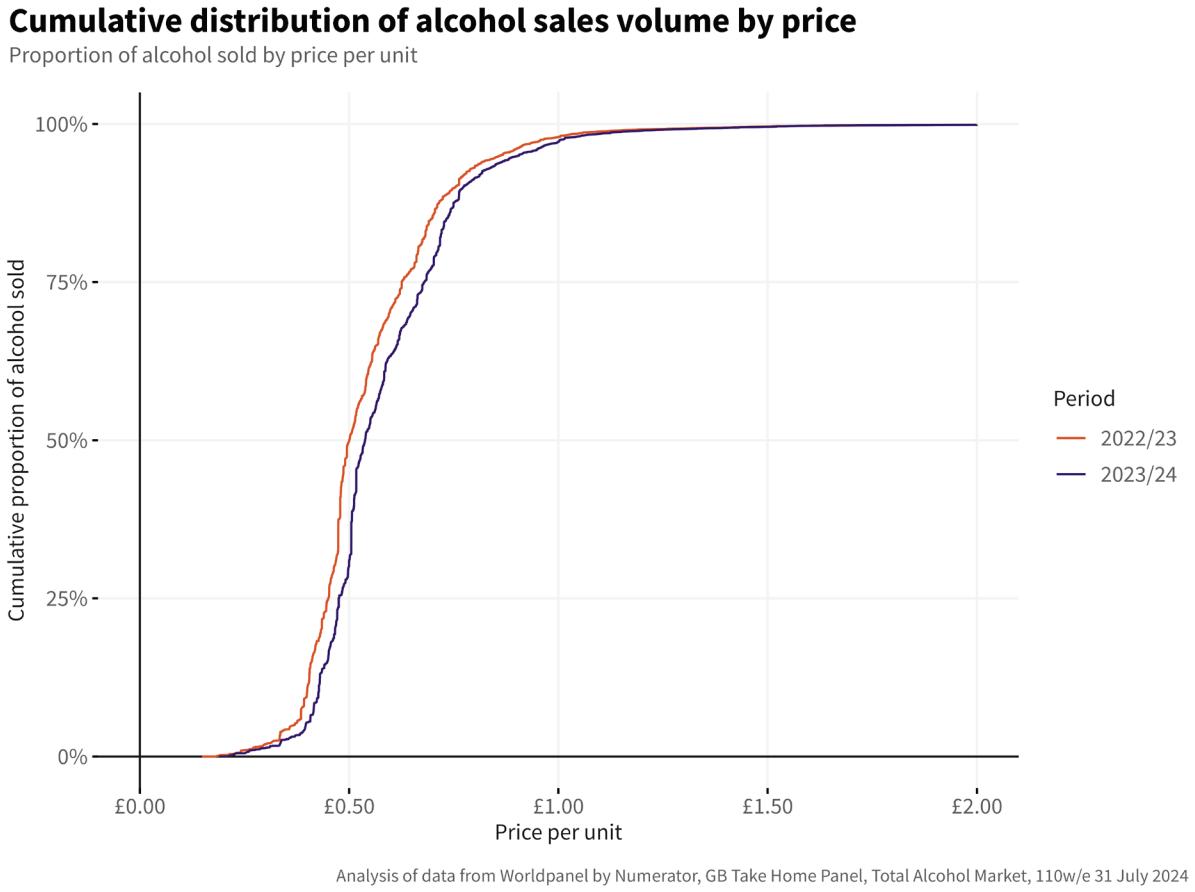
To our knowledge, only one previous study has examined changes in product prices in relation to the UK alcohol duty reforms (Burton et al. 2024). This study used web-scraped alcohol pricing data from a major supermarket to look at pre- and post-reform prices for approximately 600 unique products, not including wine. Here, we expand some of their analyses using data that covers more products and a more comprehensive comparison of the 12 months before and after the reforms. Figure A10 demonstrates a 'QQ plot' comparing product-level prices before and after the duty reforms.

Cumulative Distribution Functions (CDF) by price

Another approach to visualising changes in price across the price distribution is by comparing the Cumulative Density Function (CDF) of alcohol prices from the 12 months before and after the reforms. A CDF visually presents the proportion of products (or, in the weighted version, alcohol sales volumes) that take place at or below each price point. A CDF that shifts to the right uniformly across all prices illustrates that prices have increased across all products similarly, while a CDF with wider horizontal gaps at some price points compared to others would show a change in the underlying shape of the distribution with price rising more at those prices compared to others.

CDF of all alcohol products (weighted)

Unweighted CDFs for the overall alcohol market and by beverage type are shown in Figures A11 and A12. Applying sales weighting is equivalent to producing a CDF of the volume of alcohol sold across the price distribution. In line with previous analyses that have highlighted the larger sales volumes of lower-priced products, the weighted CDF rises much more rapidly than the unweighted version. The gap between the 2022/23 and 2023/24 CDFs is relatively stable across the price distribution, suggesting that prices have increased, in cash-terms, fairly uniformly across all price points.



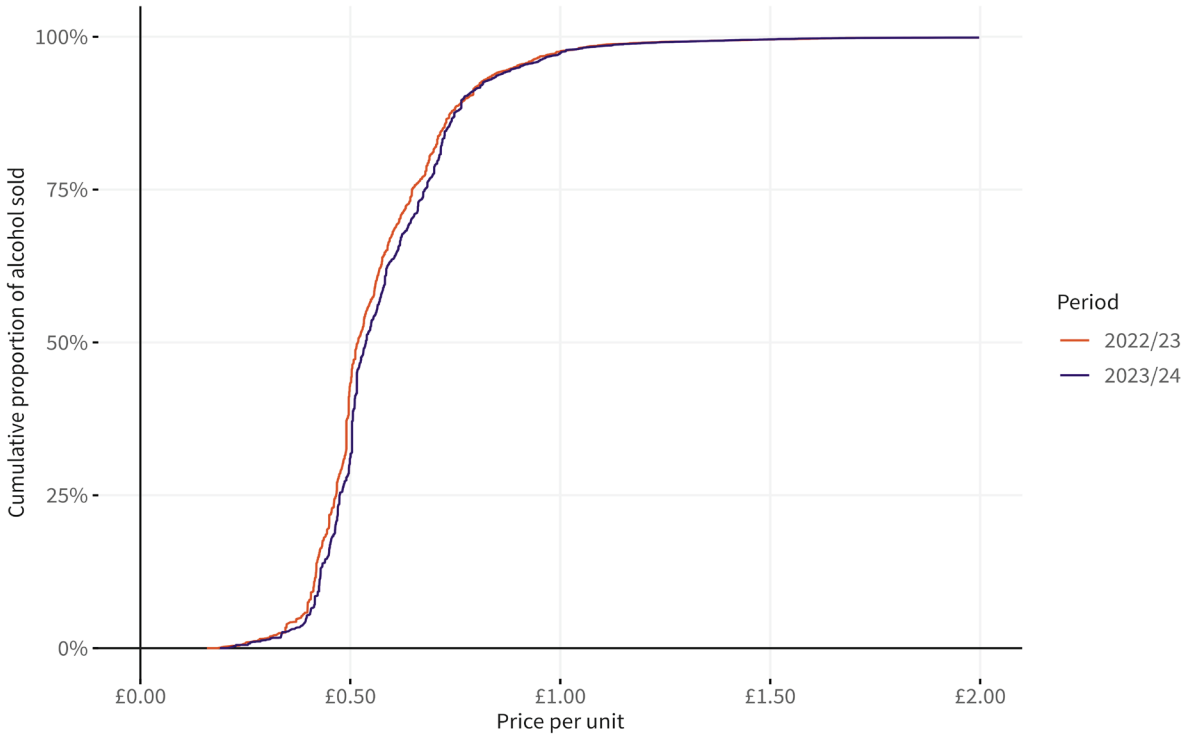
Separate weighted CDFs by drink type are shown in Figure A13, illustrating some differences, with larger cash-terms price increases for higher-priced beer and RTDs and smaller increases for cheaper products.

CDF of all alcohol in real-terms (weighted)

Whether the changes in price really are uniform across the price distribution can be examined directly by inflation-adjusting prices to a common time period, in this case February 2024, the mid-point of the 2023/24 12-month post-reform period. Any gaps between the 2022/23 and 2023/24 lines in this figure therefore directly highlight real-terms increases in prices at that point in the price distribution. This confirms that, after adjusting for inflation, alcohol prices were generally higher in the 12 months after the duty reforms than in the 12 months before. However these price increases are consistent for all but the very cheapest 5% and most expensive 15% of products.

Cumulative real-terms distribution of alcohol sales volume by price

Proportion of alcohol sold by price per unit, adjusted to February 2024 prices



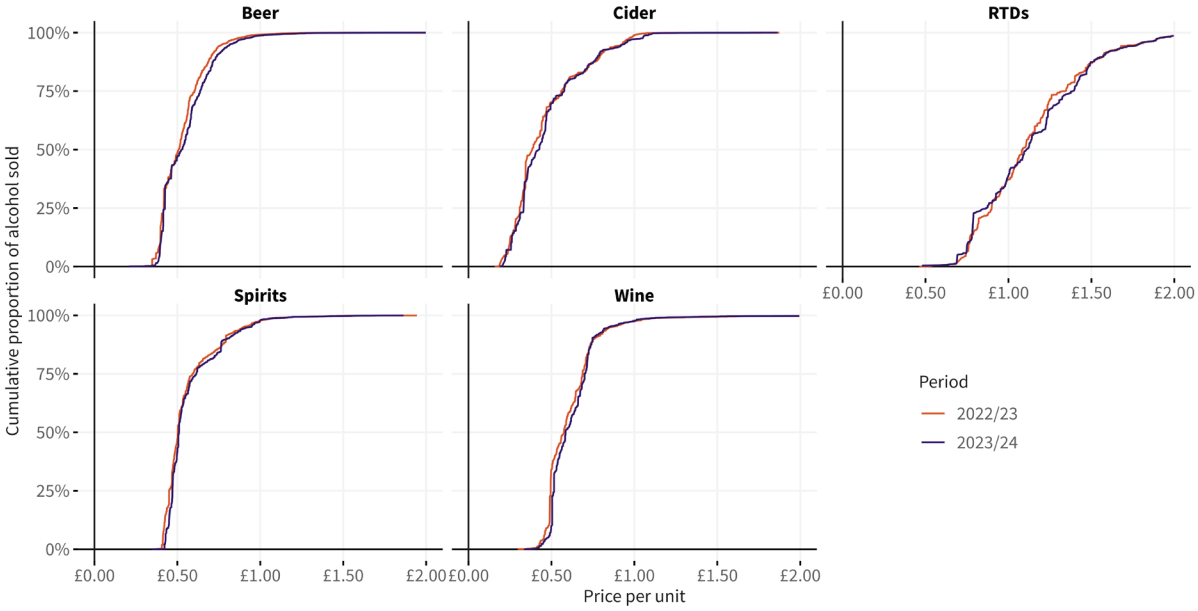
Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

CDF by drink type in real terms (weighted)

A beverage-specific version of this plot highlights some subtleties beneath this aggregate pattern. Only the most expensive 50% of the beer market shows evidence of a real-terms increase in prices following the duty reforms. Similarly, mid-price cider and wine shows evidence of real-terms price rises, with little change in inflation-adjusted prices for other price points and drink types.

Cumulative real-terms distribution of alcohol sales volume by price

Proportion of alcohol sold by price per unit, adjusted to February 2024 prices



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Section 2: The changing strength of alcoholic products

This section examines changes in the alcohol content or strength of alcoholic products. Changes in alcohol content can arise from changes in consumer preferences (e.g. switching from stronger products to lower-strength ones) or from reformulation - where producers alter the alcohol content of their products. Reformulation could take place for a variety of reasons, including for taste, because producers perceive lower-strength products might have more appeal to consumers, or to reduce the alcohol duty payable on the product. The introduction of the new duty system means that across all alcohol, lower-strength products now attract less duty per litre, providing a clear financial incentive to producers to reduce the ABV of their products.

Trends in the average strength of alcohol

First, we plot mean and median ABVs of all alcoholic products sold in the off-trade.

All alcohol, unweighted

Across all products, the mean product ABV rose gradually from 2018-2020 to a peak of 14.0% and has been generally falling gradually since early 2021, reaching an average of 12.8% in 2024/25. The median product ABV has remained relatively stable over this time at around 8%, albeit with a small spike in 2020.

Average strength of alcoholic products (unweighted)

Mean and median ABV of alcoholic products on sale in Great Britain

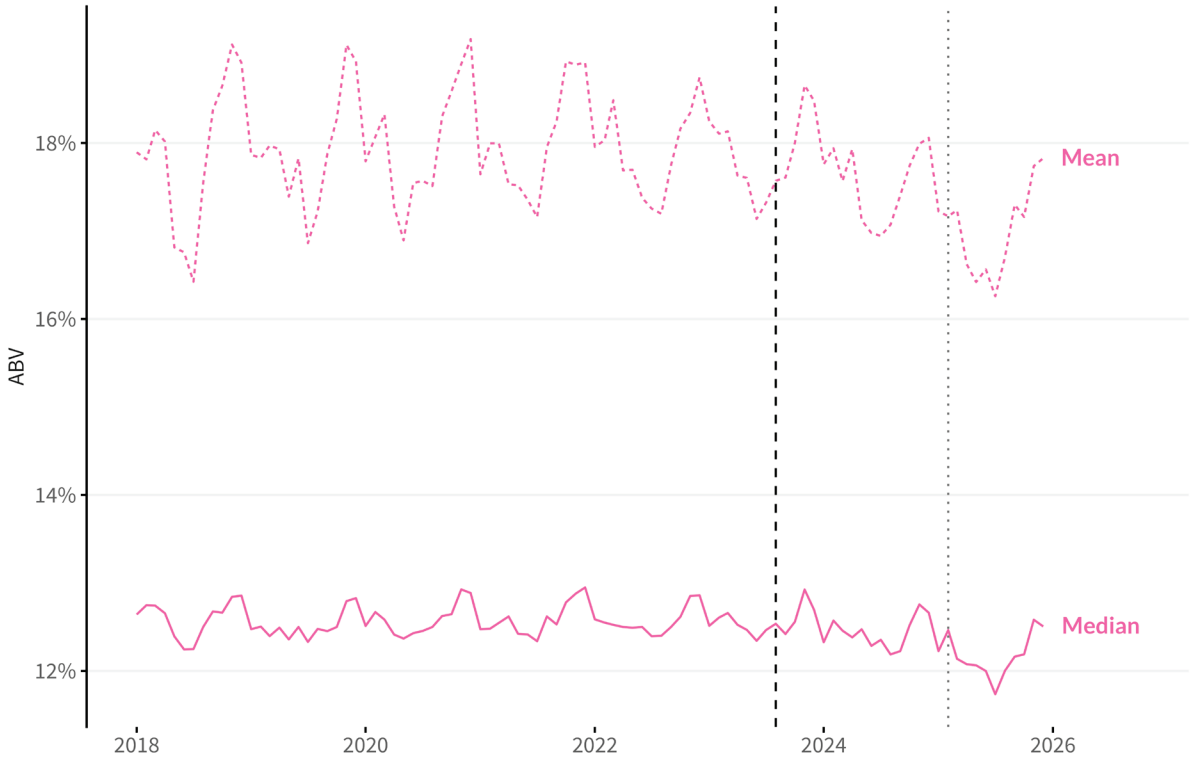
Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

All alcohol, weighted

Applying sales weights leads to an increase in both the mean and median ABV, suggesting that higher-strength products have higher sales volumes, to some extent. Both mean and, to a lesser extent, median ABVs show a distinct downturn following the duty reforms, with a notable dip (and subsequent rebound) in the summer of 2025.

Average strength of alcoholic products (weighted)

Mean and median ABV of alcohol weighted by volume of pure alcohol



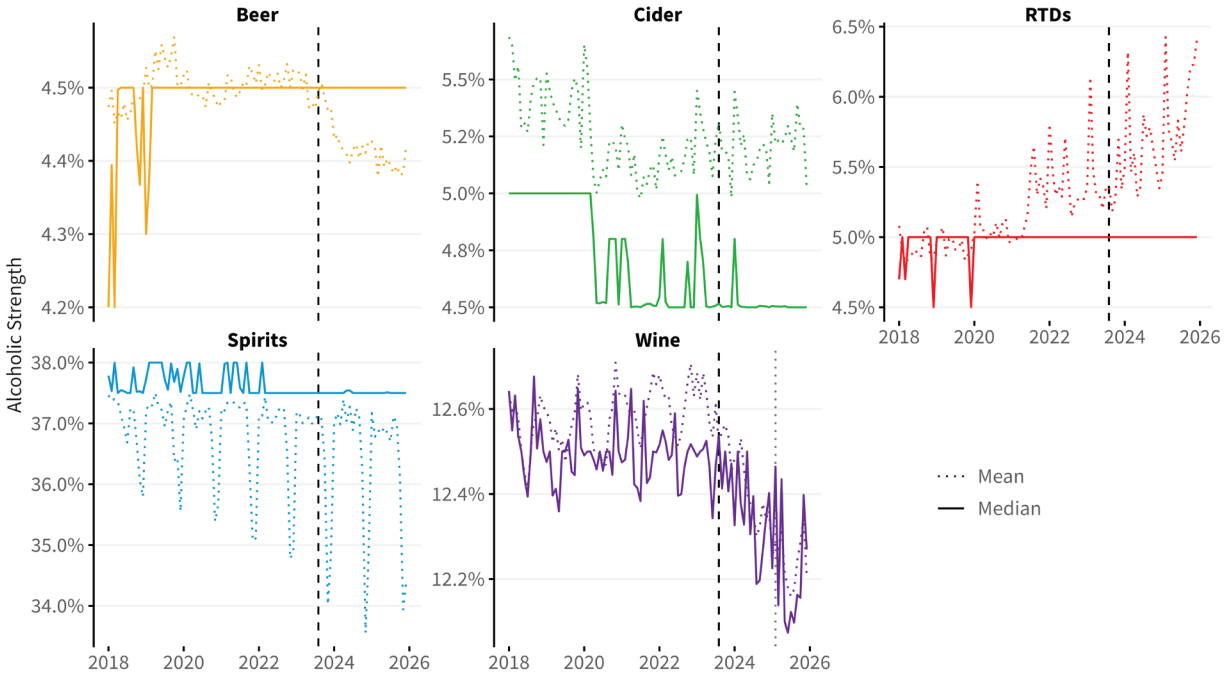
Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

By drink type, weighted

Unweighted mean and median ABVs by drink type are shown in Figure A14. After weighting for sales volumes, we can see some clear associations between average ABVs and the alcohol duty reforms. Mean beer strengths and both mean and median wine strengths have been falling since the introduction of the reforms. Both mean and median cider ABVs fell markedly in 2020, coinciding with reformulation of a leading brand, but have remained generally stable since. Mean RTD ABVs have been rising, while mean spirits ABVs have been gradually falling since 2022.

Average strength of alcohol (weighted)

Mean and median ABV by beverage type weighted by volume of pure alcohol



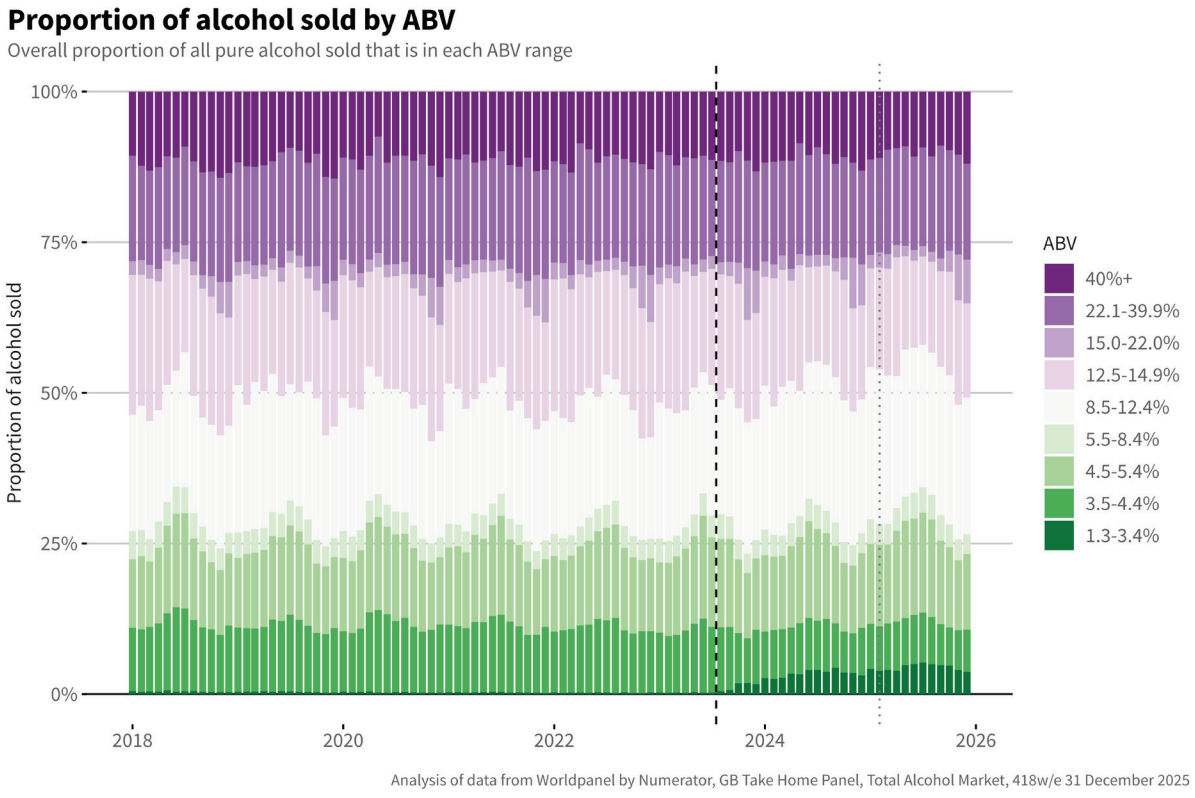
Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Changes in the distribution of product ABVs

As for our analyses of price, beyond looking at trends in the average ABVs, it is also informative to look at the proportion of alcohol products and alcohol sales that come from different ABV bands. Unweighted figures, showing changes in the proportion of products available for sale at different strengths are presented in Figures A15 and A16. We focus here on weighted analyses showing the proportion of alcohol sold by ABV.

Overall ABV distribution of alcoholic products (weighted)

Plotting the proportion of all alcohol sold by strength band shows that roughly half of all alcohol is sold at 12.5% ABV or higher. There is a clear seasonal pattern, with greater sales of higher-strength products, particularly in the 15-22% ABV range in the run up to Christmas, and greater sales of lower-strength products, particularly in the 4.5-5.4% ABV range, in the summer months. In terms of trends, the emergence from almost nothing of the 1.3-3.4% ABV band following the duty reforms is particularly striking, growing from almost nothing to 4% of all alcohol sold in 2024/25 (Figure A17). There is also some evidence of growth in the share of the alcohol market in the 8.5-12.4% ABV range (up from 20% of alcohol sold in 2022/23 to 23.7% in 2024/25) and a reduction in the 12.5-14.9% ABV range (down from 19.9% in 2022/23 to 16.8% in 2024/25).



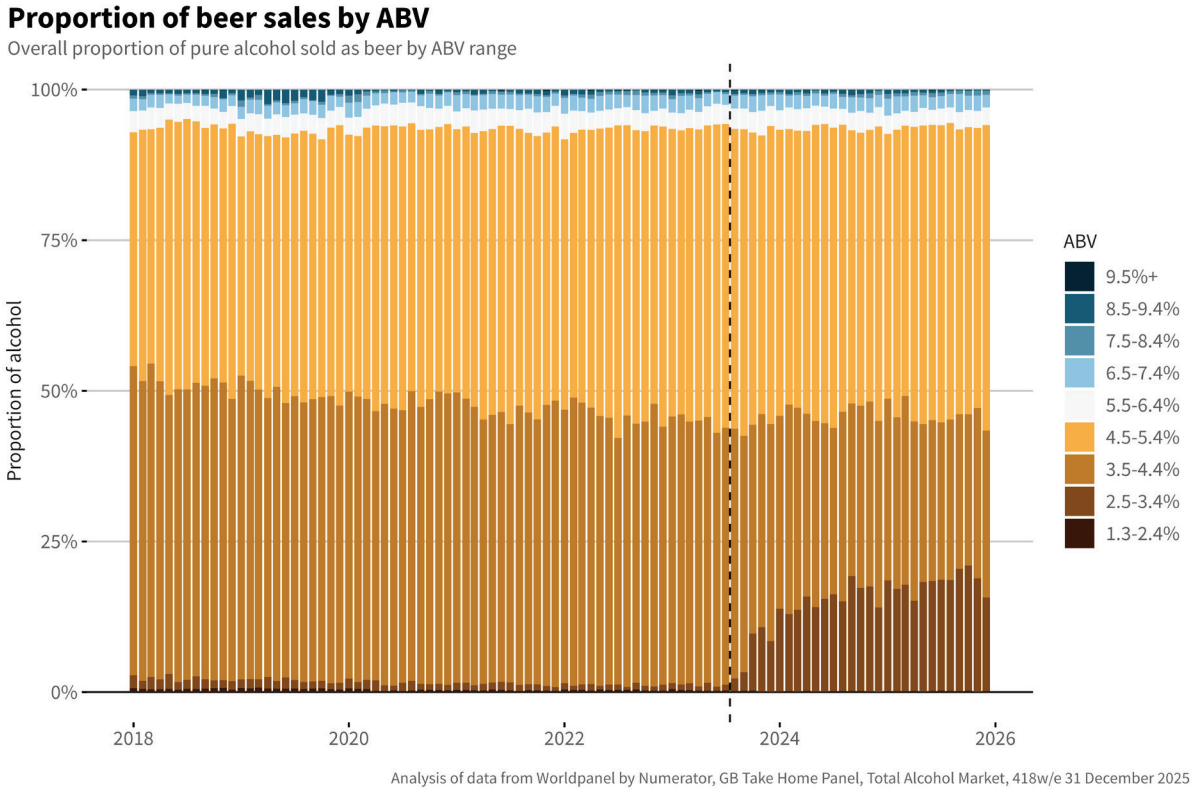
Additional figures showing trends in the 10th, 50th (median) and 90th percentiles of the ABV distribution, overall and by drink type are presented in Figures A18-A21.

Changes in the ABV distribution by drink type

As different types of alcohol have different typical ABV ranges, it may be informative to further explore these recent shifts in the distribution of ABVs in the alcohol market by product type, with more detailed ABV bands for each product. We focus here on the distributions weighted by alcohol sales volumes - unweighted versions can be found in Figures A22-A26.

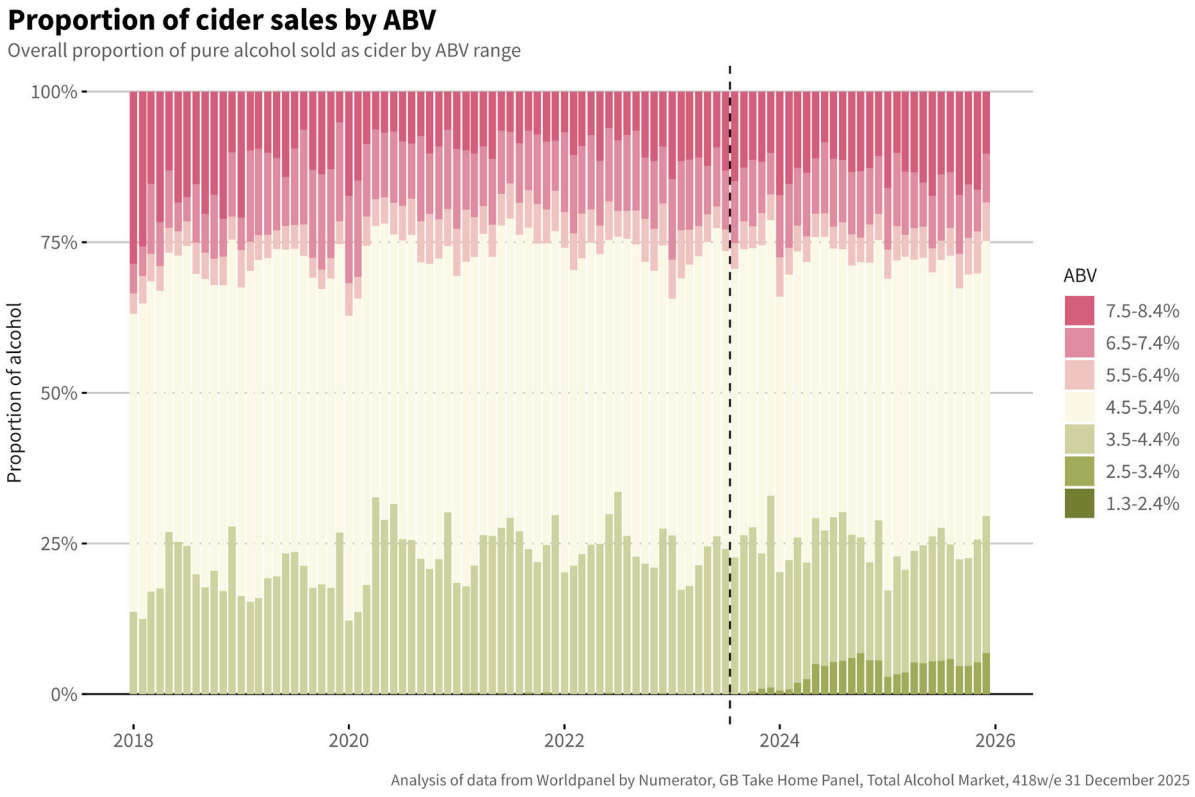
The distribution of beer sales by ABV (weighted)

Analysis of the proportion of alcohol in beer sold by ABV band shows the substantial growth of the 2.5-3.4% ABV beer market following the duty reforms, with products in this range representing around one fifth of alcohol sold as beer in 2025. This growth appears to have come entirely at the expense of 3.5-4.4% ABV beer. This follows the shift in the duty reforms of the lower-strength beer threshold from 2.8% to 3.5% ABV. However, the concurrent increase in the higher-strength beer threshold from 7.5% to 8.5% ABV does not appear to have been followed by any change in the relative market share of beers around this threshold.



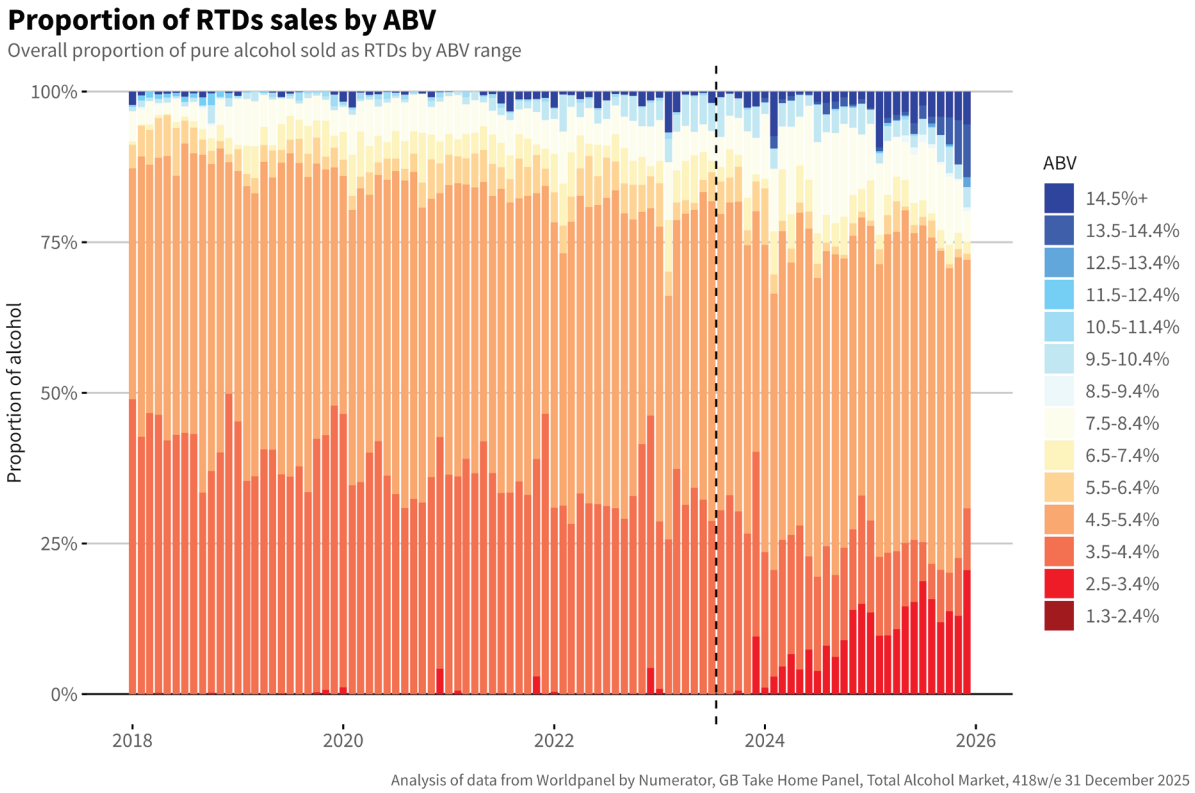
The distribution of cider sales by ABV (weighted)

The relative distribution of alcohol-weighted cider sales by ABV shows a similar, although smaller, growth in lower-strength cider sales between 2.5-3.4% ABV at the apparent expense of 3.5-4.4% ABV products. There is also a suggestion of growth in the proportion of alcohol being sold as cider in the 7.5-8.4% ABV range, and a corresponding reduction in sales in the 6.5-7.4% ABV range. The reasons for this increase are unclear as the duty reforms increased the rate of duty payable per unit of alcohol for all cider above 4.2% ABV.



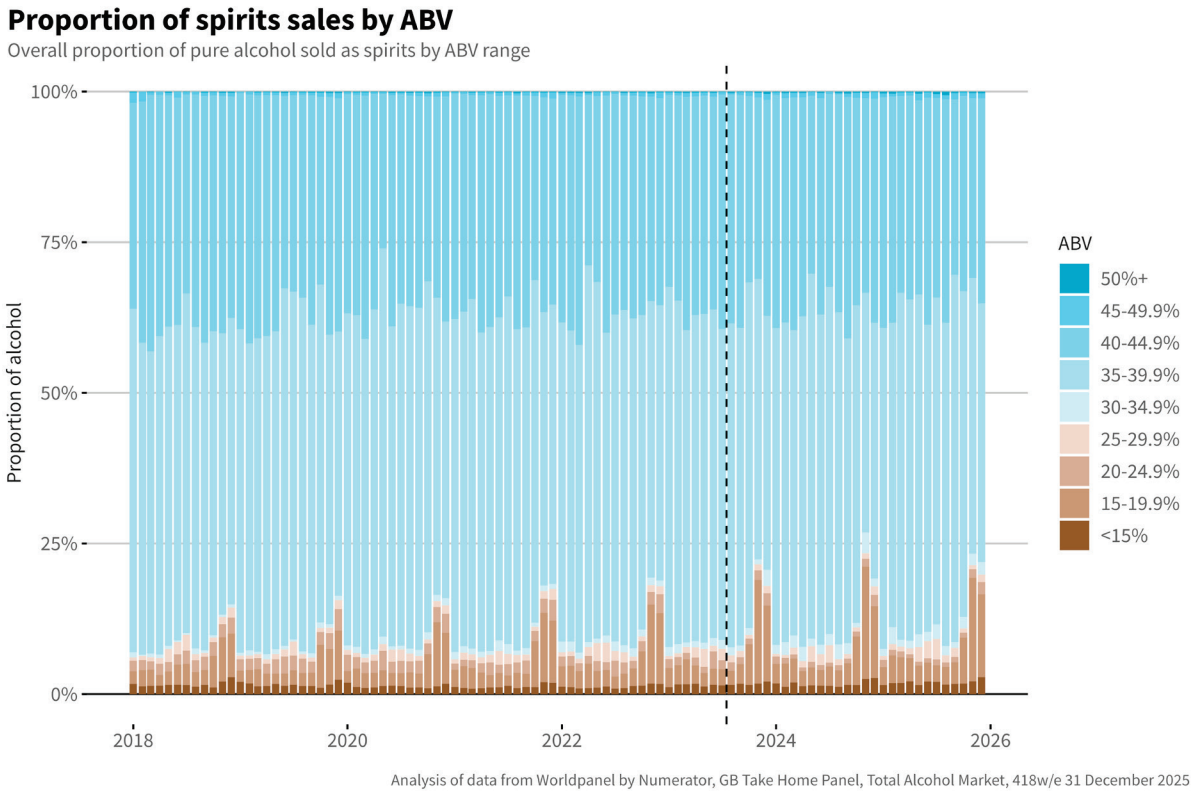
The distribution of RTD sales by ABV (weighted)

Several patterns are evident in the alcohol sales volume weighted distribution of RTD ABVs. Firstly, there has been a longer-term shift towards higher-strength RTDs, with the proportion of alcohol sold as RTDs coming from products below 4.5% ABV falling steadily since 2018. Since the duty reforms, there has been substantial growth of the 2.5-3.4% ABV RTD market, with this surpassing the 3.5-4.4% ABV range in 2025 in terms of alcohol sales volumes. Finally, 2025 has seen clear growth of the high-strength RTD market - products above 13.5% ABV, although this remains small in absolute terms.



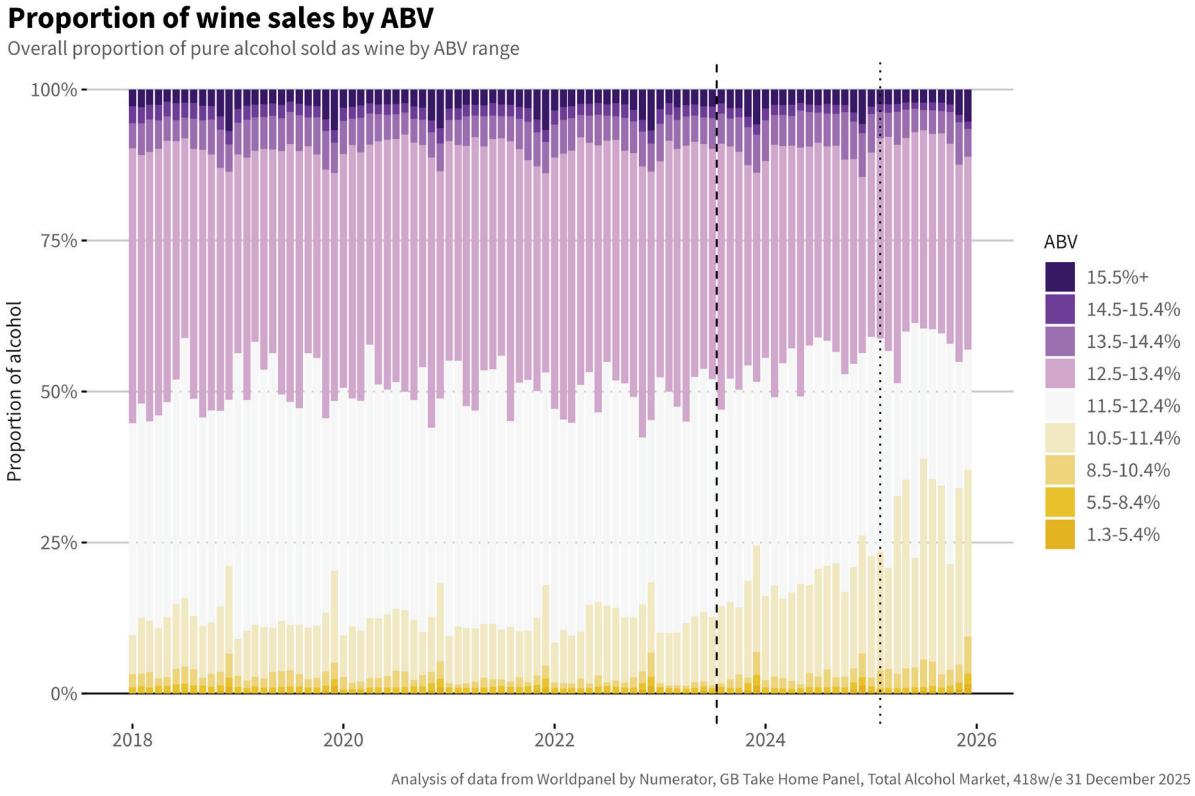
The distribution of spirits sales by ABV (weighted)

The ABV distribution of spirits sales is very stable over time, with the only change being a gradual increase in the proportion of alcohol sold as spirits that comes from lower-strength spirits (below 25% ABV), such as liqueurs, in November and December each year. This trend pre-dates the duty reforms.



The distribution of wine sales by ABV (weighted)

Finally, the alcohol sales-weighted distribution of wine ABVs shows little change between 2018 and the duty reforms, but following the reforms we have seen a rise in the proportion of alcohol sold in wine at 10.5-11.4% ABV and a fall in the proportion sold in the 12.5-13.4% ABV range. These changes began around the time of the August 2023 reforms, but there is also a suggestion of further increases in the 10.5-11.4% ABV range following the removal of the 'wine easement' in February 2025. The shift in the unweighted distributions (Figure A26) are much less pronounced, suggesting that these trends are being driven to a greater extent by consumers shifting purchasing from higher- to lower-strength wines, rather than by either reformulation of existing products, or a reduction in the number of higher-strength wines and corresponding increase in the number of lower-strength wines.



Section 3: The relationship between ABV and price

This section looks at the intersection between trends in prices, as examined in Section 1, and trends in ABVs, as examined in Section 2. This is of particular interest from a public health perspective as the heaviest drinkers tend to consume more high-strength, low-price alcohol (Black et al. 2014; Sheron et al. 2014; Holmes et al. 2014).

Comparing product ABVs with mean prices

The first step in exploring this intersection between high ABVs and low prices is to assess the association between the two. There are many ways that this could be done. Figure A27 shows a simple scatter plot of ABV against price, for the 12 months before and after the duty reforms, with a smoothed trend line overlaid. This suggests a complex relationship and it is hard to establish whether it has changed following the reforms.

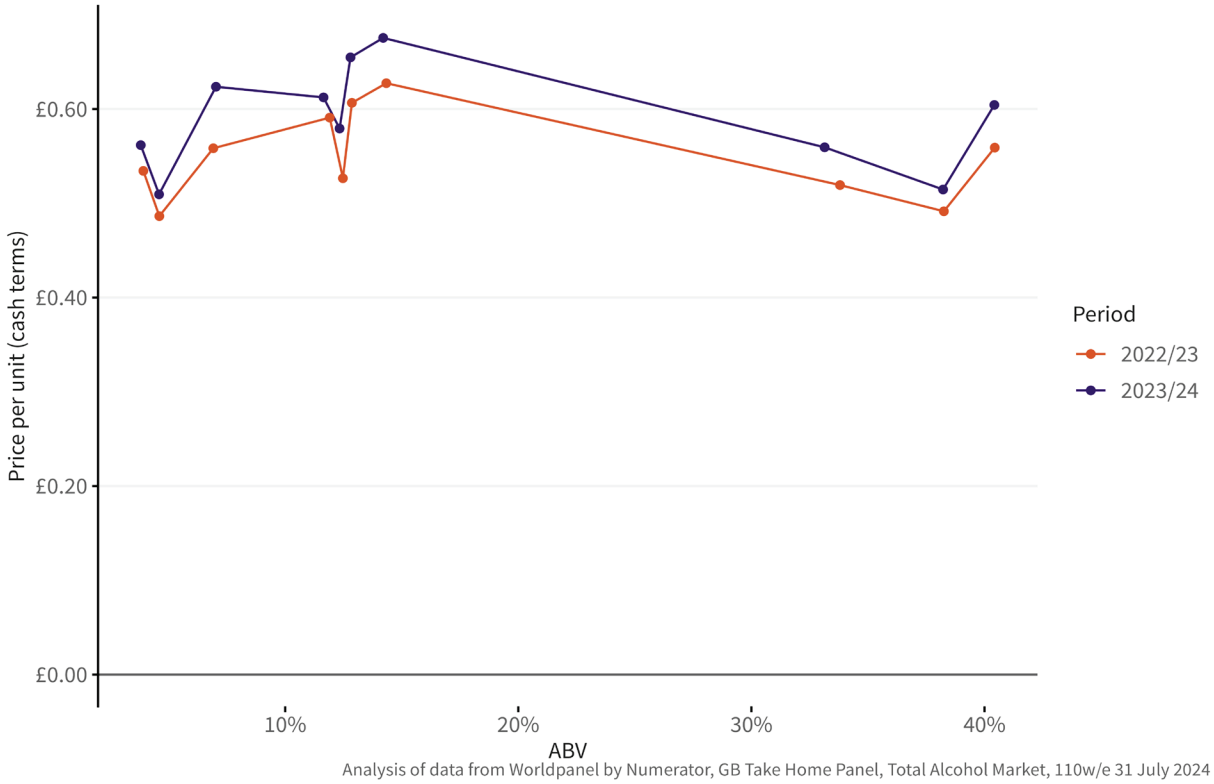
One way of simplifying this approach is to divide all products into deciles of the ABV distribution, within each time period, calculate the mean price and mean ABV within each decile in that period and then plot these against each other. Here a shift upwards in the points/line reflects an increase in price within an ABV range and a shift left or right in the points reflects a decrease, or increase in average ABVs.

As we would expect, these lines closely mirror the lines of best fit from the scatter plot but the between-year trend can be discerned more easily. This shows the generally higher prices in 2023/24 compared to 2022/23 across the whole ABV spectrum.

One advantage of this approach is that it is possible to weight the analysis by alcohol sales volumes (both in terms of defining the deciles and calculating mean prices within them). This weighting introduces clear dips in the mean price paid at the ABV ranges typical of beer (4-5%), wine (11-15%) and spirits (35-40%). These dips being more pronounced in the weighted, as opposed to unweighted, figures suggests that there are at least some products in these ABV ranges that have both lower prices per unit and higher sales volumes than the typical product of that ABV. An unweighted version of this figure is shown in Appendix Figure A28.

Price per unit vs. ABV for all alcohol (weighted)

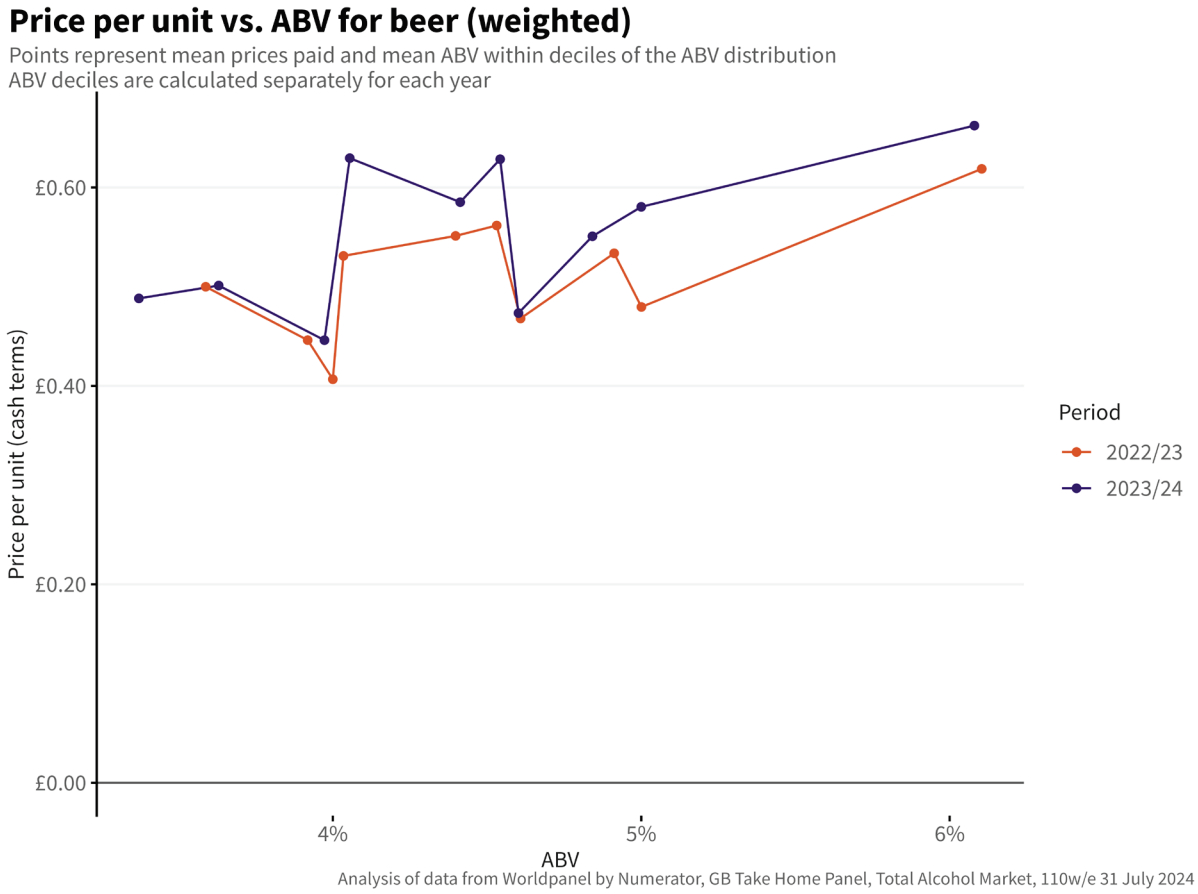
Points represent mean prices paid and mean ABV within weighted deciles of the ABV distribution
ABV deciles are calculated separately for each year



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

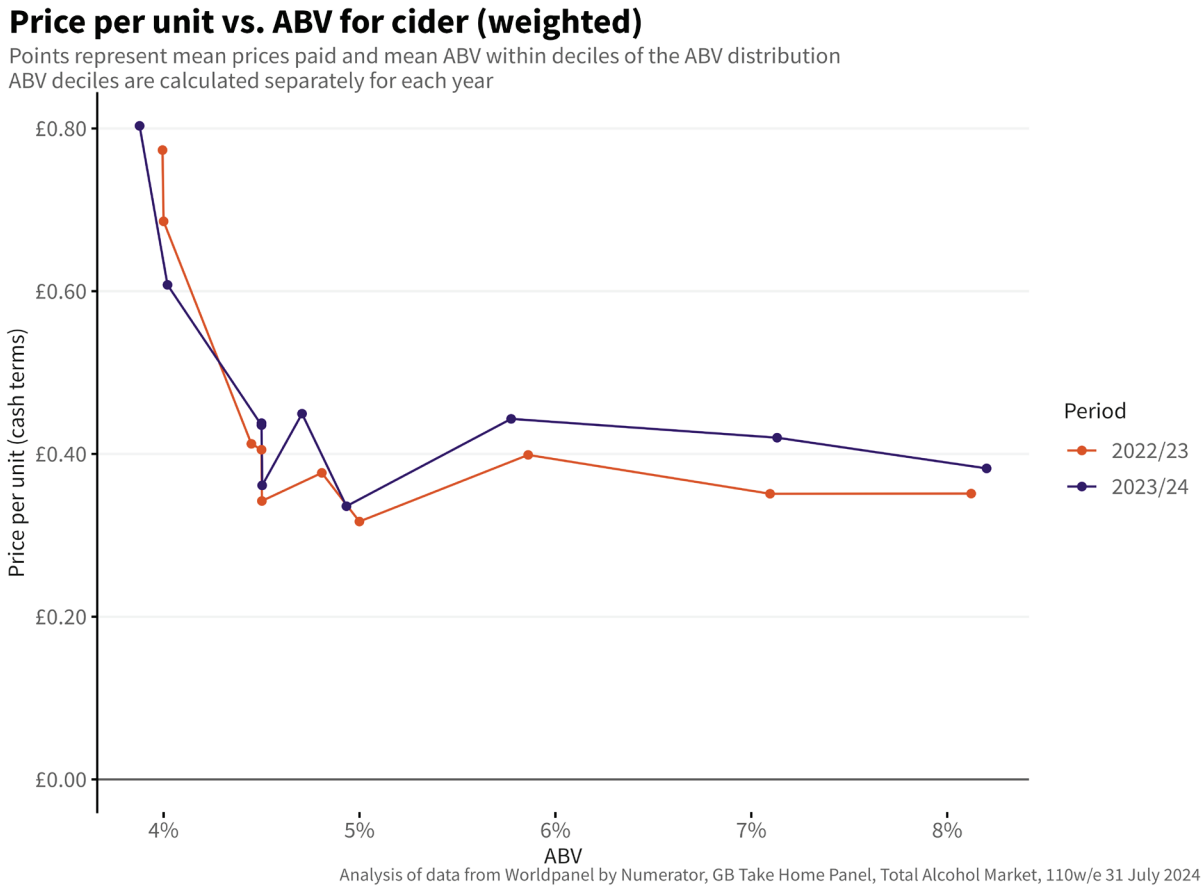
Price per unit vs. ABV for beer

We focus here on the alcohol sales-weighted figures - scatter plots and unweighted versions can be found in Appendix Figures A29-A38. The association between price per unit and ABV shows clear dips in price at strengths of around 3.9% and 4.6%, as well as notably smaller price increases following the duty reforms at these strengths compared to products with ABVs of 4.0-4.5% or 4.8%+. There is also a clear drift downward in terms of the strength of the lowest ABV decile, suggesting a rise in sales for lower ABV beers following the reforms.



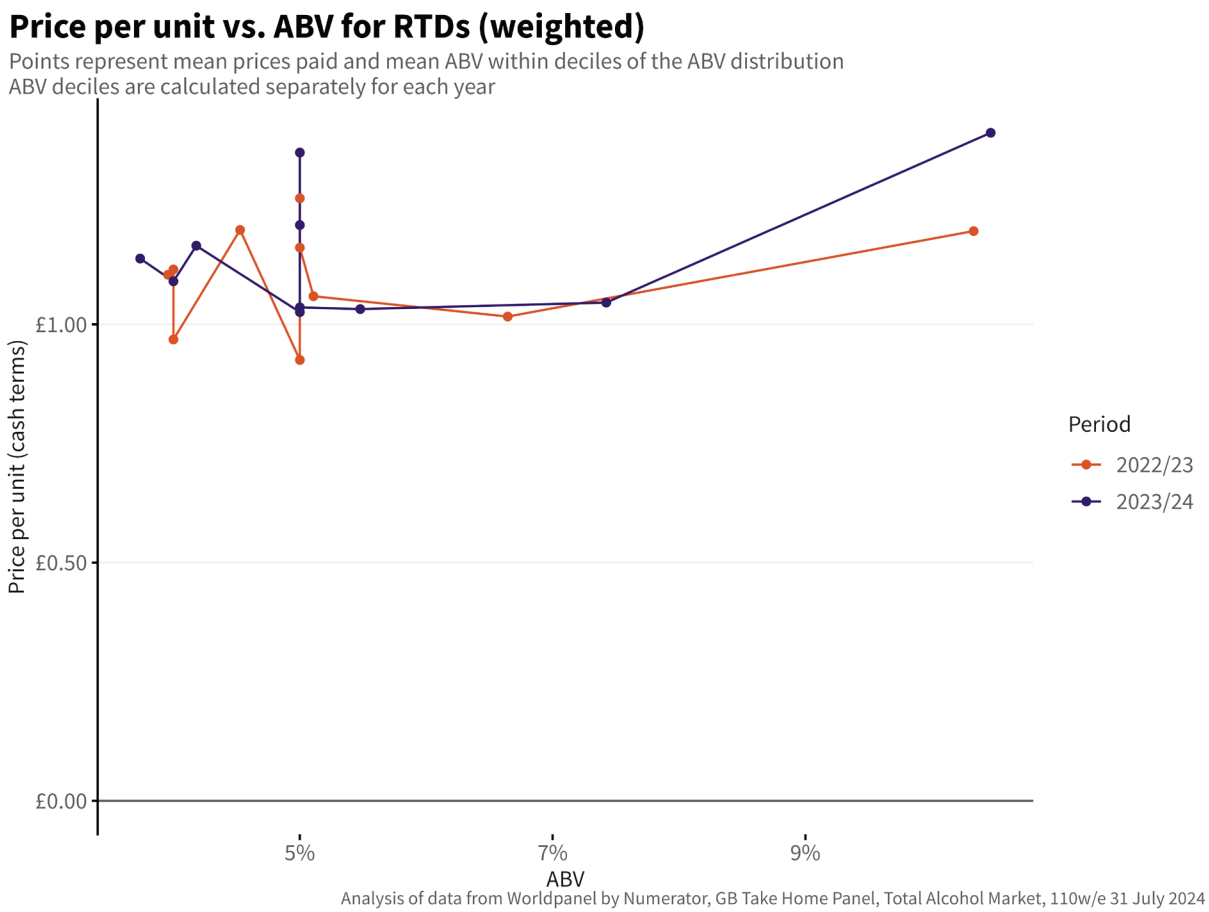
Price per unit vs. ABV for cider

Cider shows a clearer association between price and strength, with prices generally falling as ABV rises. Following the reforms, prices appear to have increased for stronger ciders, but not for lower-strength ciders below 4.5%.



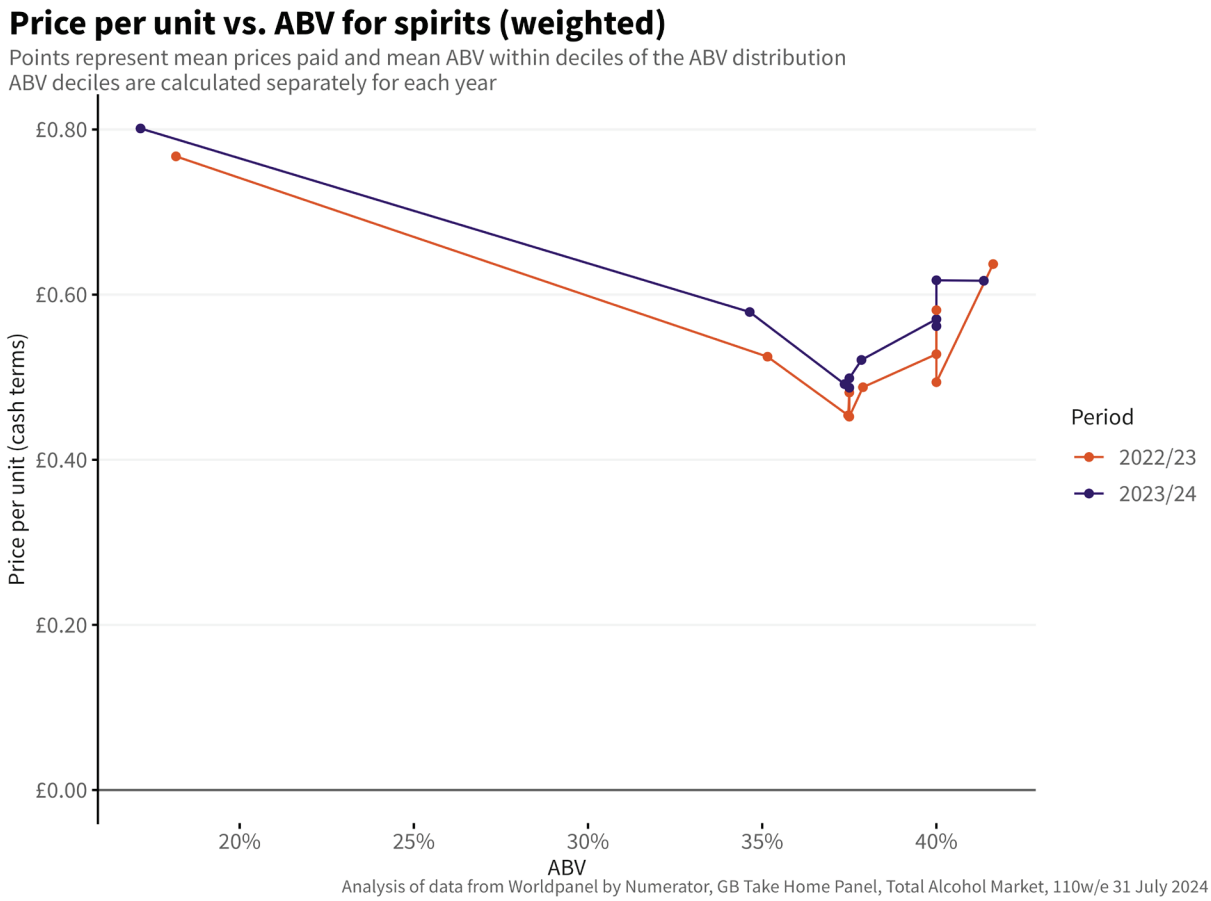
Price per unit vs. ABV for RTDs

The association between price and ABV for RTDs is harder to interpret due to the fact that the vast majority of products are 4% or 5%, although there is greater diversity in product ABVs following the reforms, with more higher- and particularly lower-strength RTDs in the market.



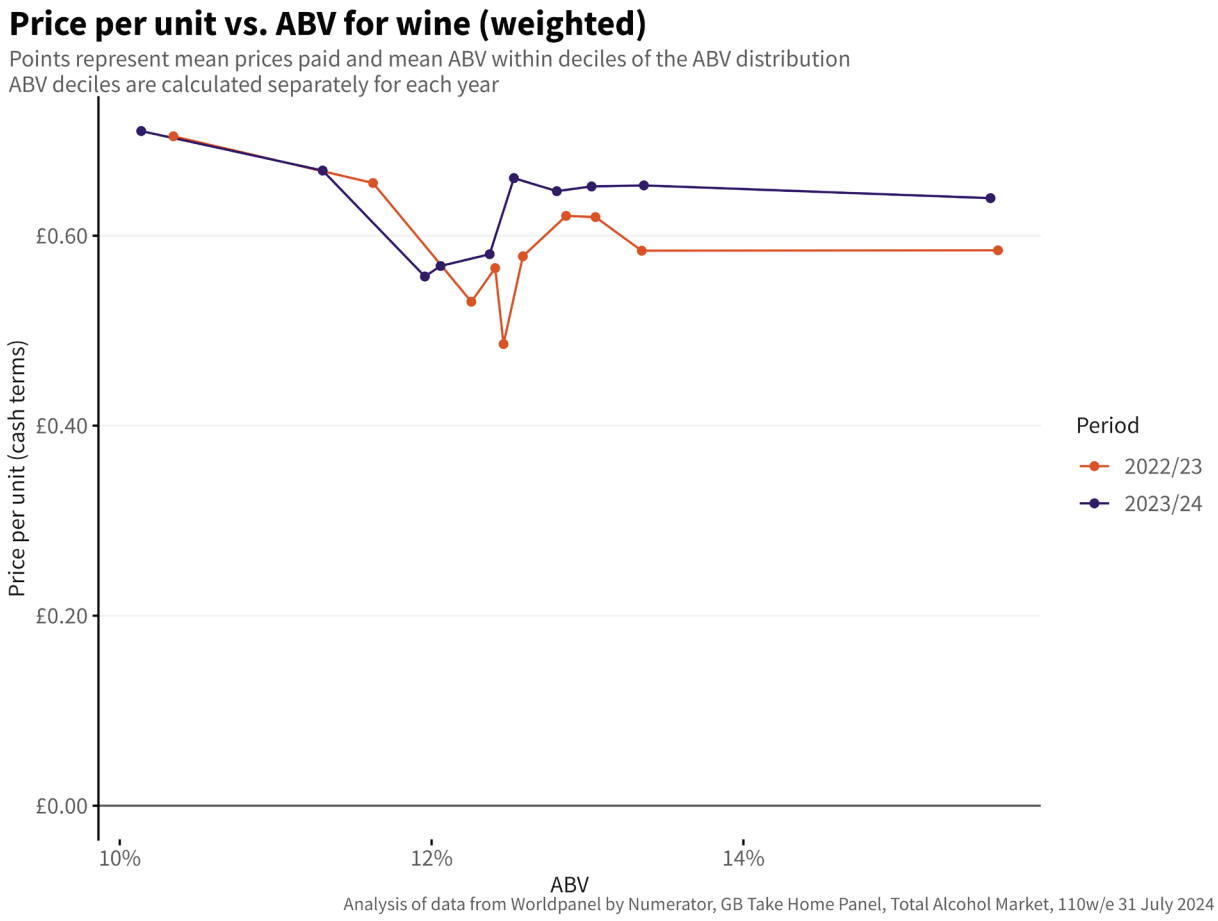
Price per unit vs. ABV for spirits

Spirits show a more interesting pattern, with prices per unit peaking at around 18% ABV, falling steadily to a minimum at 37.5% (corresponding with the strength of many spirits such as gin, rum and vodka) and then rising sharply past 40% (the minimum strength for whisky). This pattern has not obviously changed since the reforms, although spirits prices have risen across all ABVs.



Price per unit vs. ABV for wine

Finally for wine we see prices per unit fall as ABV increases up to 12.0-12.5%, where they are lowest, then rise and stabilise above 13%. Following the duty reforms this pattern remains, but prices have only risen at ABVs above 12%, while ABVs have fallen and prices remained at similar levels below this threshold.



The relationship between the price of high strength and 'standard' alcoholic products

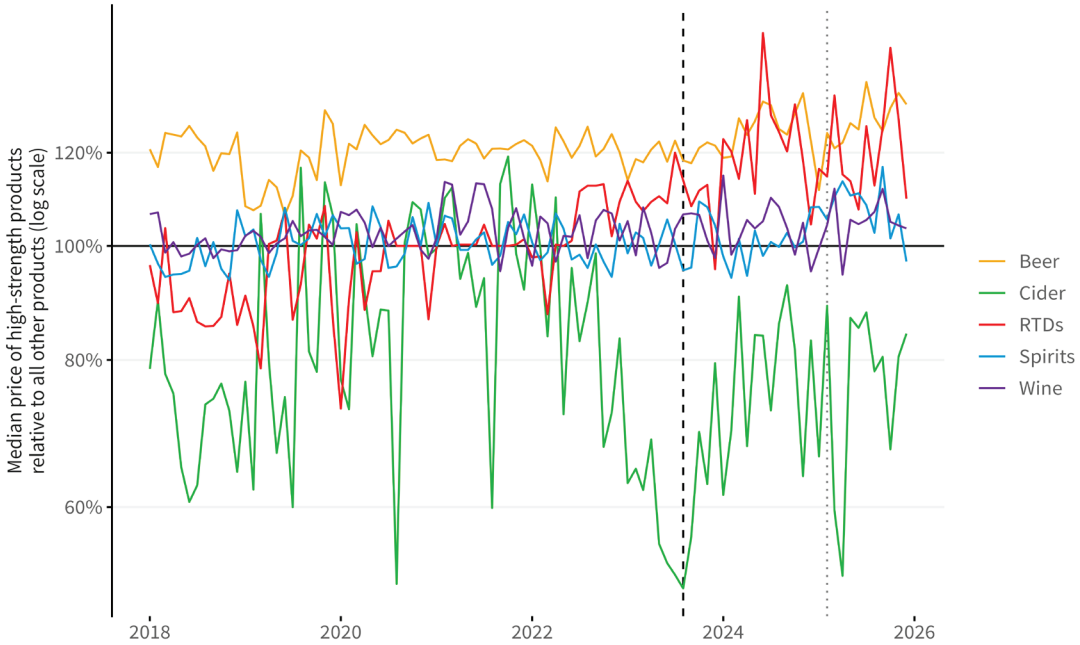
One approach to summarising the association between ABV and price that addresses the specific public health concern around higher-strength products is to look at trajectories in the price of the strongest products compared to the price of all other alcohol. Based on the weighted figures presented previously in this report, the 90th percentile of the ABV distribution has changed over time for most products, but has sat generally around 5.5% for beer, 7.5% for cider, 6.5% for RTDs, 40% for spirits and 13.5% for wine in the period prior to the duty reforms. We take products whose ABV is at or exceeds these cutoffs as being 'high-strength', retaining these same cut-offs across all time periods. We can then take the ratio of median prices for these products and for all other products whose ABV falls below these cutoffs. We refer to these other products as being 'standard-strength' for simplicity. Due to the cutoffs being different for each drink type, we do not present a combined analysis, only beverage-specific figures. The alcohol sales-weighted figure is below. An unweighted version is shown in Figure A39.

This figure illustrates that the price differential between the strongest alcohol and standard products is notably different for cider, where higher strength products have generally been cheaper compared to wine and spirits, where their prices are very similar, beer where higher-strength products have consistently been around 20% more expensive, and RTDs where the strongest products have shifted from being consistently cheaper than standard strength products in 2018 to the converse being true in 2025.

The trends are quite noisy and difficult to interpret as a result. However it does appear that the relative price of the strongest cider fell during 2022 compared to the price of standard-strength cider. This fall partially rebounded and then stabilised following the introduction of the duty reforms (which slightly increased the duty payable on stronger ciders). There is also a suggestion that the relative price of strong beer may have started to increase, compared to standard-strength beer, following the reforms, although the growth in the lower-strength beer market may be contributing to this.

Relative price of the strongest alcohol to other products (weighted)

Ratio of the mean price of 'high-strength' products compared to the mean price of all other products weighted by the volume of pure ethanol sold



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Section 4: The changing lower-strength market (1.3-3.4% ABV)

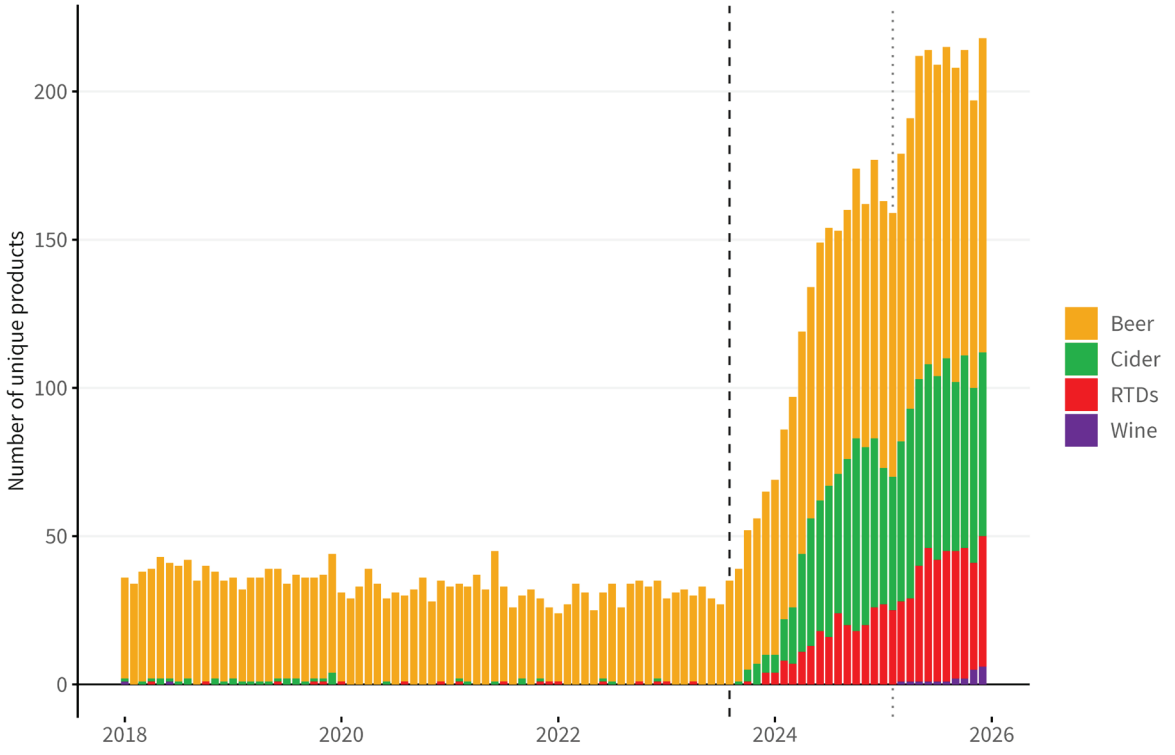
Finally, we analyse trends in the size of the lower-strength alcohol market. One aspect of the duty reforms was a change in the threshold at which a lower rate of alcohol duty applied, from 2.8% to 3.5% and an expansion in the applicability of this lower duty rate from only beer to all types of alcohol. This change was made with the explicit aim of encouraging producers to reformulate their products (HM Treasury and HM Revenue & Customs 2022). A recent study has found a substantial increase in this market for beer, suggesting the reforms have been successful in this aim (Angus et al. 2025). Here we expand this analysis to look at the number of products in this ABV range and at changes in this lower-strength market for other drink types beyond beer.

Count of lower-ABV products

Looking first at the number of products being sold at between 1.3 and 3.4% ABV, it is clear that prior to the duty reforms, there were a small number of products (fewer than 45 in any month), almost all of which were beers, being sold in this range. Since the reforms, the number of products below 3.5% ABV has risen dramatically, as well as diversifying across other drink types, with emerging lower-strength cider and RTD markets that barely existed prior to the reforms. Beer remains the largest contributor to the product count with 106 lower-strength beers recorded as being purchased in the WorldPanel data in December 2025. But there were also 62 lower-strength ciders and 44 lower-strength RTDs recorded as being sold in the same month.

Number of products between 1.3% and 3.4% ABV

Count of unique products sold in Great Britain with an ABV between 1.3% and 3.4%



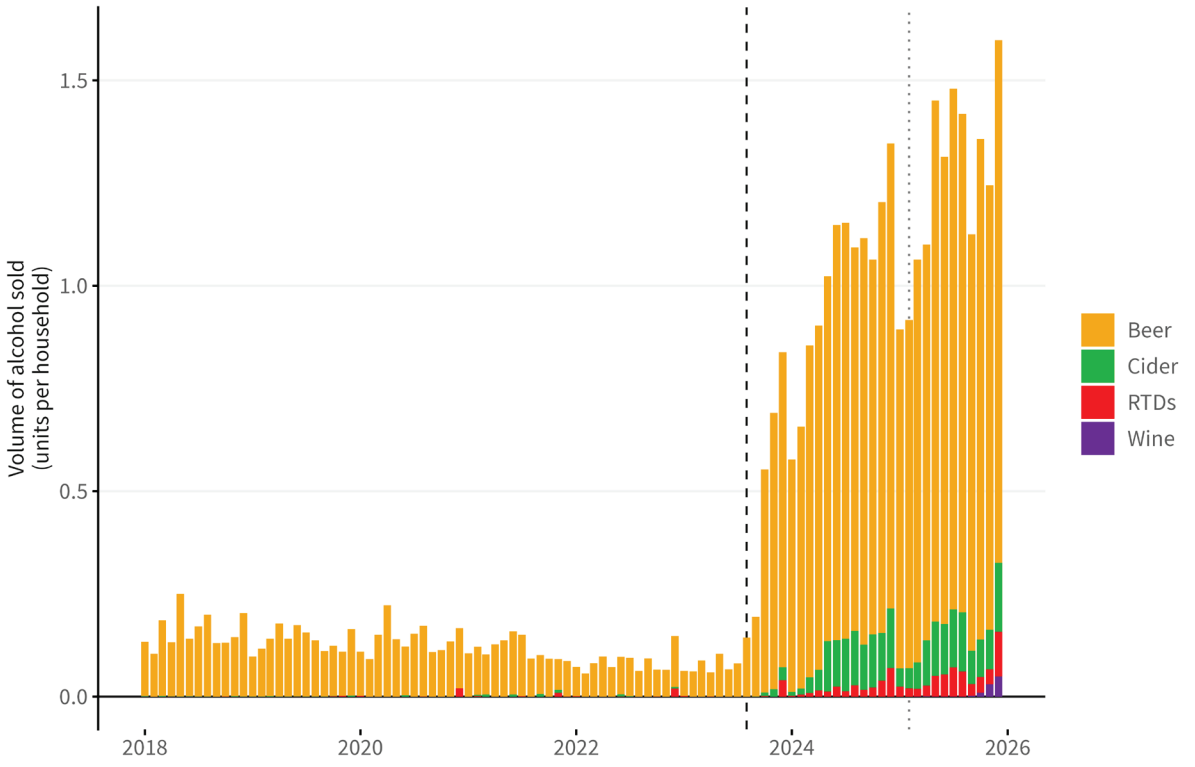
Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Alcohol volume sales of lower-ABV products

Switching from the count of unique lower-strength products to the volume of alcohol sold in this ABV range illustrates that the rise in volume sales is even greater than the rise in the number of products, increasing from an average of 0.02 units per household per month in 2022 to 0.29 units in 2025, a 15-fold increase. This also highlights the extent to which beer still dominates the lower-strength market in terms of alcohol sold, even as the number of lower-strength cider and RTD products has increased.

Volume of alcohol sold between 1.3% and 3.4% ABV

Mean number of units of pure alcohol purchased per household through 1.3%-3.4% ABV products



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Separating lower-ABV product growth into sales increases for existing products, new product launches since the duty reforms and reformulation from higher ABVs

The growth in the volume of lower-strength alcohol being sold since the duty reforms highlighted in the preceding graph could arise through several mechanisms. Firstly, sales of existing lower-strength products could have increased. Secondly, new lower-strength products could have been launched. Thirdly, existing higher-strength products could have reformulated to bring their ABV down to below the 3.5% level. Or some combination of these three factors.

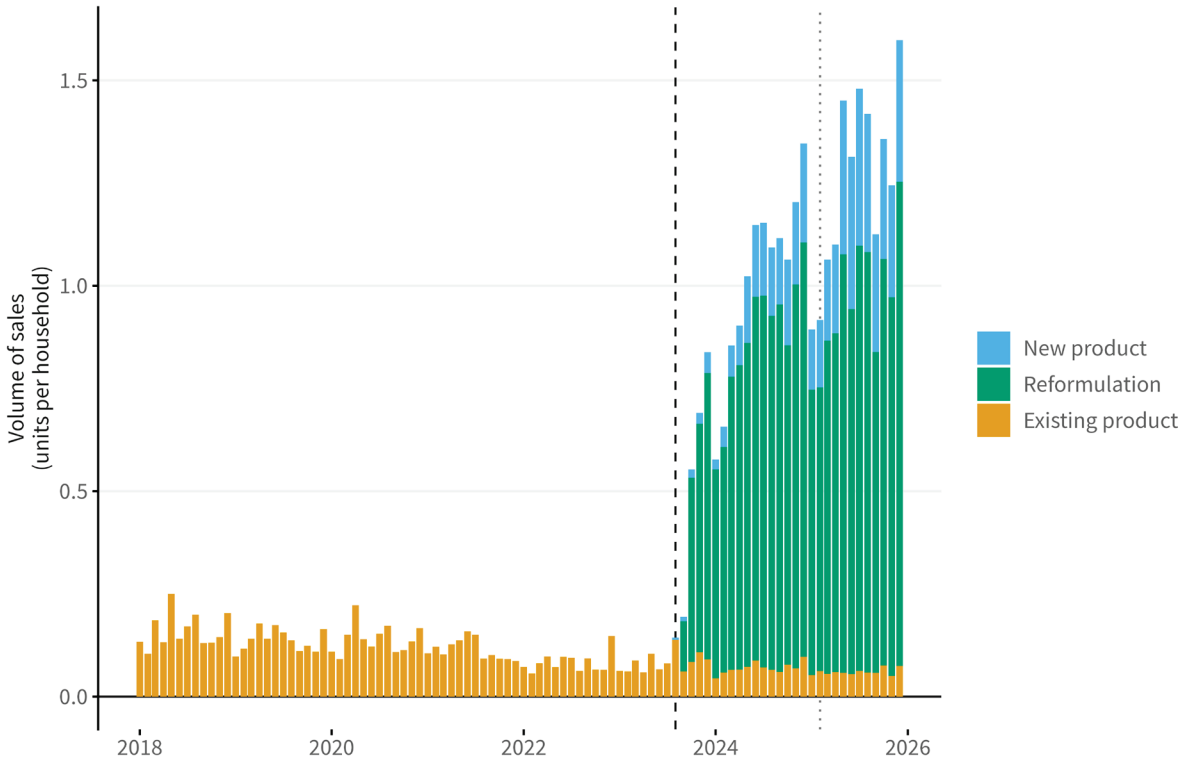
The Worldpanel data allows us to decompose the post-reforms market into these three categories - pre-existing lower-strength products, new products and reformulated products - to see what contribution each of these mechanisms makes to the overall growth of the market.

Alcohol volume sales

Weighted by alcohol sales volumes, we find that almost all of the growth in sales comes from reformulation. Across 2025, 72.6% of alcohol sales of lower-strength products came from products that had reformulated since the duty reforms in August 2023, compared to 22.6% from new products and 4.8% from products that were below 3.5% ABV before the reforms. Figure A40 illustrates the unweighted equivalent.

Volume of alcohol sold between 1.3% and 3.4% ABV

Mean number of units of pure alcohol purchased per household through 1.3%-3.4% ABV products



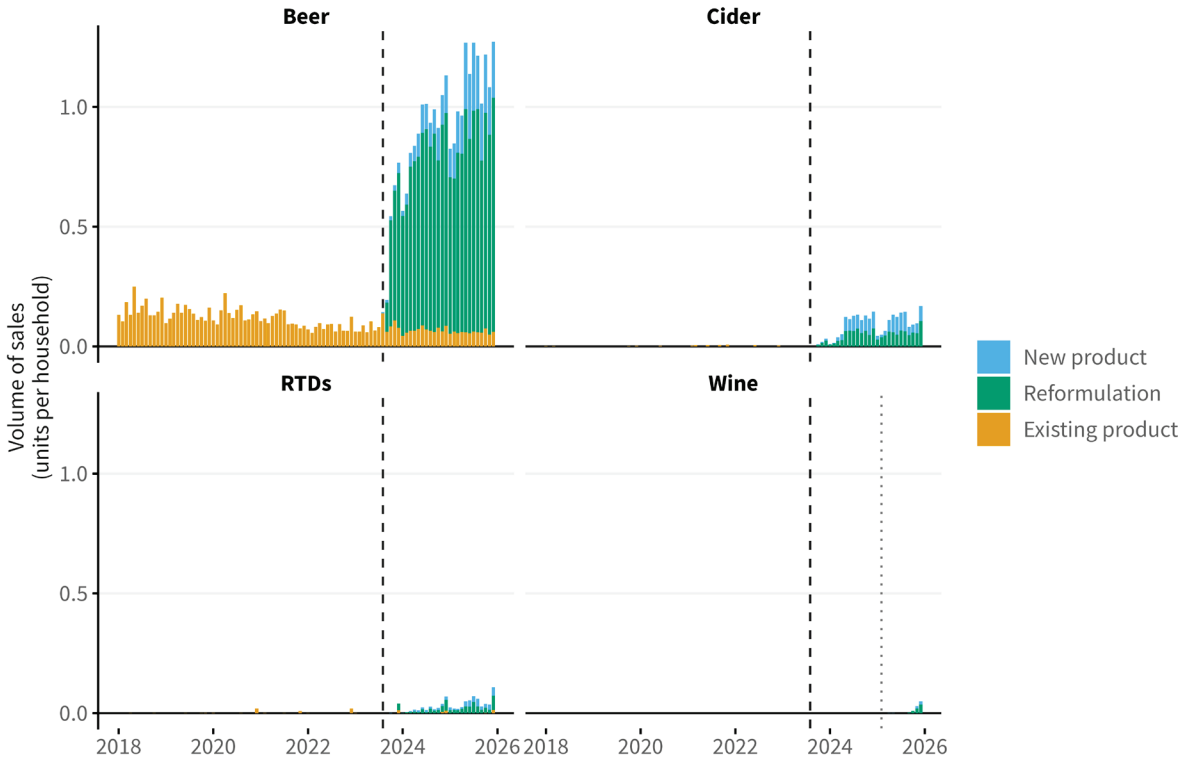
Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Alcohol volume sales by drink type

This lower-strength market is dominated by beer sales, which are overwhelmingly from reformulated products. However, the growth in lower-strength ciders and RTDs has come from a more even combination of new products and reformulations. An unweighted version of this figure is shown in Figure A41.

Volume of products sold between 1.3% and 3.4% ABV

Mean number of units of pure alcohol purchased per household through 1.3%-3.4% ABV products



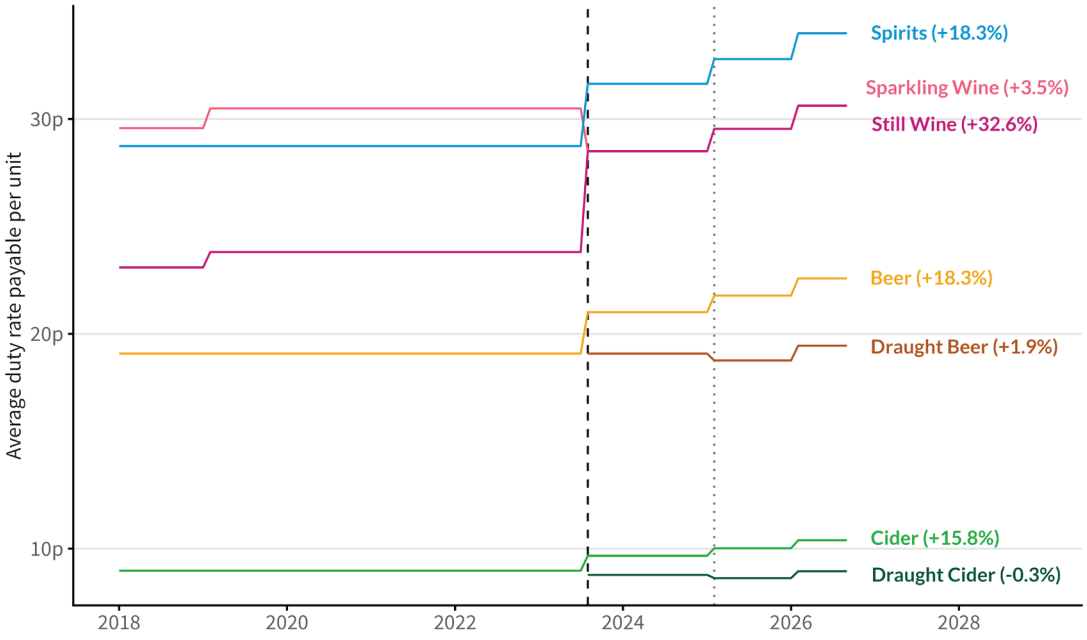
Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Trends in duty rates and product-specific inflation

Although the richness of the Worldpanel data allows us to explore detailed questions about how the alcohol market has changed in recent years, there are other sources we can turn to to corroborate and/or provide potential explanations for some aspects of our findings. In the case of trends in alcohol prices, changes in alcohol duty rates are not limited to the duty reforms, as data from HMRC on historic duty rates shows. The inflation-linked 10.1% increase in duty rates that accompanied the duty reforms in August 2023 increased duty rates for typical-strength products of all types, except for sparkling wines and spirits-based RTDs. Since the reforms, duty rates have been increased in line with inflation in February 2025 and 2026. This is in stark contrast to the period prior to the reforms, when only wine duties were increased between January 2018 and July 2023. Overall, excluding draught products and sparkling wine, beer and spirits duties are 18.3% higher than they were in 2018, cider duties are 15.8% higher and wine duties are 32.6% higher.

Alcohol duty rates (in cash terms) have risen since 2018

Mean alcohol duty payable per unit of alcohol before adjusting for inflation
Rates for wine and cider prior to the duty reforms assume typical ABVs of 12.5% and 4.5% respectively
Figures in brackets show changes since January 2018

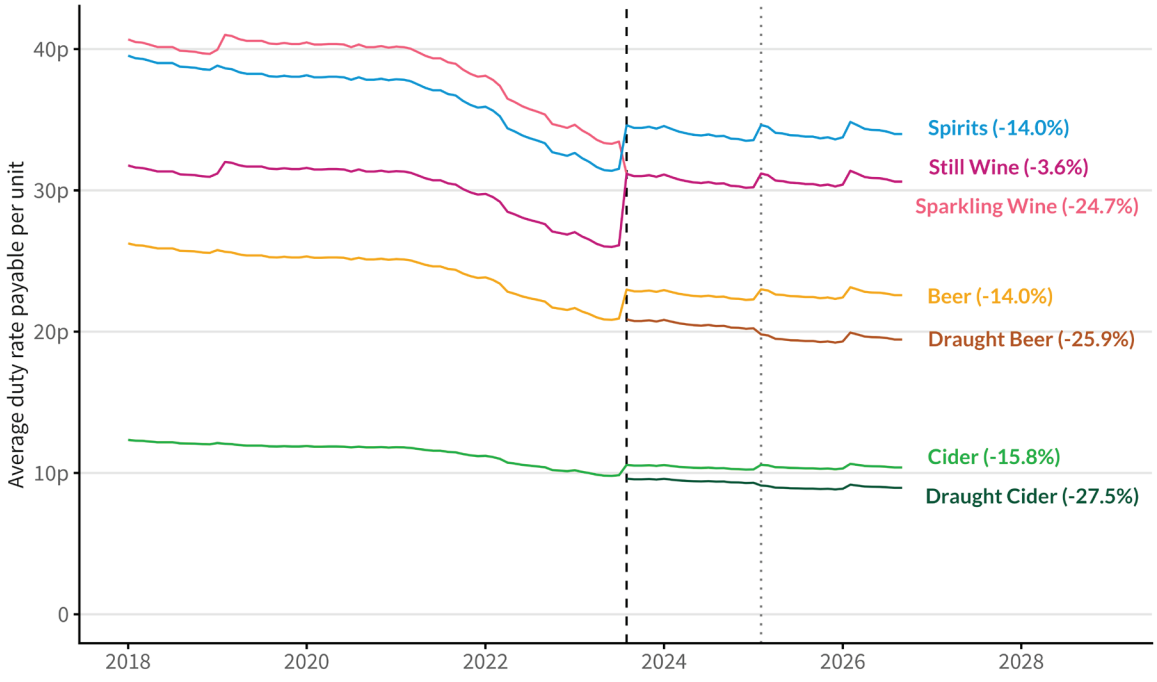


Data from HMRC, IFS, BBPA & HMT

The potential importance of these trends in alcohol duty rates becomes clearer when we adjust them for inflation. Low overall inflation from 2018-2021 means that the effective duty rate did not change much in spite of the lack of inflation-linked duty rises. However, the high rates of inflation that took place during the cost-of-living crisis from late 2021 onwards lead to a large real-terms fall in alcohol duty rates that the duty reforms did not fully reverse. As a result, duty rates for all products are currently at lower levels in real terms than they were at the start of 2018, ranging from 3.6% lower for still wine to 15.8% lower for cider and 24.7% lower for sparkling wine. This may help to explain at least some of the trends we observe in average real-terms alcohol prices, which have followed a similar trajectory over the same period.

Adjusting for inflation, duty rates have fallen since 2018

Mean alcohol duty payable per unit of alcohol, adjusted to August 2025 prices
Rates for wine and cider prior to the duty reforms assume typical ABVs of 12.5% and 4.5% respectively
Figures in brackets show changes since January 2018

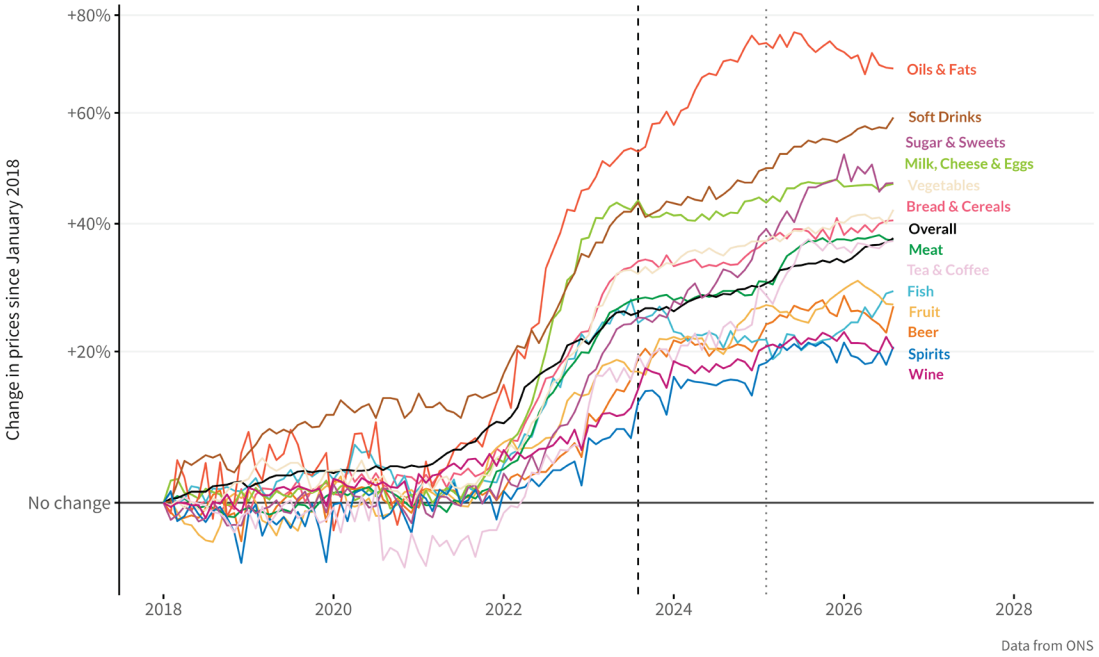


Data from HMRC, IFS, BBPA & HMT

These trends in inflation-adjusted alcohol prices can also be seen in category-specific inflation data published by the Office for National Statistics (Office for National Statistics, n.d.). Comparing the effective rates of inflation for beer, wine and spirits to other food and drink categories and to overall CPIH inflation (in black) it is striking that the three categories of alcohol had seen lower rates of overall inflation than any other category. In cash terms, beer prices have increased by 26.7% since January 2018 compared to overall CPIH inflation rising by 37.5%. Wine and spirits prices have increased by 20.3% and 20.7% respectively.

The price of alcohol has risen more slowly than any other food or drink category

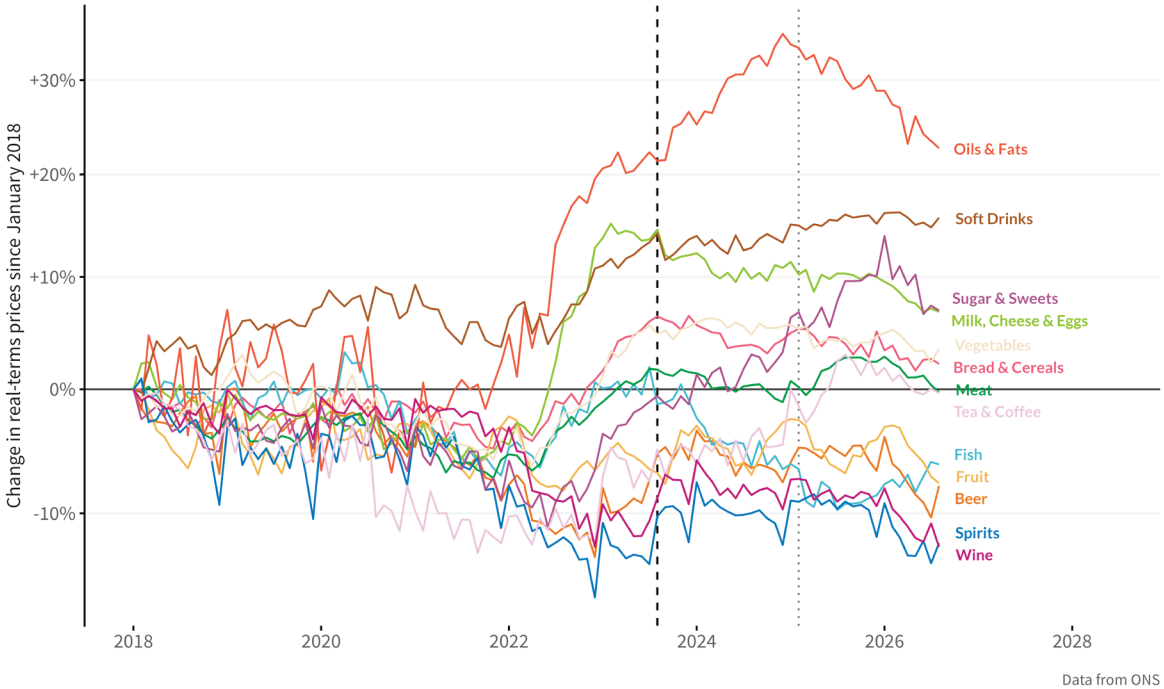
Category-specific inflation since January 2018 for food and drink items since January 2018



Another way of looking at this data is to adjust the category-specific inflation indices using overall CPIH inflation. This in effect gives you the relative change in price for each category after accounting for overall inflation. This shows that in real terms beer, wine and spirits prices have fallen by 7.9%, 12.5% and 12.2% respectively since January 2018. Over the same period, soft drinks prices have increased by 15.7%. This means that, although alcohol prices have increased in cash terms, relative to other products alcohol has become more affordable over time, particularly during the cost-of-living crisis. These findings align with the trends in the Worldpanel data analysed in this report.

The relative price of alcohol fell during the cost-of-living crisis

Relative change in prices compared to overall UK CPI inflation for food and drink items since January 2018



Conclusions

The analyses in this report show that alcohol prices have risen in cash terms, but fallen in real-terms (i.e. after adjusting for inflation) since 2018. This fall took place largely between late 2021 and early 2023 when inflation rates were highest during the peak of the cost-of-living crisis. We find some evidence of a small real-terms increase in the prices of wine, spirits and beer at the time of the duty reforms in August 2023, but the scale of this is small compared to the fall in prices in the preceding two years.

We find that alcohol sales are heavily concentrated in the cheapest products, particularly for beer and ciders, but this concentration does not appear to have changed following the duty reforms. There is mixed evidence about changes in the shape of the distribution of alcohol prices that suggest consumers have responded to the duty reforms by changing their purchasing behaviour. However, the nature of these responses is complex and includes consumers increasing or decreasing purchasing at various points in the price distribution, rather than a general shift towards or away from lower or higher cost products.

We have also found evidence that the average strength of alcohol sold appears to be falling since the duty reforms, driven by reductions in the average strength of beer and wines. These reductions are more obvious after weighting for alcohol sales volumes, suggesting that they are driven either by high-sales brands reducing their ABVs, or because consumers are switching to lower ABV brands. We find little evidence of consumers switching between alcohol categories (e.g. moving from beer to wine or vice versa).

The biggest change in the alcohol market since the duty reforms, or indeed at any point since 2018, is the substantial and rapid growth in the lower-strength beer market (2.5-3.4% ABV). This growth has come at the expense of products in the 3.5-4.4% ABV range and appears to have been driven largely by reformulation of existing brands, rather than the launch of new lower-strength products. The cider market has seen similar growth at lower ABVs, but this has come from a more equal combination of new product launches and reformulations.

There has been relatively little change in the strength of the spirits market, but the picture for RTDs is more complex, with a longer-term fall in sales of standard-strength (3.5-4.4% ABV) products, a notable increase in the lower-strength RTD market (2.5-3.4% ABV) following the duty reforms and a more recent rise in sales of higher-strength RTDs (13.5%+ ABV).

Finally, for wine, the market share of 12.5-13.4% ABV wines began to fall at the point of the duty reforms, rather than the point that the wine easement was removed. This is somewhat surprising, as duty rates on wines in this range increased after the end of the easement. There has also been considerable growth in the 10.5-11.4% ABV wine market, seemingly at the expense of 11.5-13.4% ABV wines.

Amongst these trends in prices and ABVs, the relationship between alcoholic strength and price is complex and varies substantially by beverage type and across the ABV range. There is little evidence that this relationship has changed following the reforms, except for the rise of lower-strength beers.

The analyses in this report are purely descriptive, and so cannot establish a causal relationship between the alcohol duty reforms and changes to the alcohol market. In many of the analyses in this report, it appears that high inflation rates and the cost-of-living crisis was associated with greater market changes, particularly prices. However, the scale and timing of the rise in the lower-strength beer market, particularly the fact that this coincided with the change in the lower-strength beer duty threshold, does suggest that the reforms have played a significant role in stimulating this growth.

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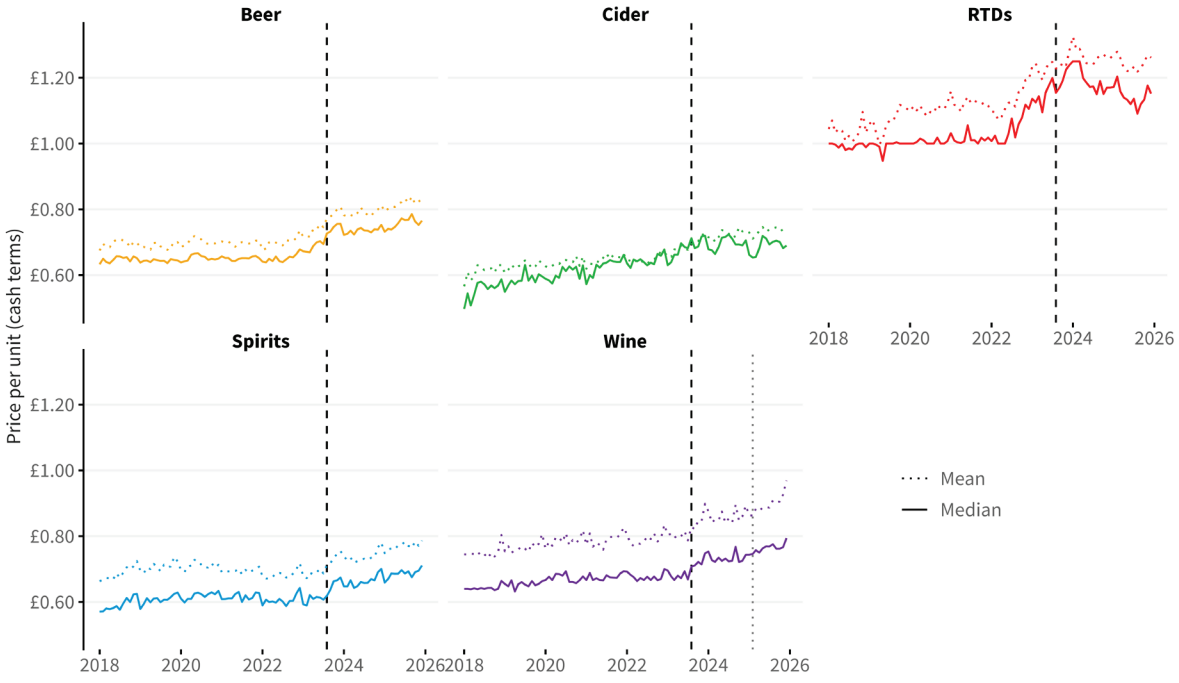
Appendix

Figure A1

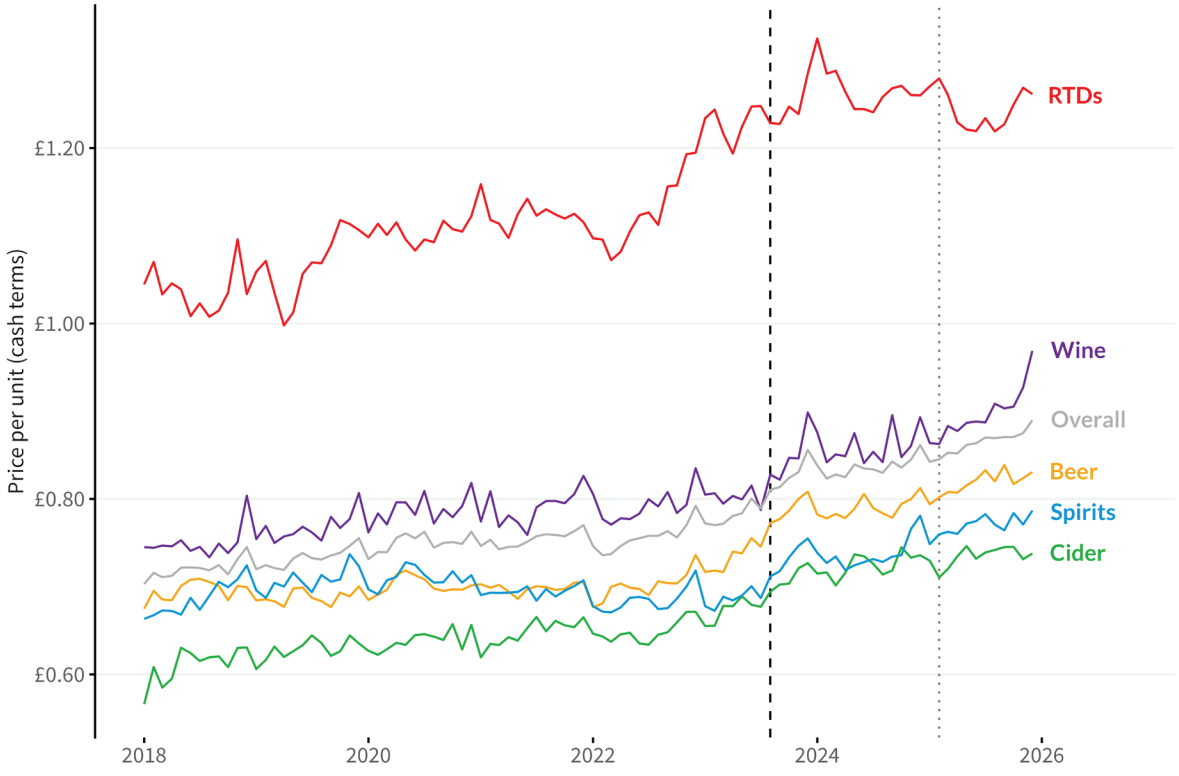
Average price of alcohol (unweighted)



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A2

Mean price of alcohol (unweighted)

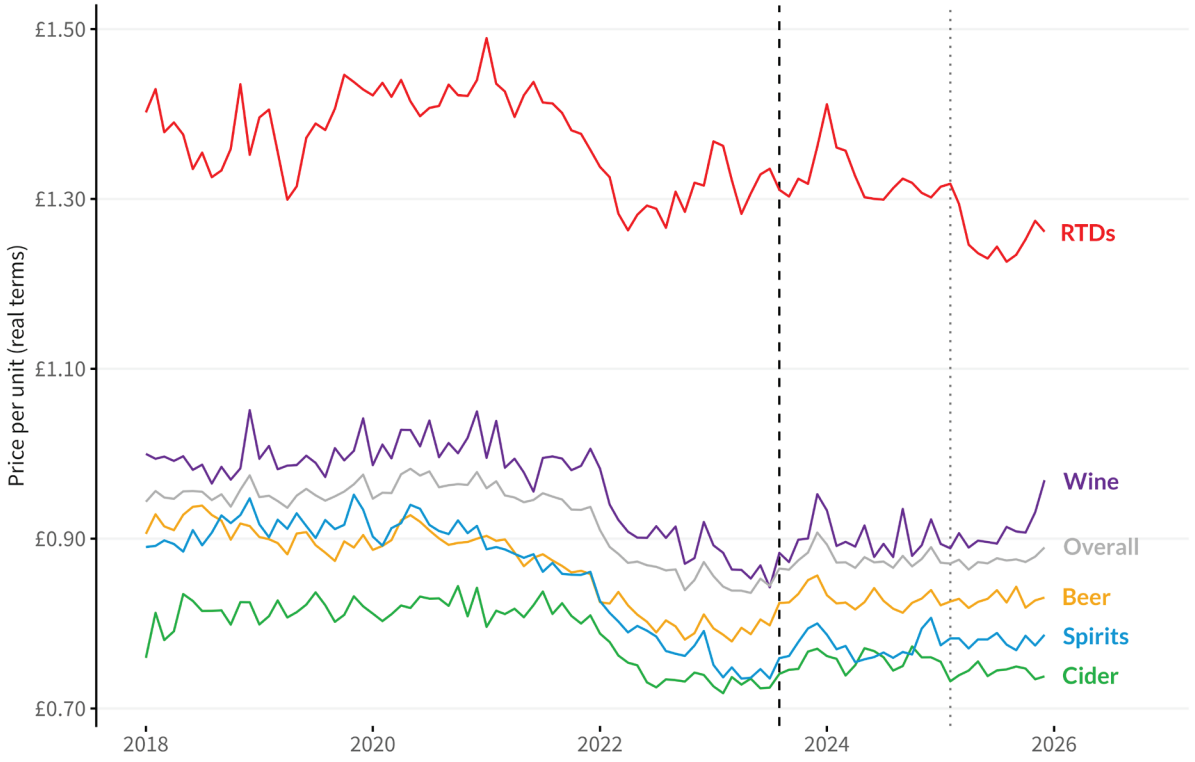


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A3

Mean real-terms price of alcohol (unweighted)

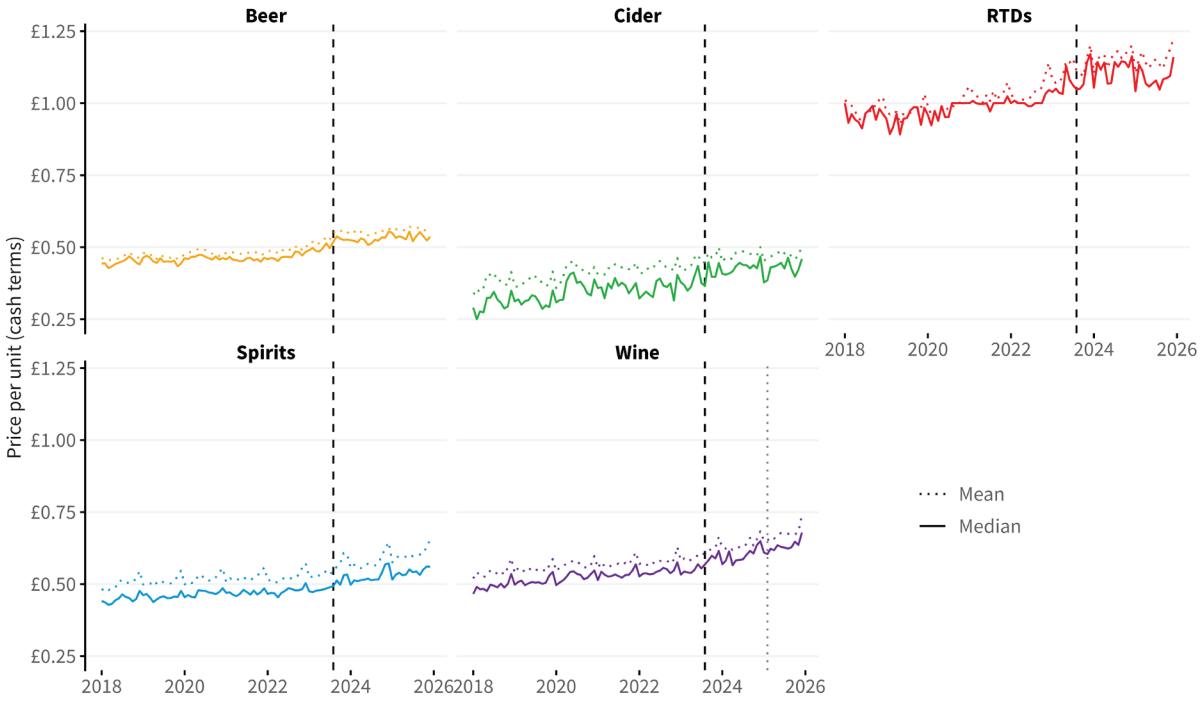
Prices adjusted to December 2025 values



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A4

Average price of alcohol (weighted)

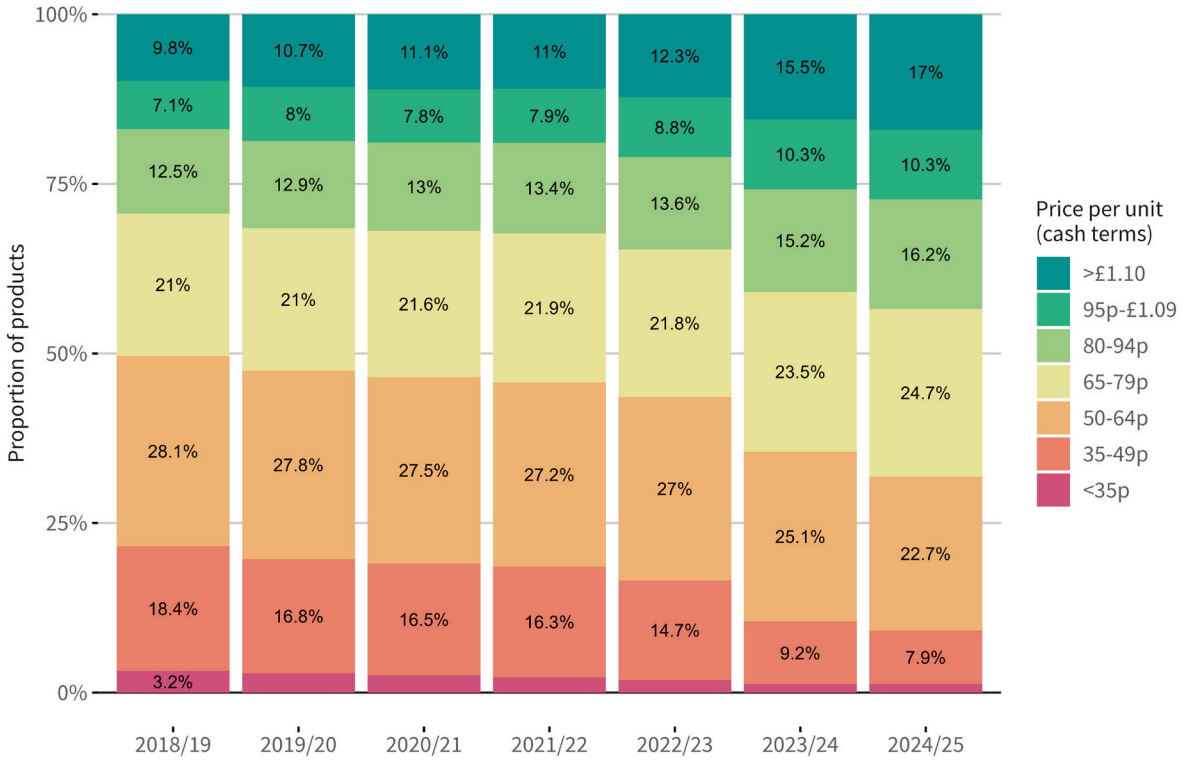


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A5

Proportion of alcohol products sold by price per unit

Proportions below 3% are not labelled

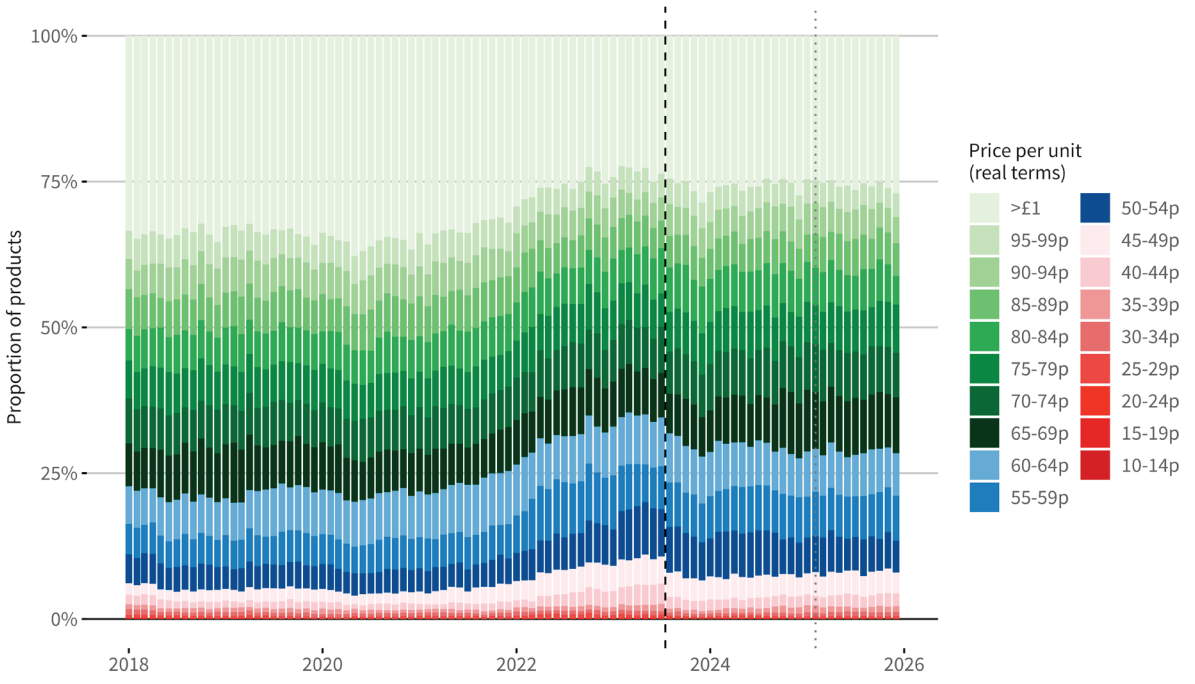


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A6

Proportion of alcohol products sold by real-terms price per unit

Prices adjusted to December 2025 values

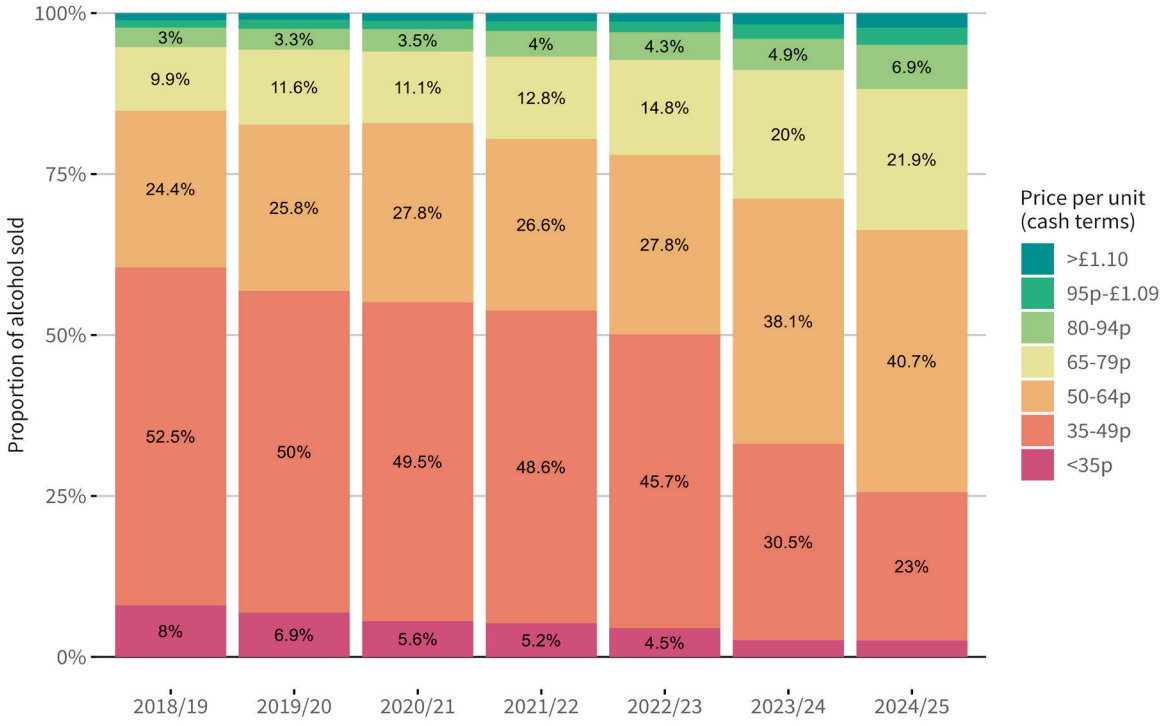


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A7

Proportion of alcohol sold by price per unit

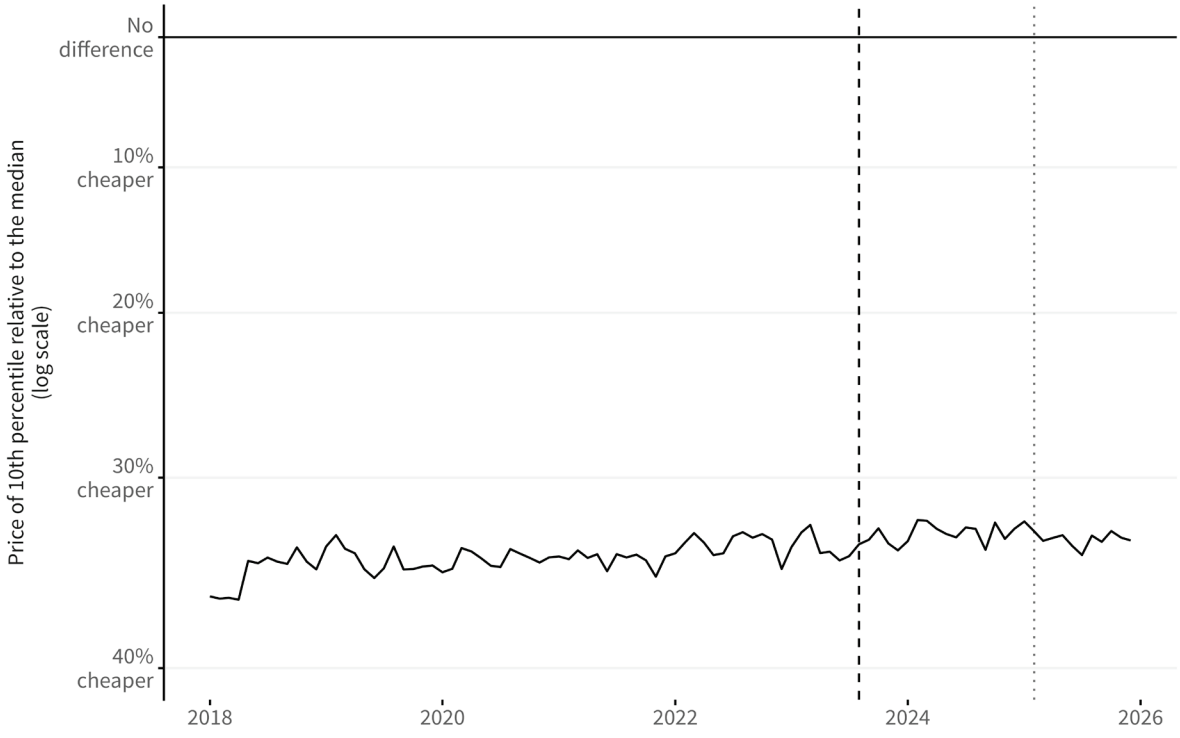
Proportions below 3% are not labelled



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A8

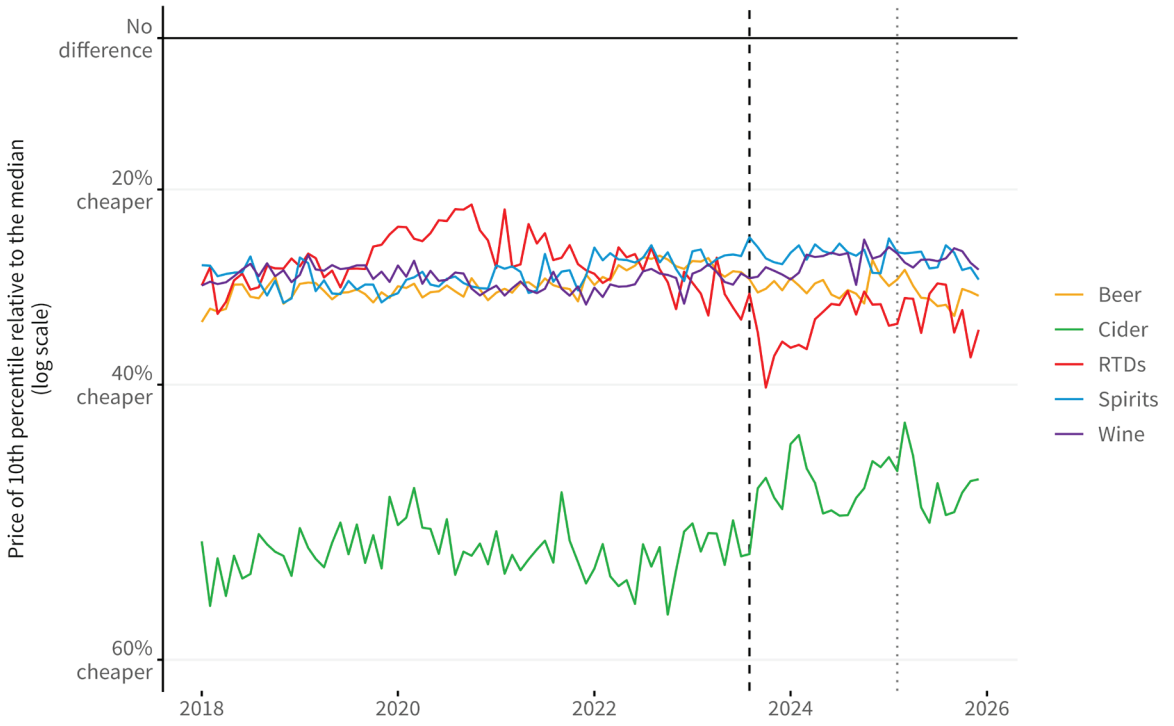
Relative price of the cheapest alcohol to the median (unweighted)



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A9

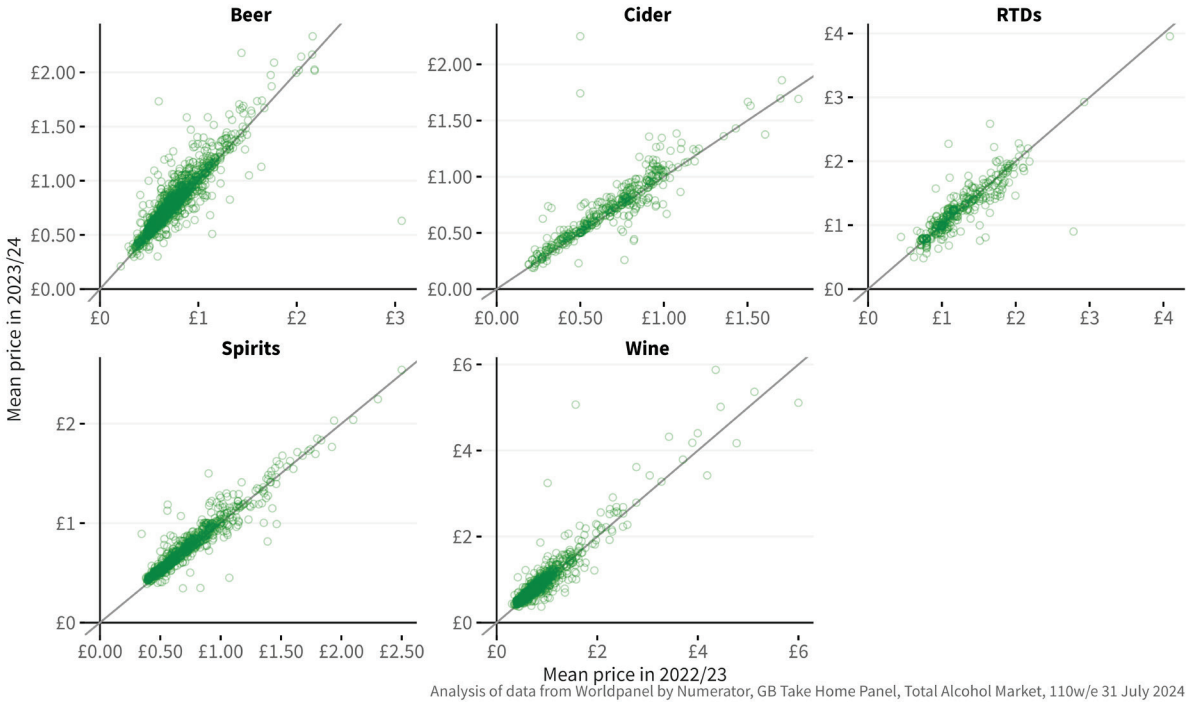
Relative price of the cheapest alcohol to the median (unweighted)



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A10

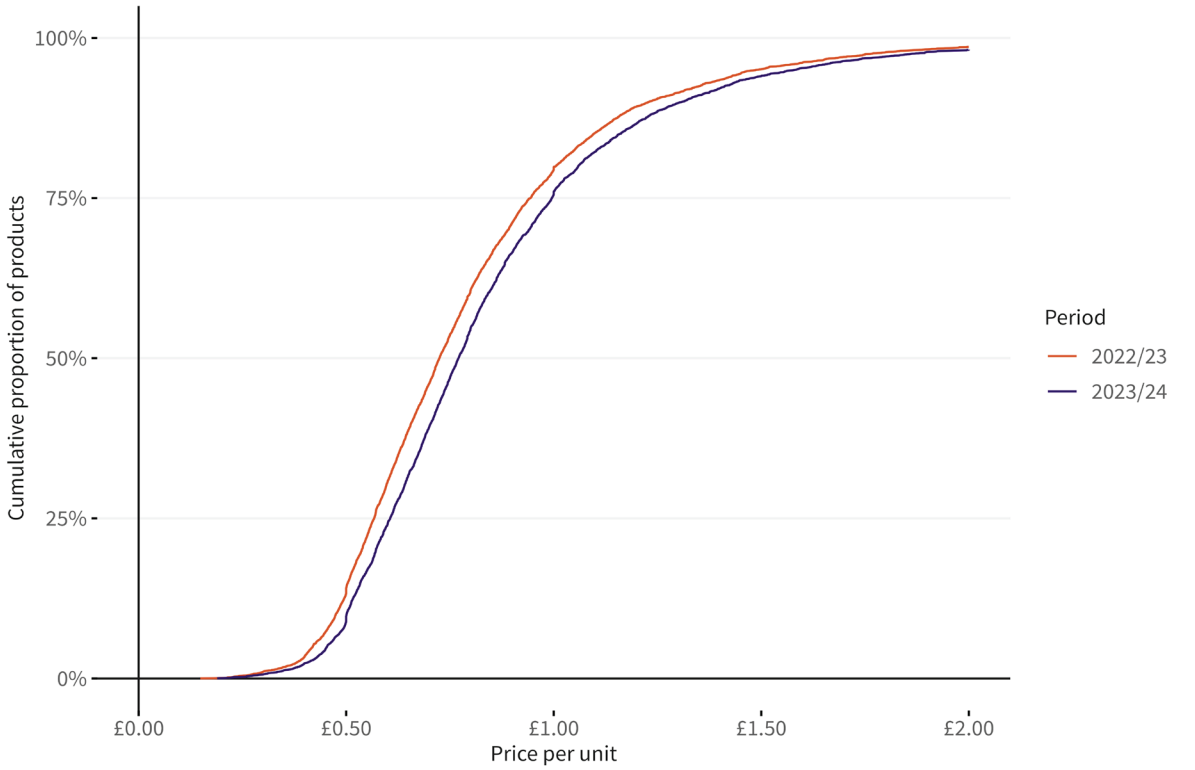
A comparison of prices per unit before and after the duty reforms



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A11

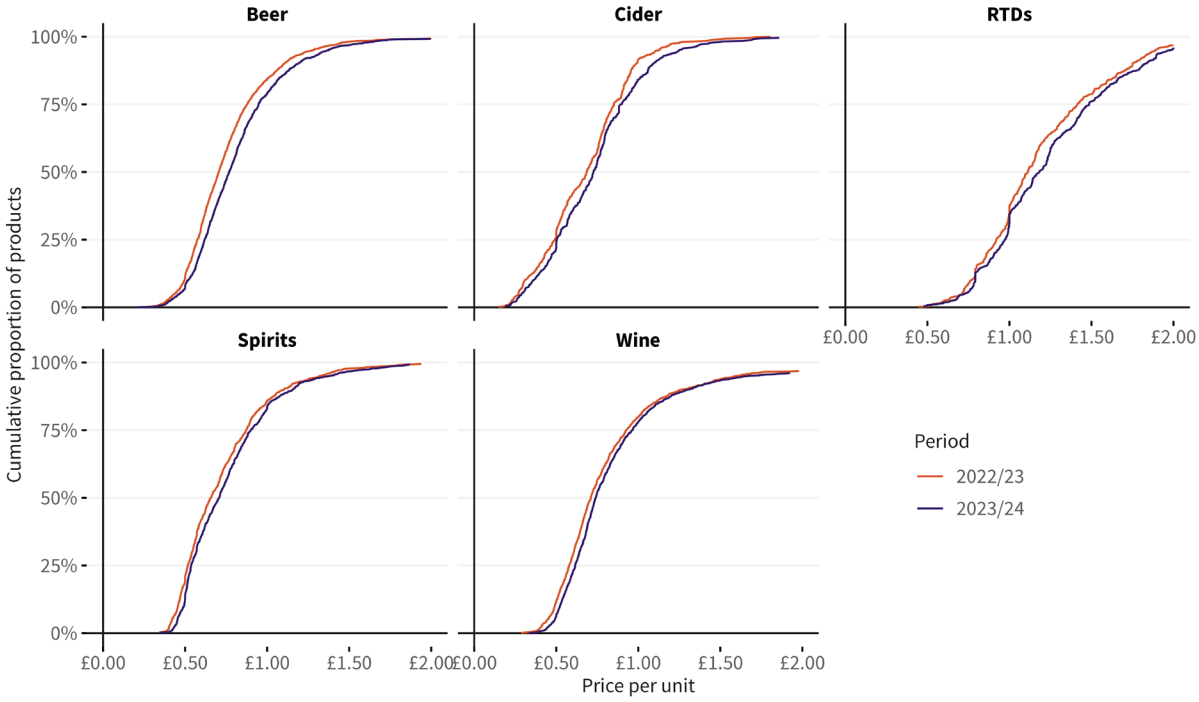
Cumulative distribution of product count by price



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A12

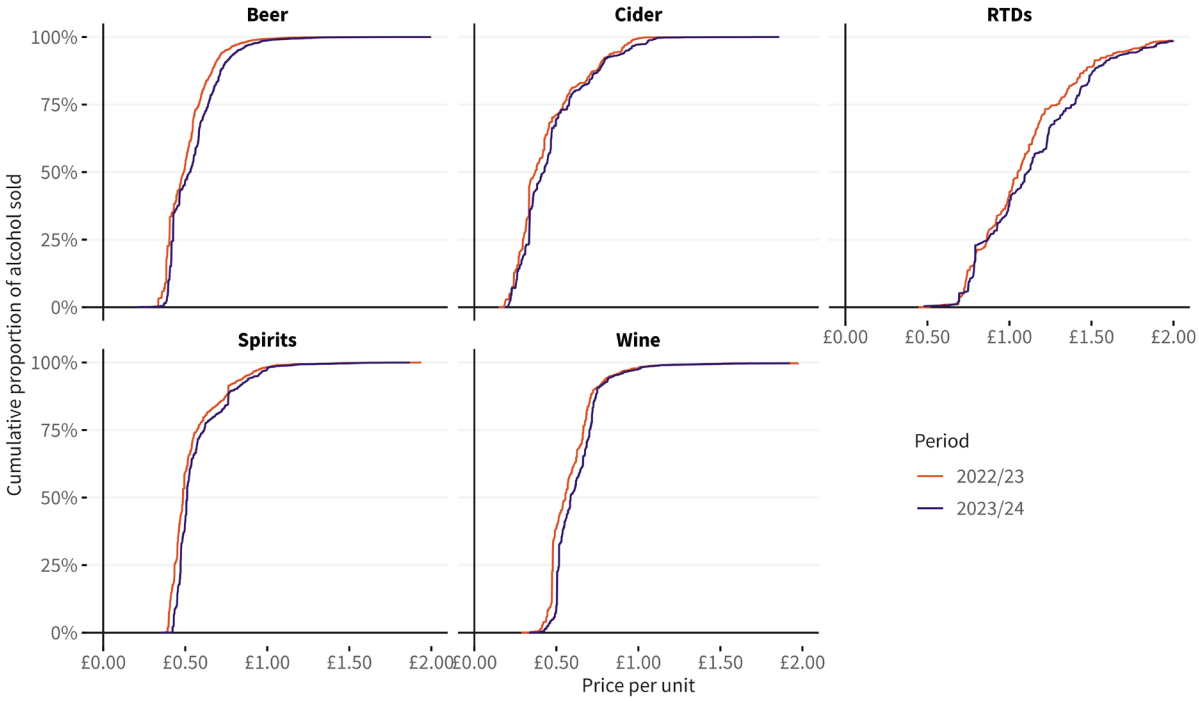
Cumulative distribution of product count by price



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A13

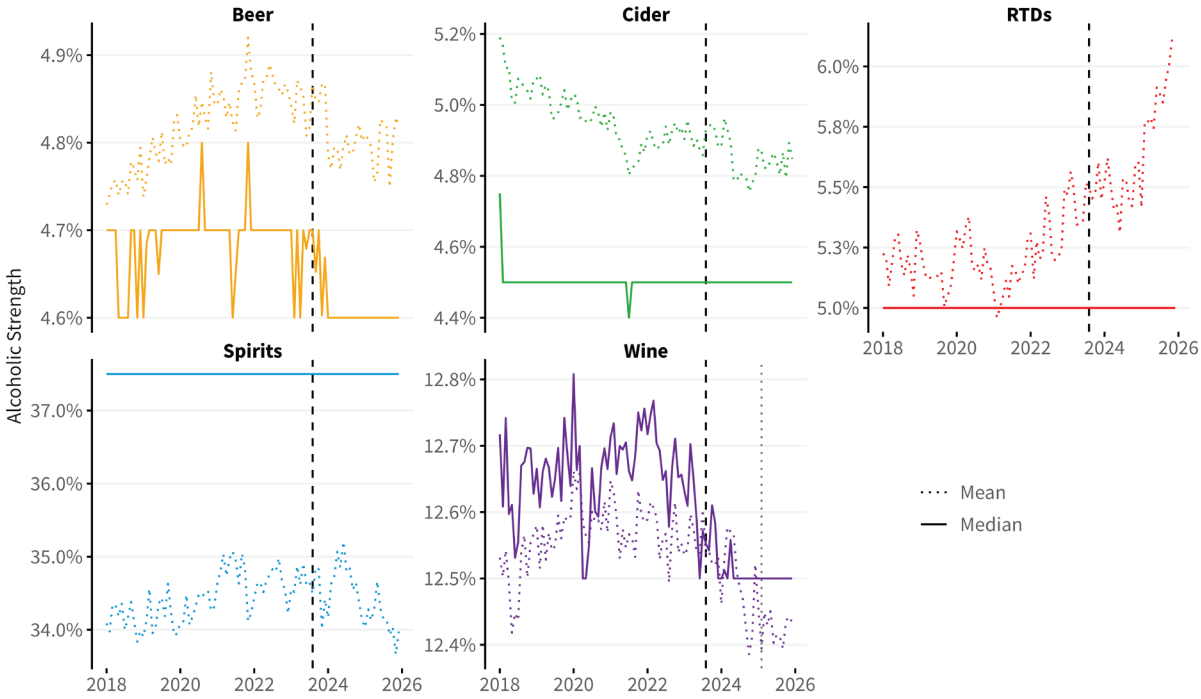
Cumulative distribution of alcohol sales volume by price



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A14

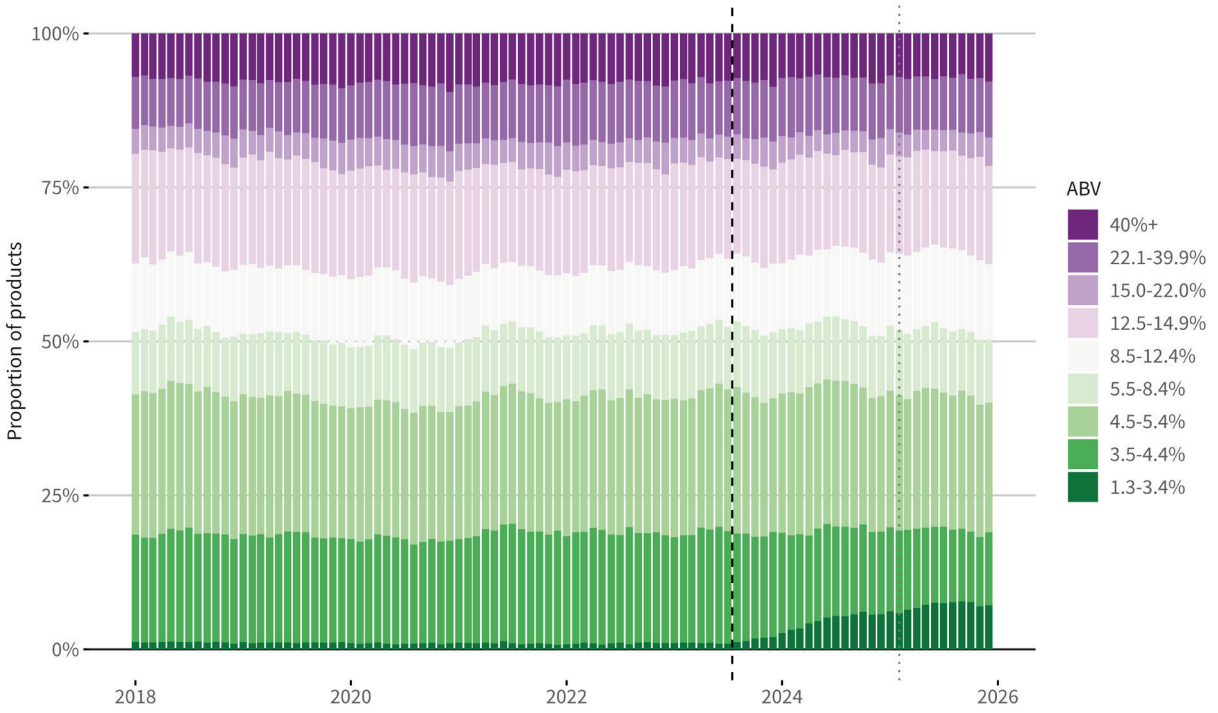
Average strength of alcohol (unweighted)



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A15

Proportion of alcohol products sold by ABV

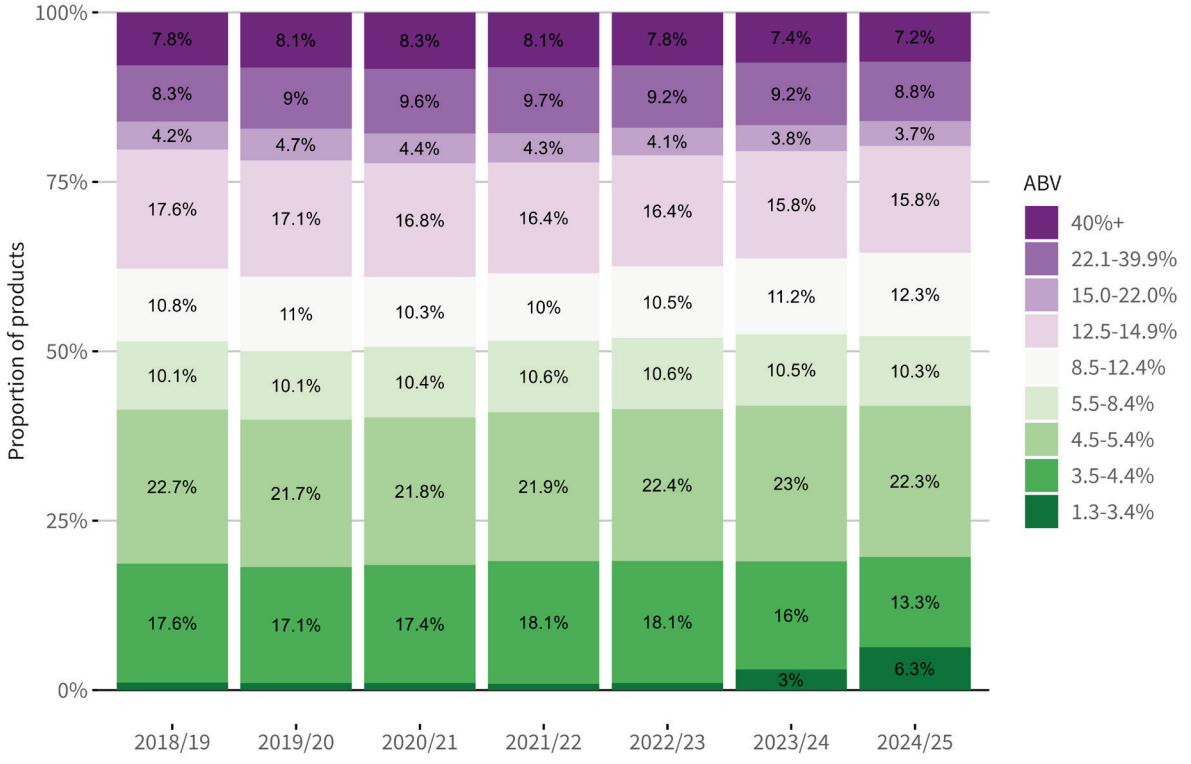


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A16

Proportion of alcohol products sold by ABV

Proportions below 3% are not labelled

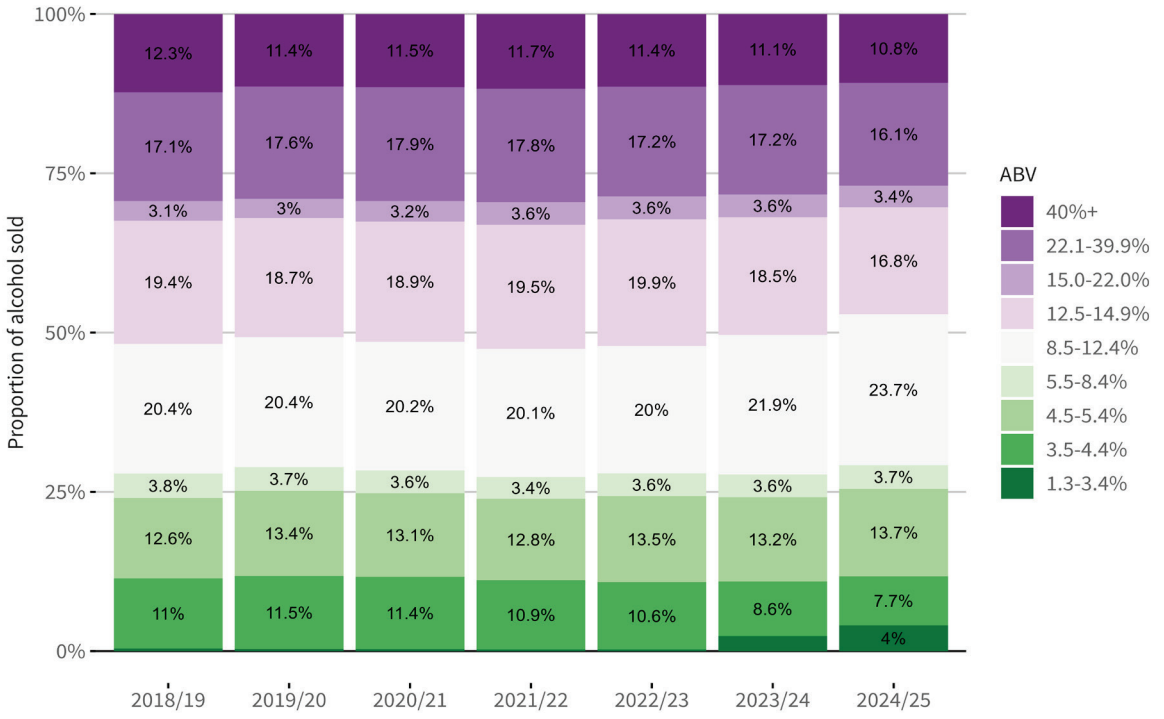


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A17

Proportion of alcohol sold by ABV

Proportions below 3% are not labelled

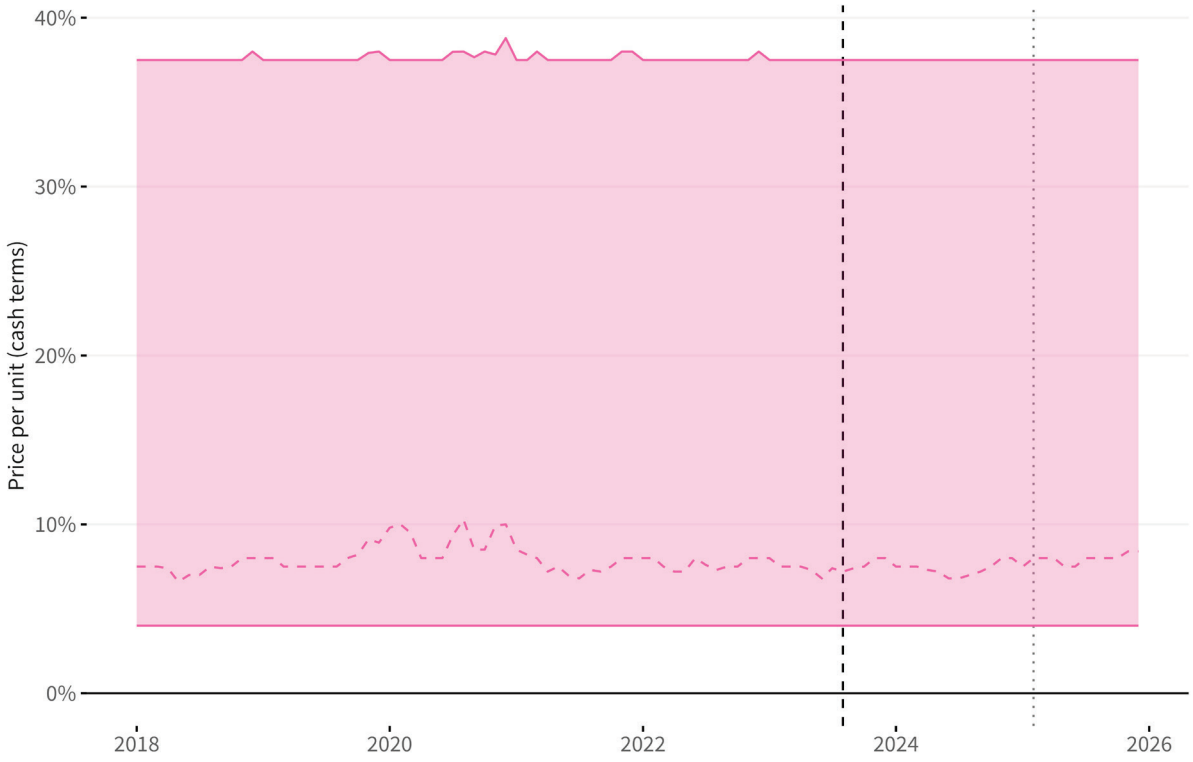


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A18

The range of alcohol prices (unweighted)

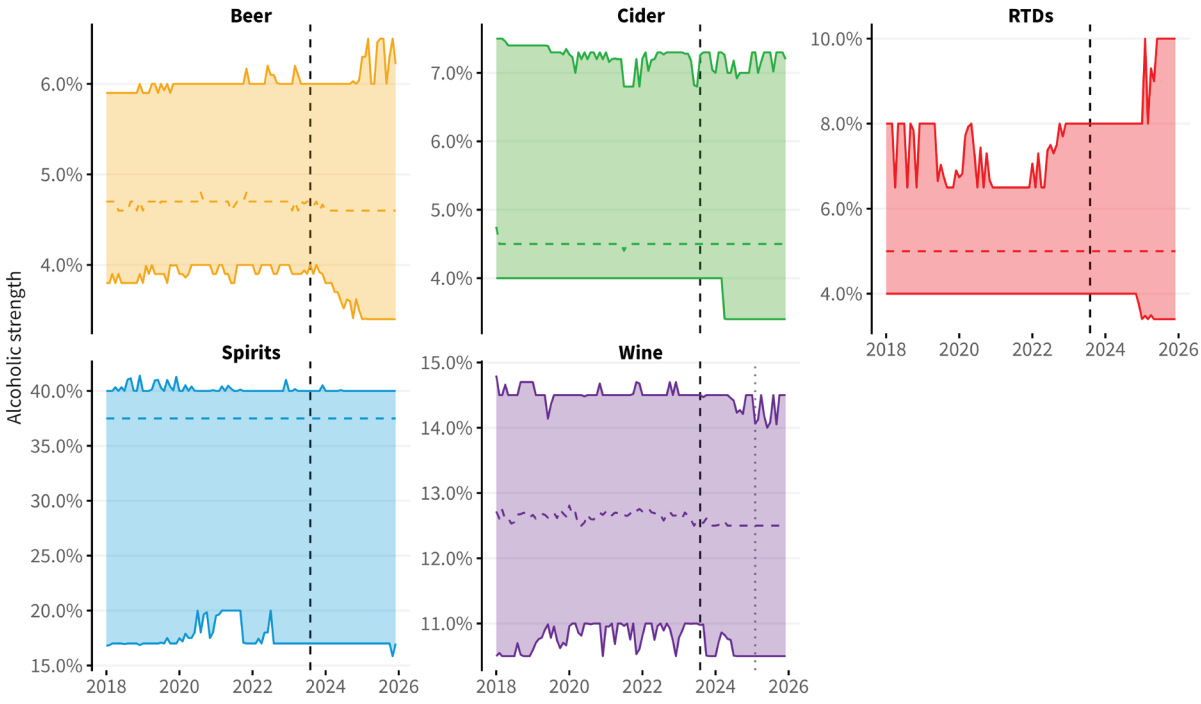
Median (dashed line), 10th and 90th percentiles (solid lines) of the distribution of alcohol product prices



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A19

Range of ABVs: 10th, 50th and 90th percentiles (unweighted)

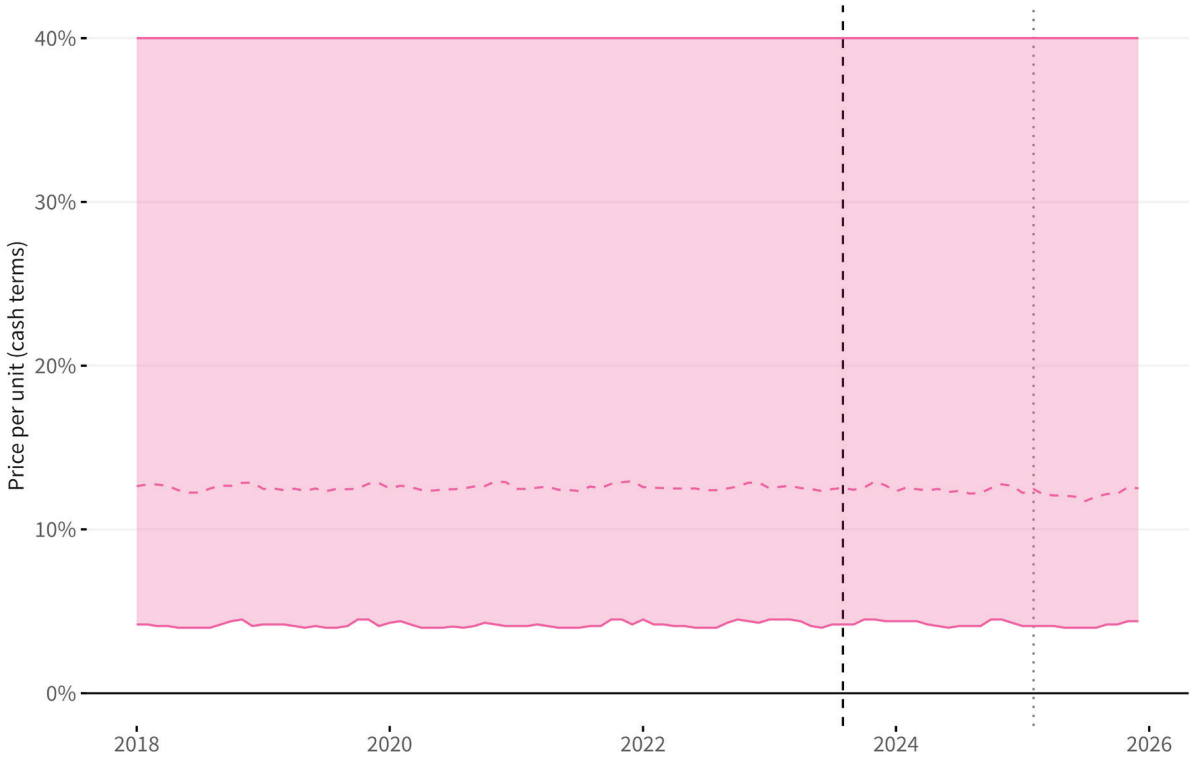


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A20

The range of alcohol prices (weighted)

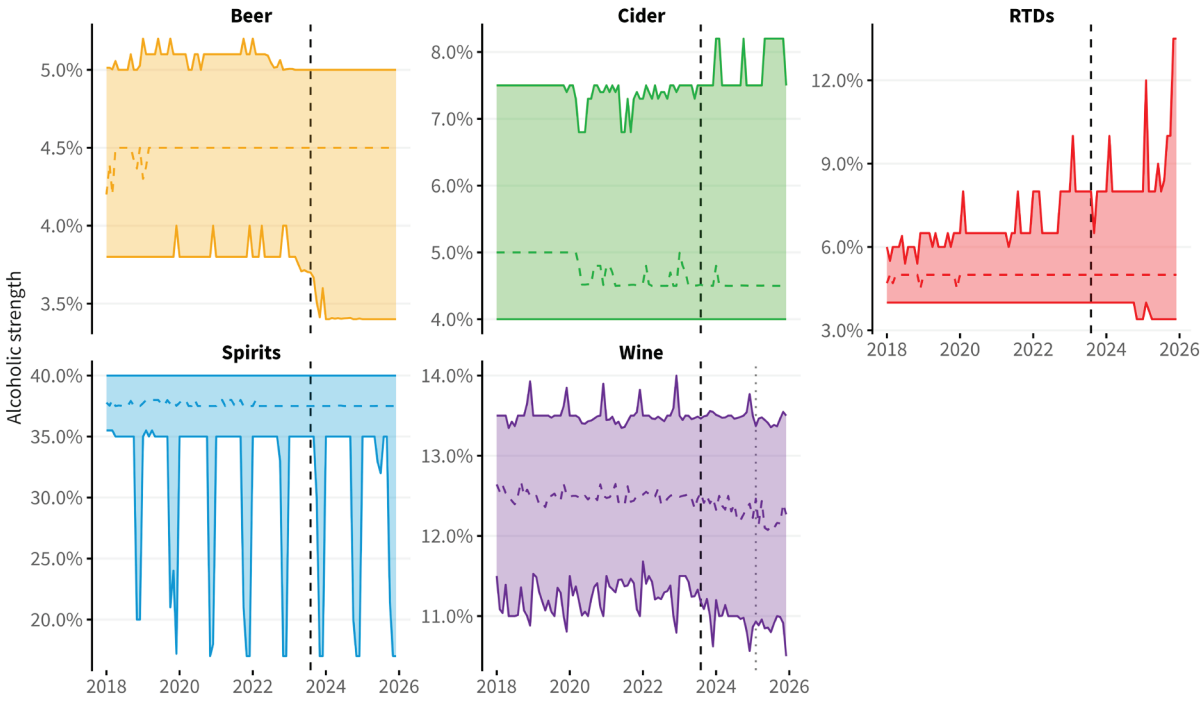
Median (dashed line), 10th and 90th percentiles (solid lines) of the distribution of alcohol product prices



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A21

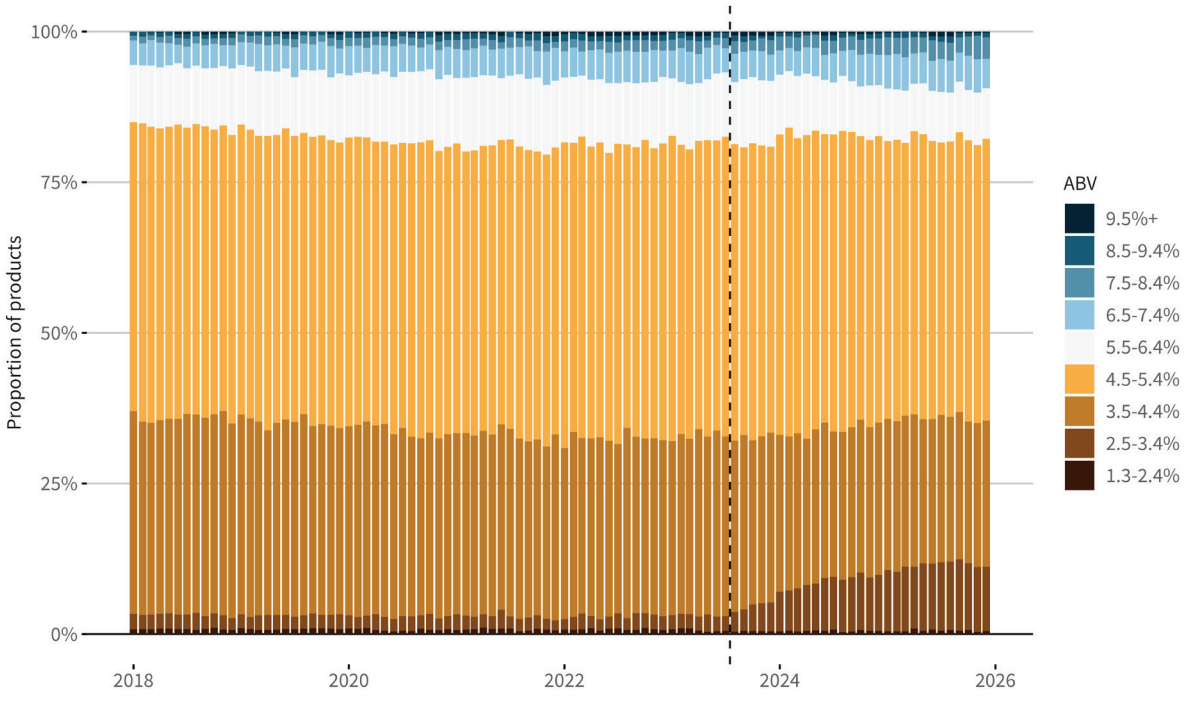
Range of ABVs: 10th, 50th and 90th percentiles (weighted)



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A22

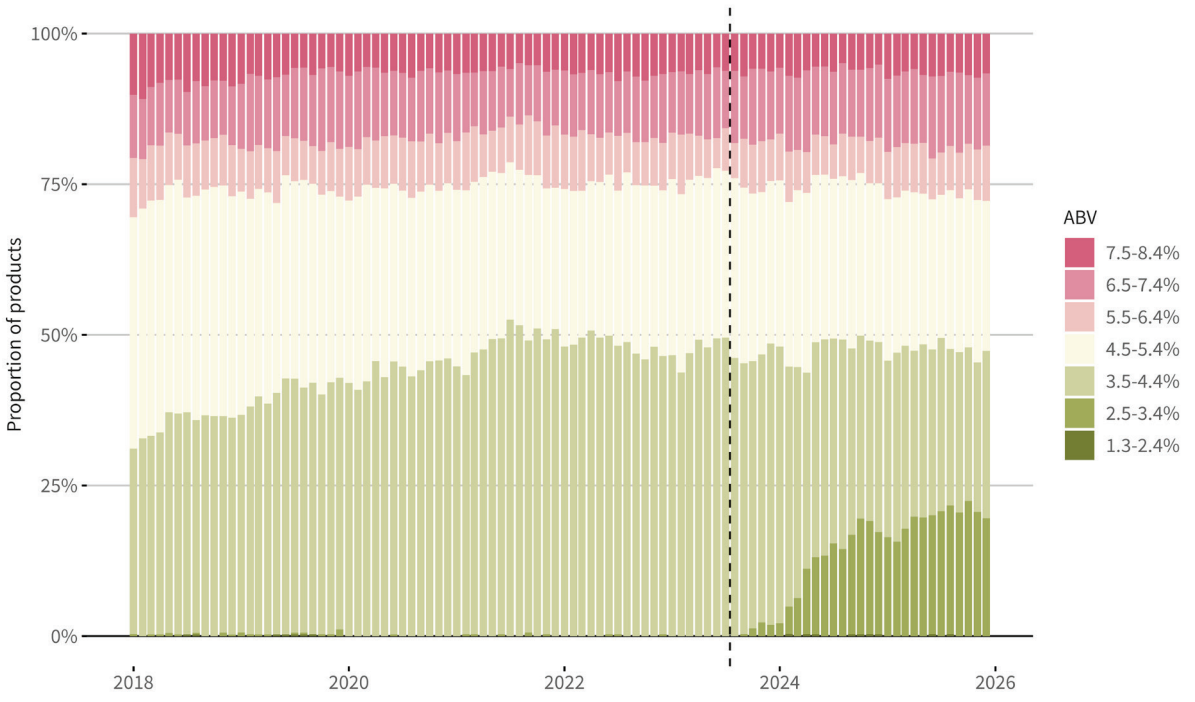
Proportion of beer products sold by ABV



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A23

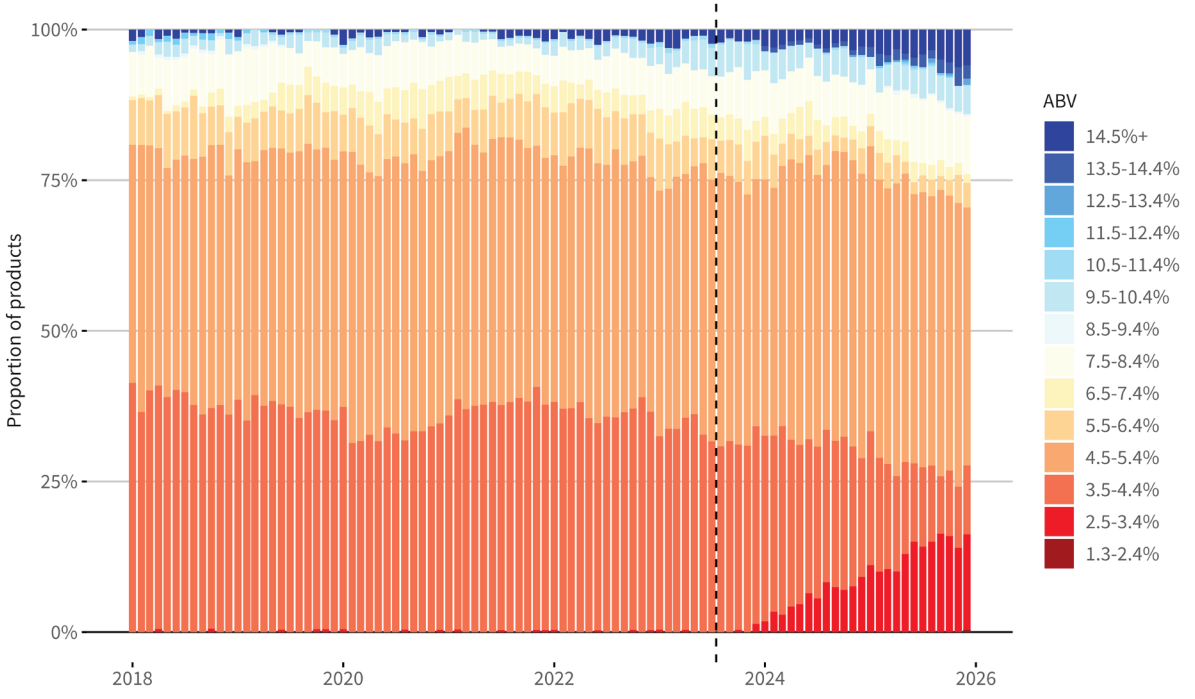
Proportion of cider products sold by ABV



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A24

Proportion of RTD products sold by ABV

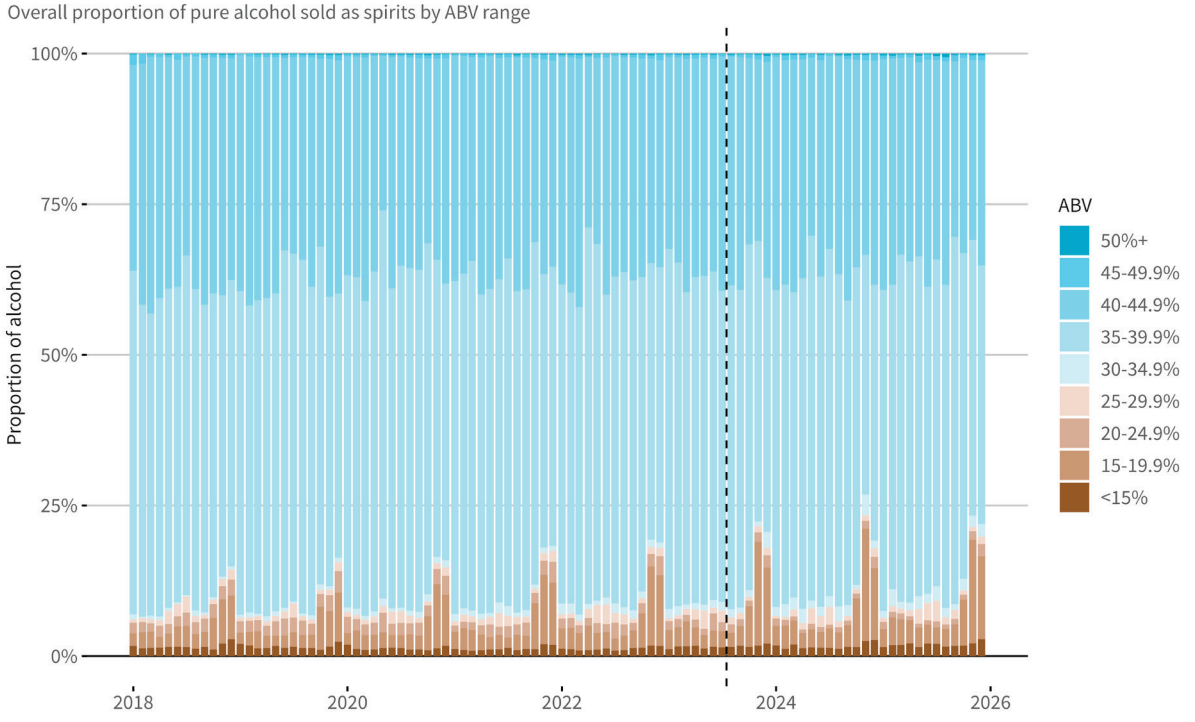


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A25

Proportion of spirits sales by ABV

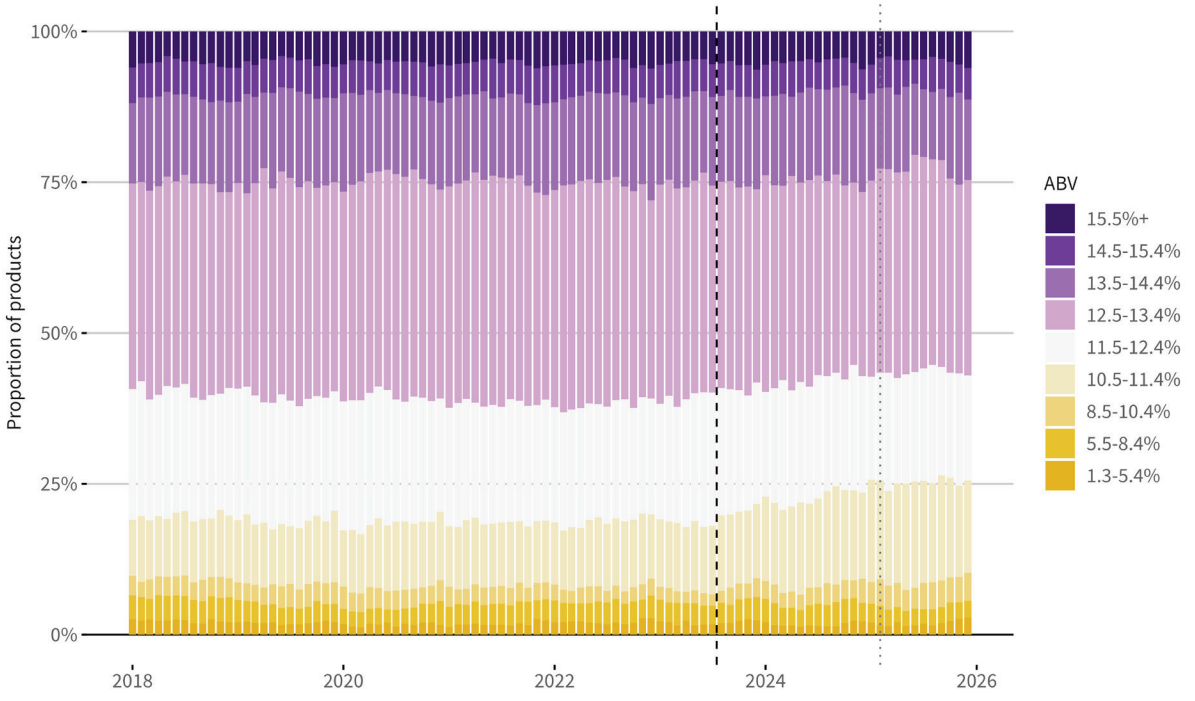
Overall proportion of pure alcohol sold as spirits by ABV range



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A26

Proportion of wine products sold by ABV

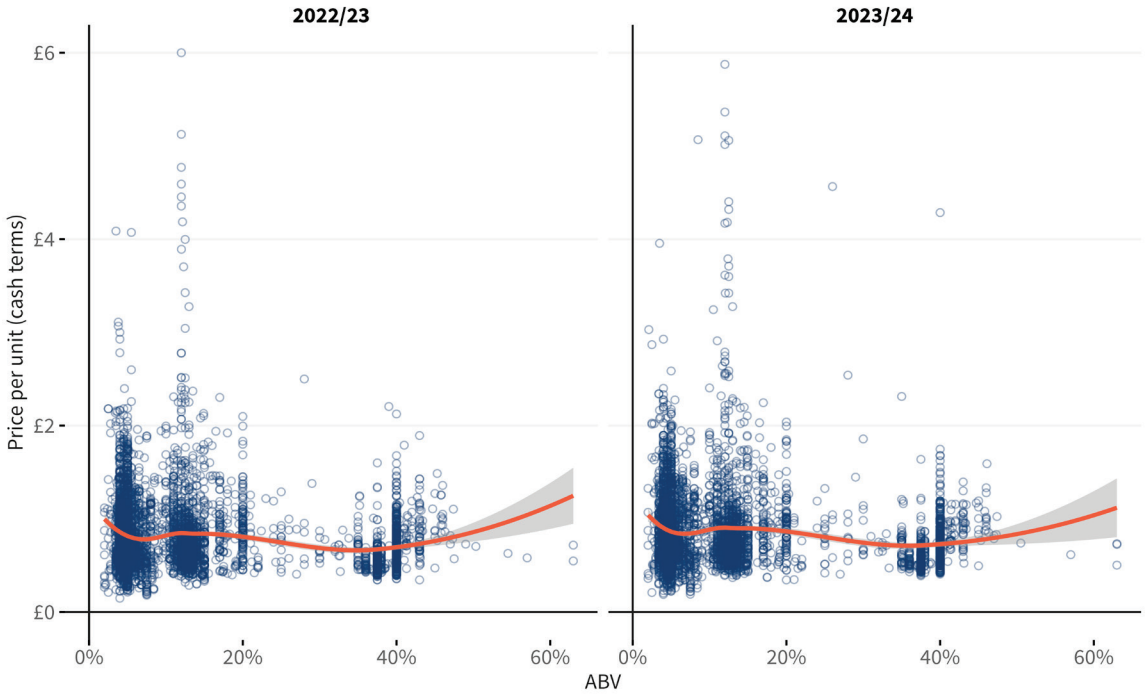


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A27

Price per unit vs. ABV for all alcohol

Circles represent individual products.
The orange line is a smoothed Loess regression line with 95% confidence intervals

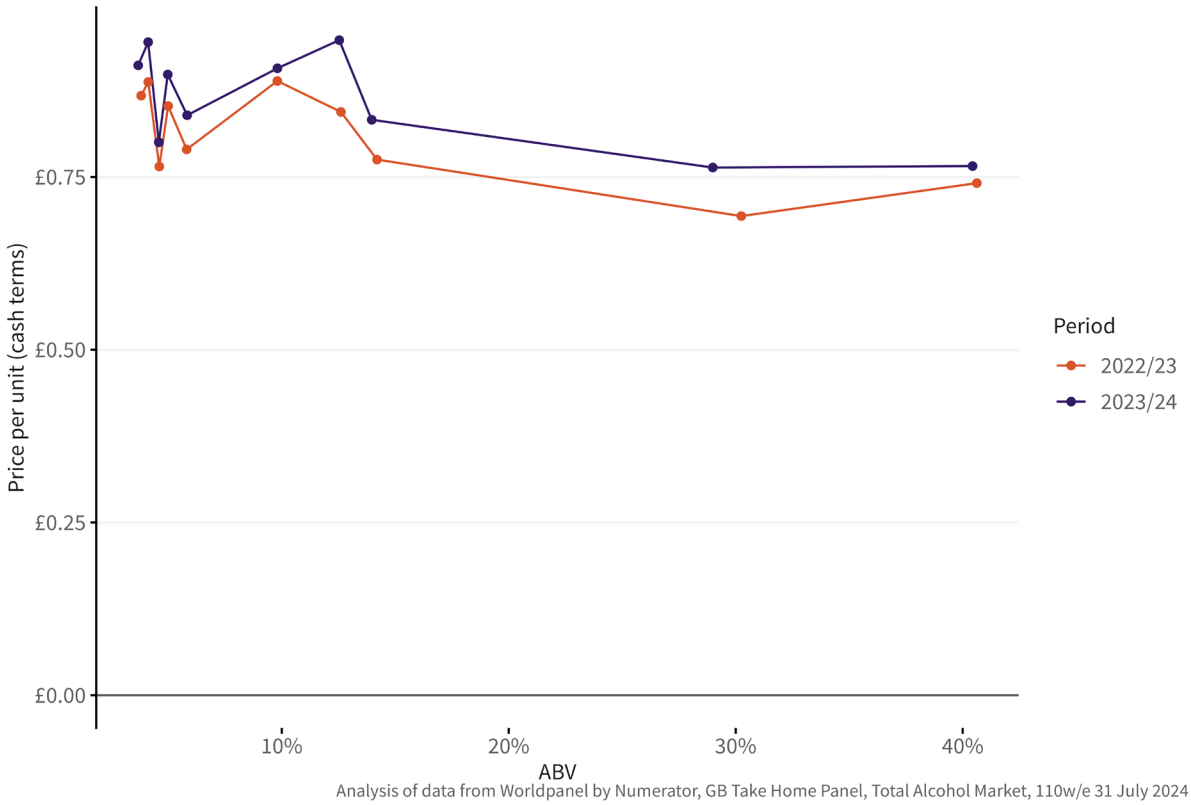


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A28

Price per unit vs. ABV for all alcohol (unweighted)

Points represent mean prices paid and mean ABV within deciles of the ABV distribution

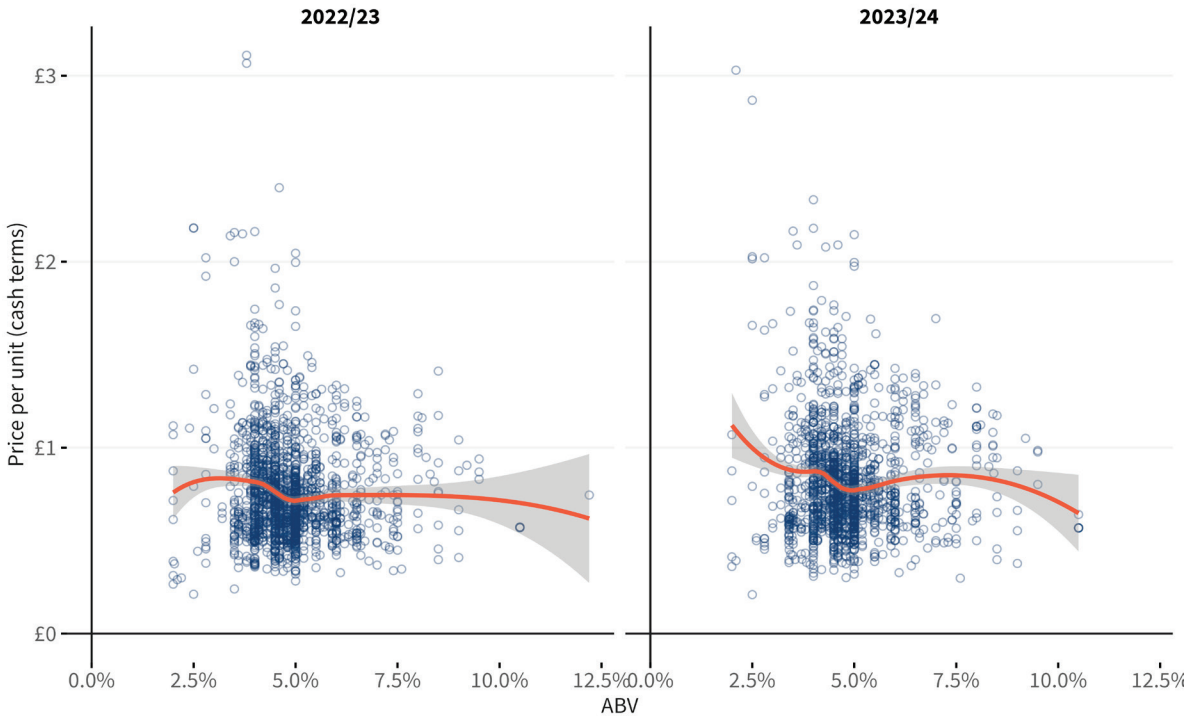


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A29

Price per unit vs. ABV for beer

Circles represent individual products.
The orange line is a smoothed Loess regression line with 95% confidence intervals

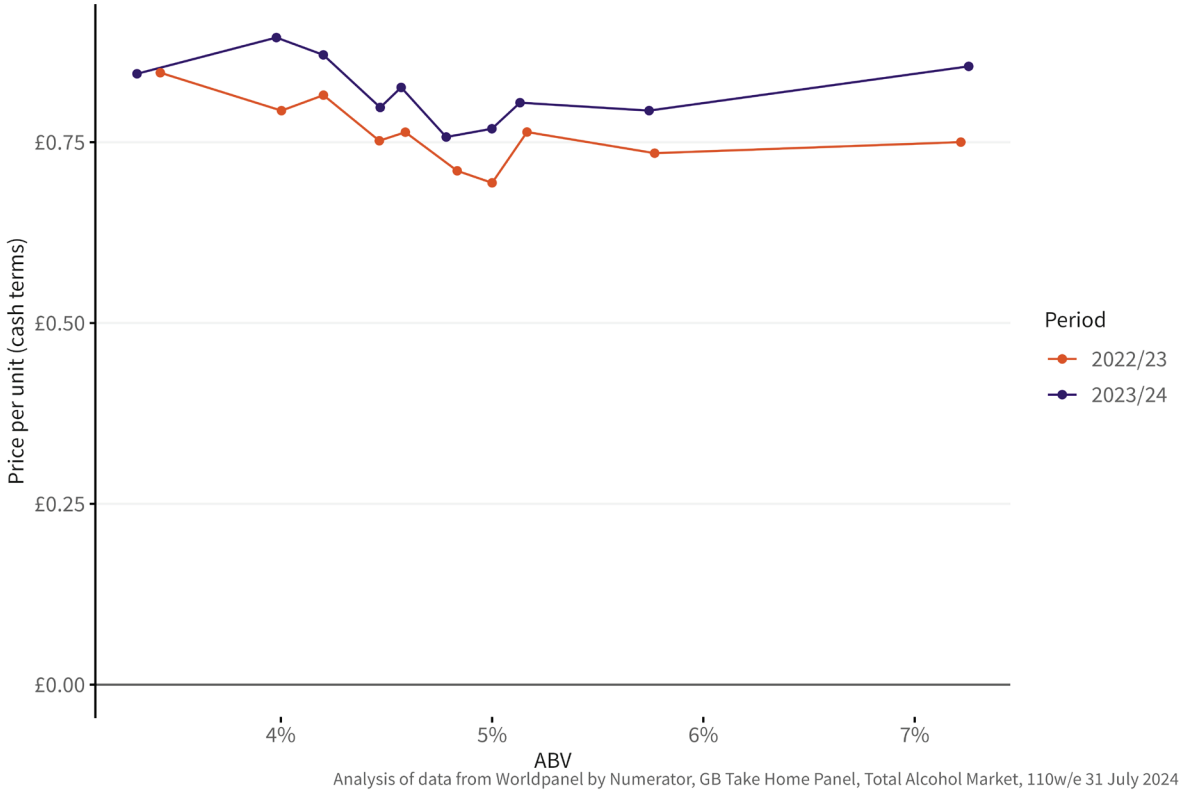


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A30

Price per unit vs. ABV for beer (unweighted)

Points represent mean prices paid and mean ABV within deciles of the ABV distribution



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A31

Price per unit vs. ABV for cider

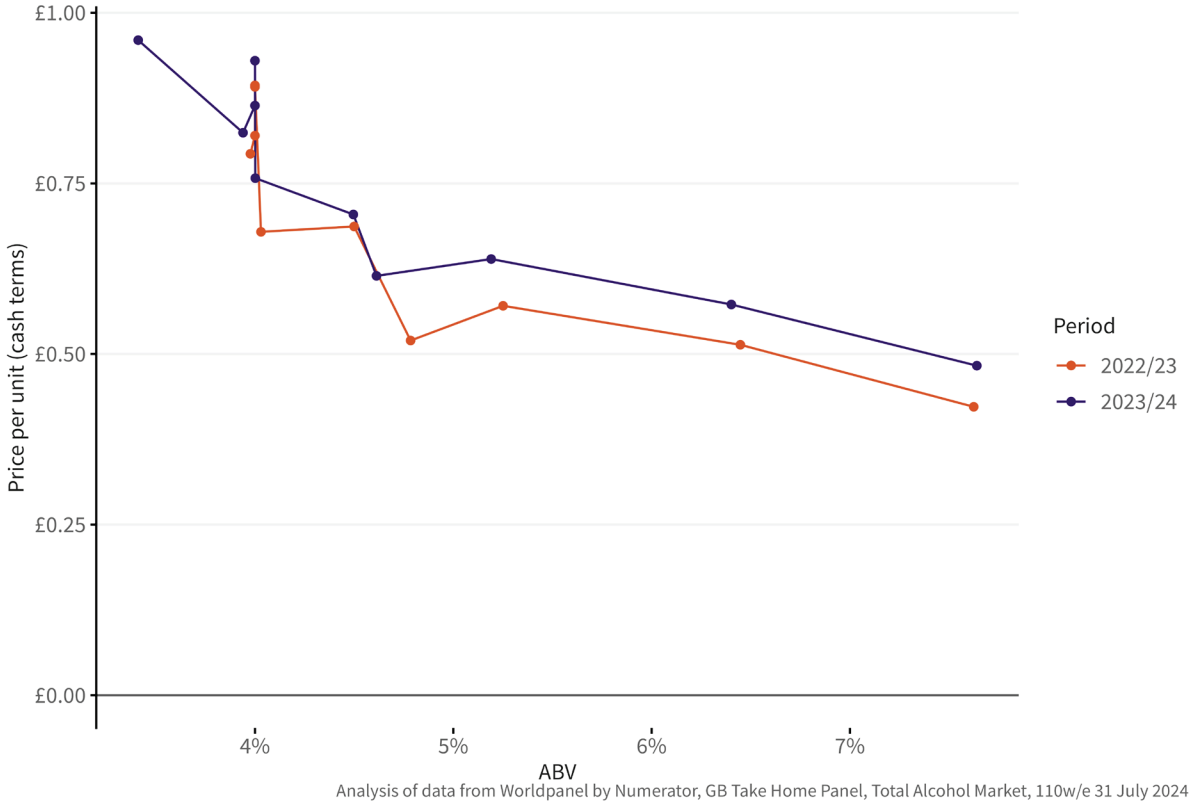
Circles represent individual products.
The orange line is a smoothed Loess regression line with 95% confidence intervals

Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A32

Price per unit vs. ABV for cider (unweighted)

Points represent mean prices paid and mean ABV within deciles of the ABV distribution

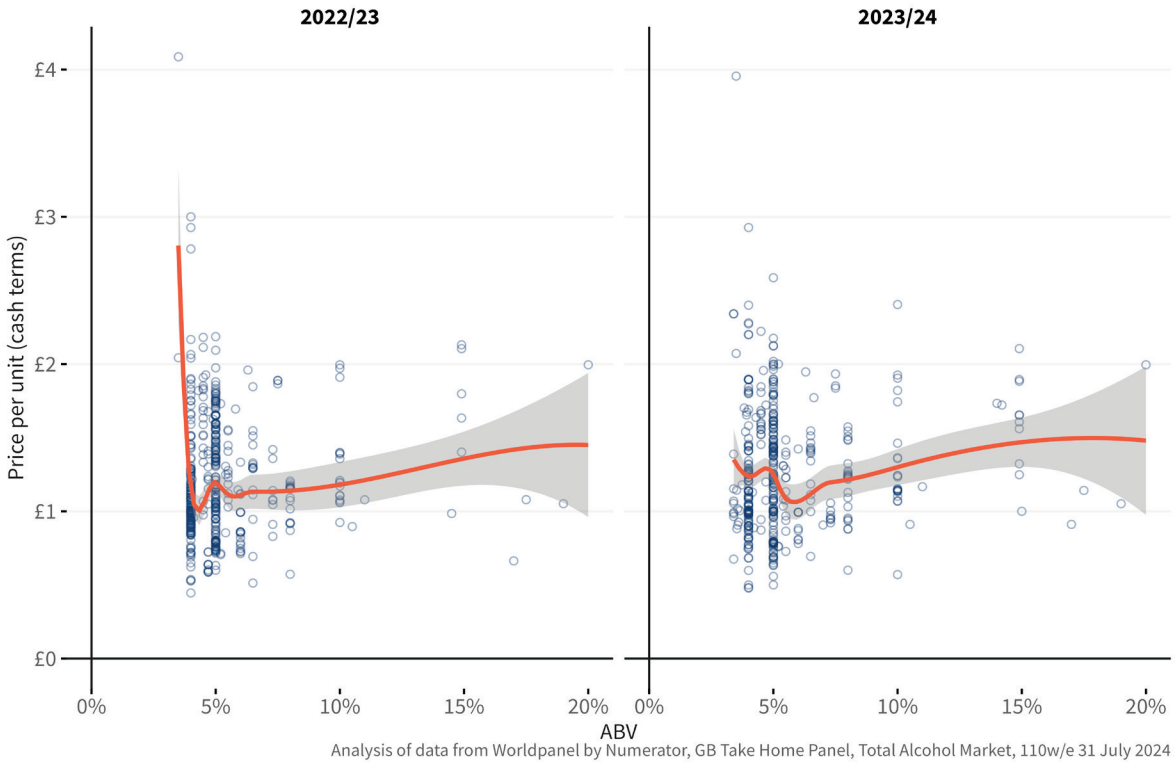


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A33

Price per unit vs. ABV for RTDs

Circles represent individual products.
The orange line is a smoothed Loess regression line with 95% confidence intervals

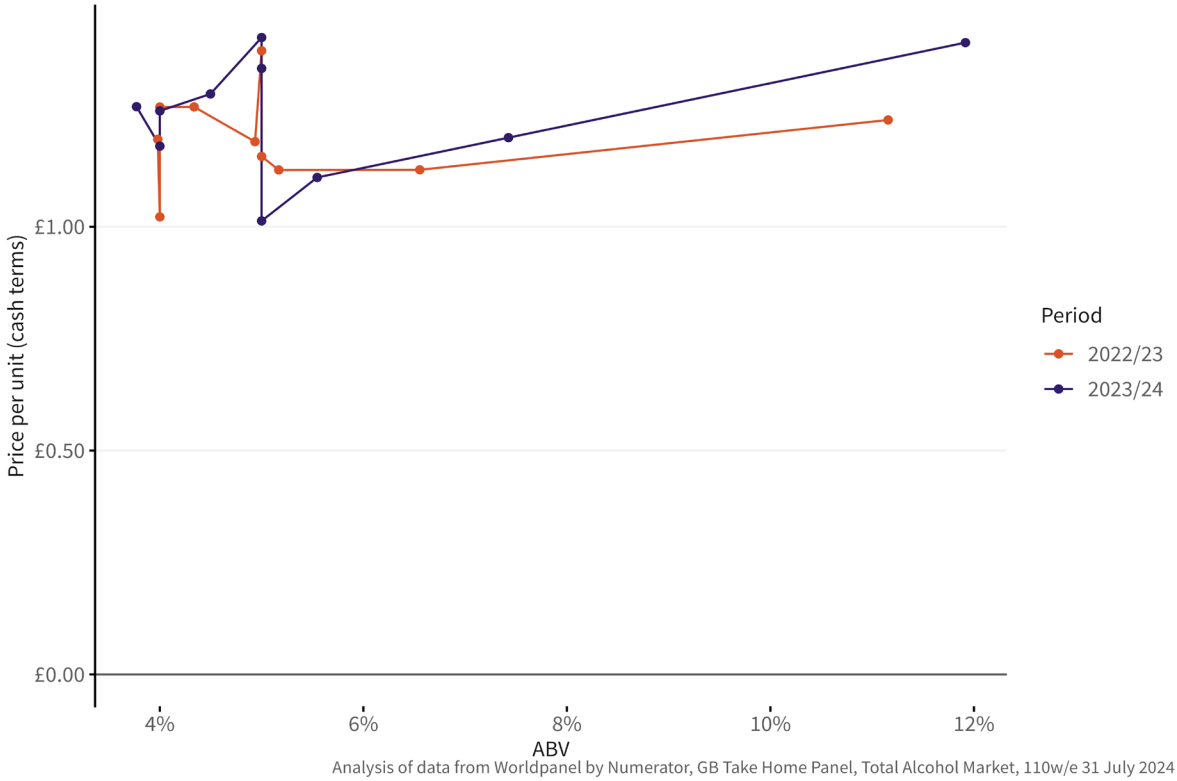


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A34

Price per unit vs. ABV for RTDs (unweighted)

Points represent mean prices paid and mean ABV within deciles of the ABV distribution

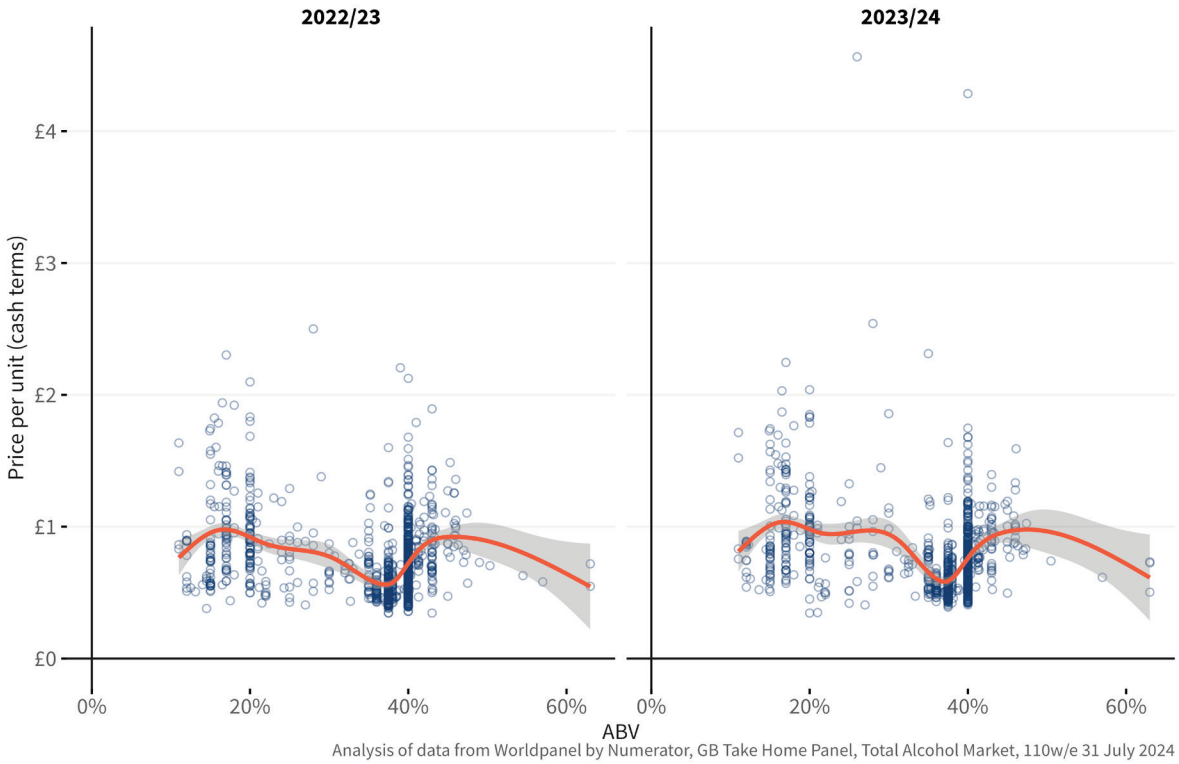


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A35

Price per unit vs. ABV for spirits

Circles represent individual products.
The orange line is a smoothed Loess regression line with 95% confidence intervals

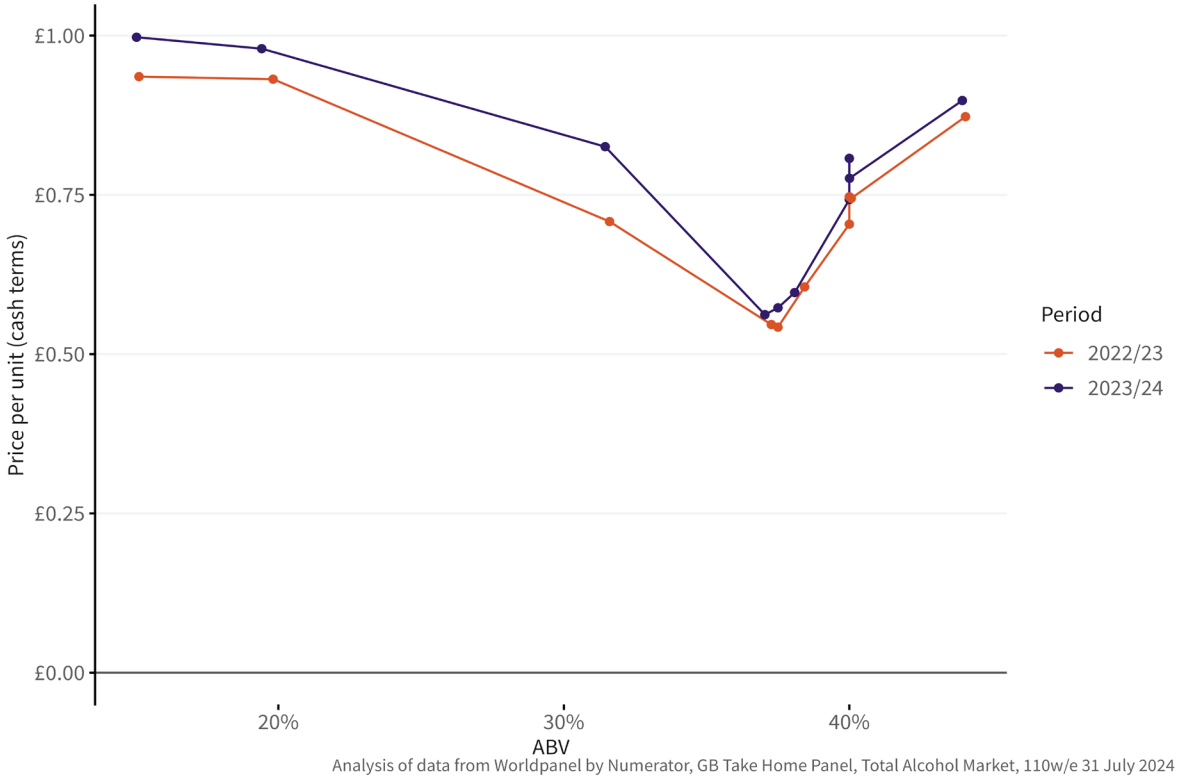


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A36

Price per unit vs. ABV for spirits (unweighted)

Points represent mean prices paid and mean ABV within deciles of the ABV distribution

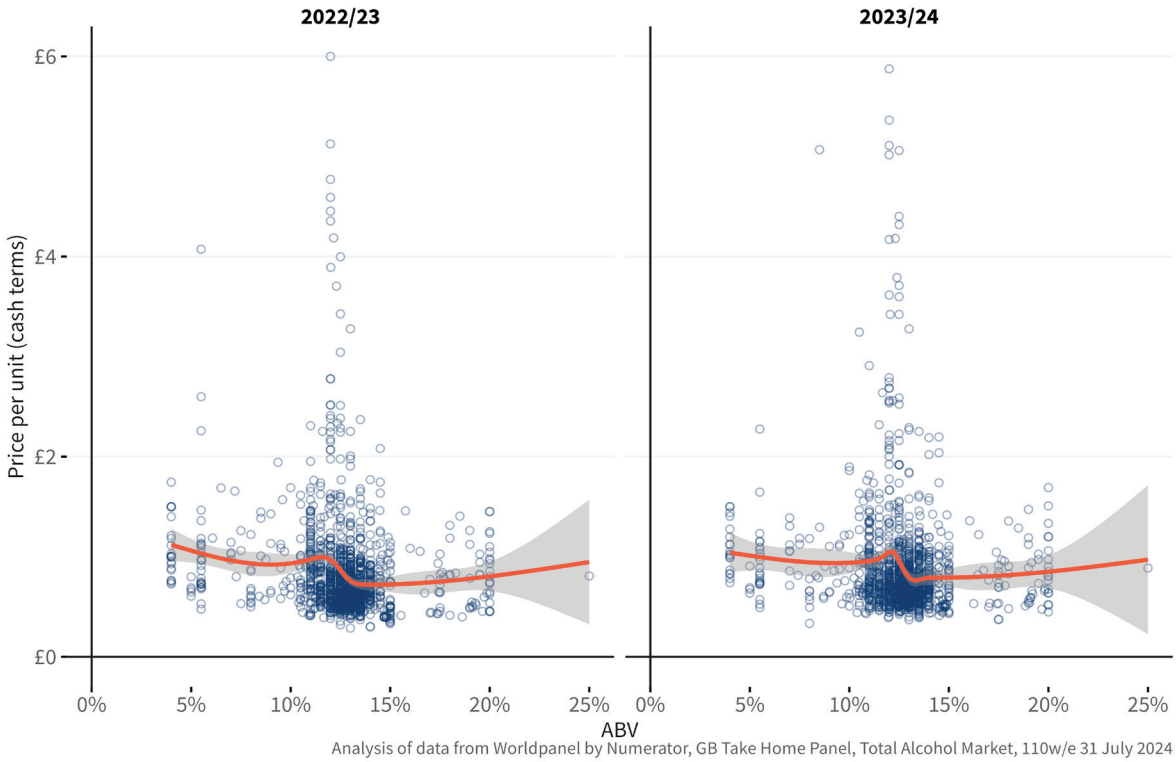


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A37

Price per unit vs. ABV for wine

Circles represent individual products.
The orange line is a smoothed Loess regression line with 95% confidence intervals

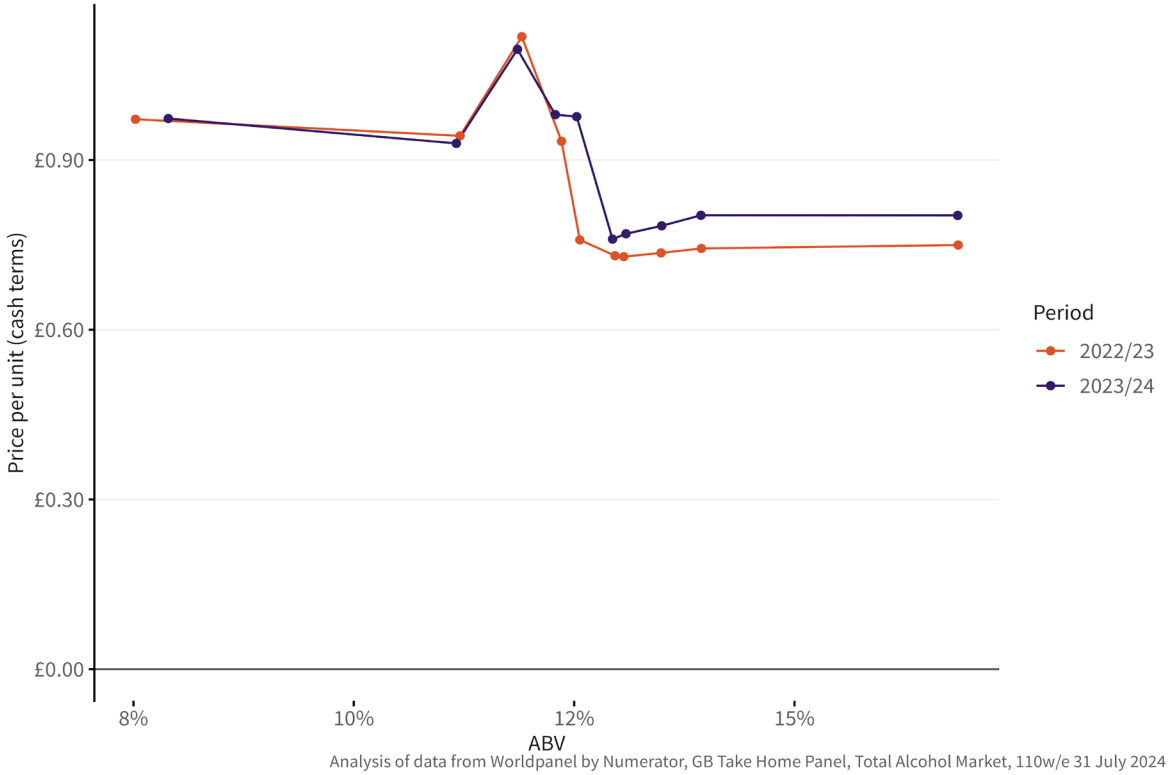


Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

Figure A38

Price per unit vs. ABV for wine (unweighted)

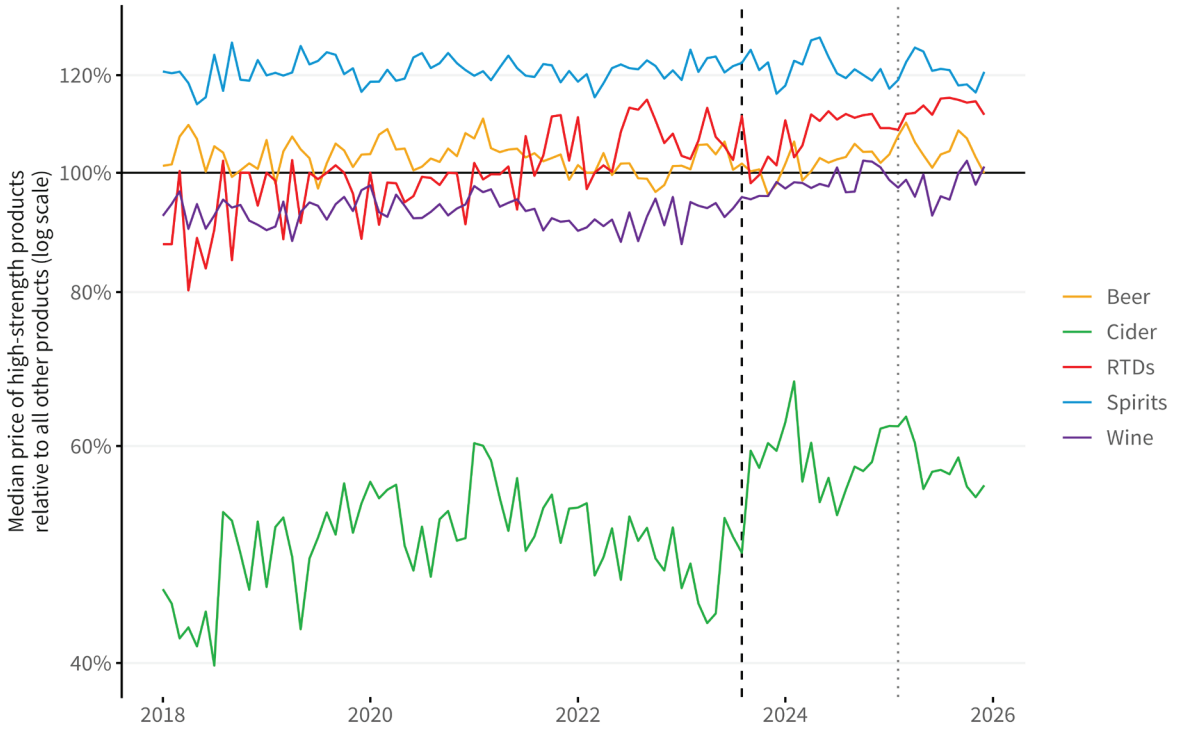
Points represent mean prices paid and mean ABV within deciles of the ABV distribution



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 110w/e 31 July 2024

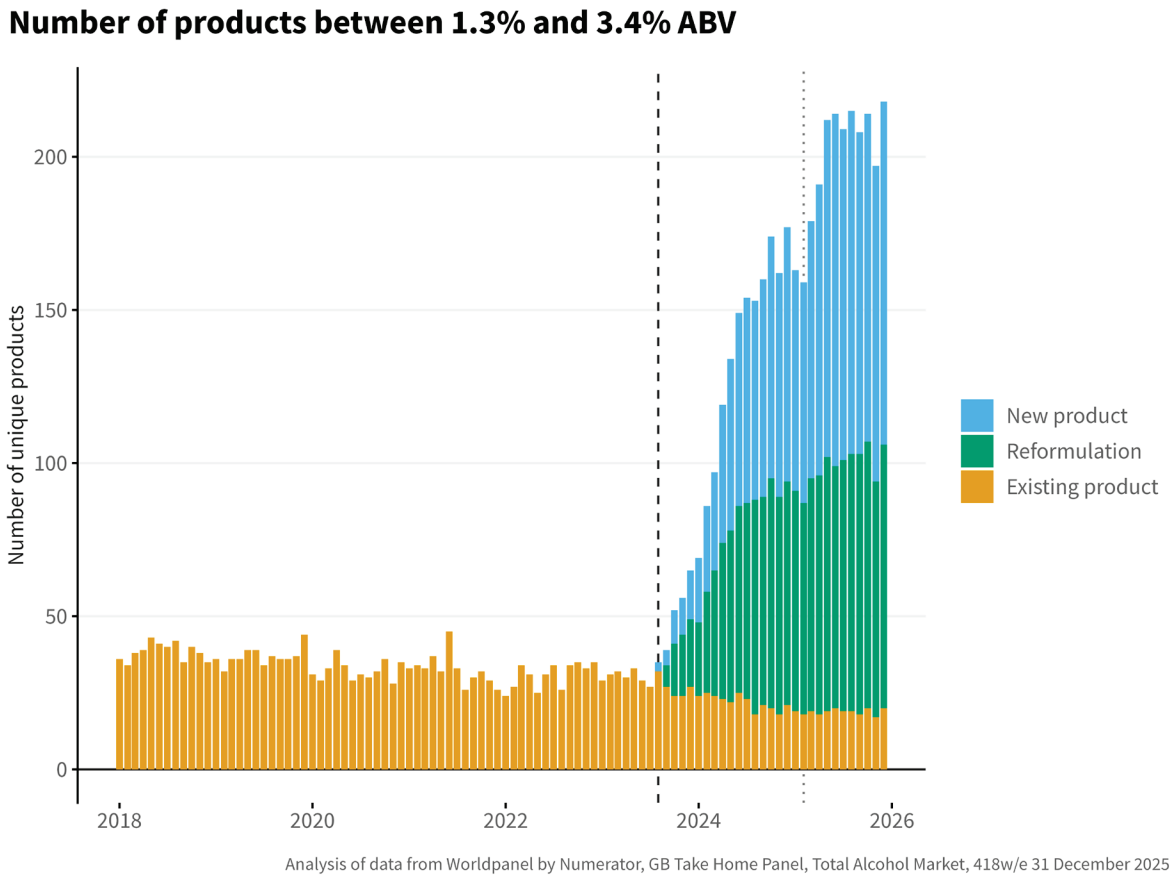
Figure A39

Relative price of the strongest alcohol to other products (unweighted)



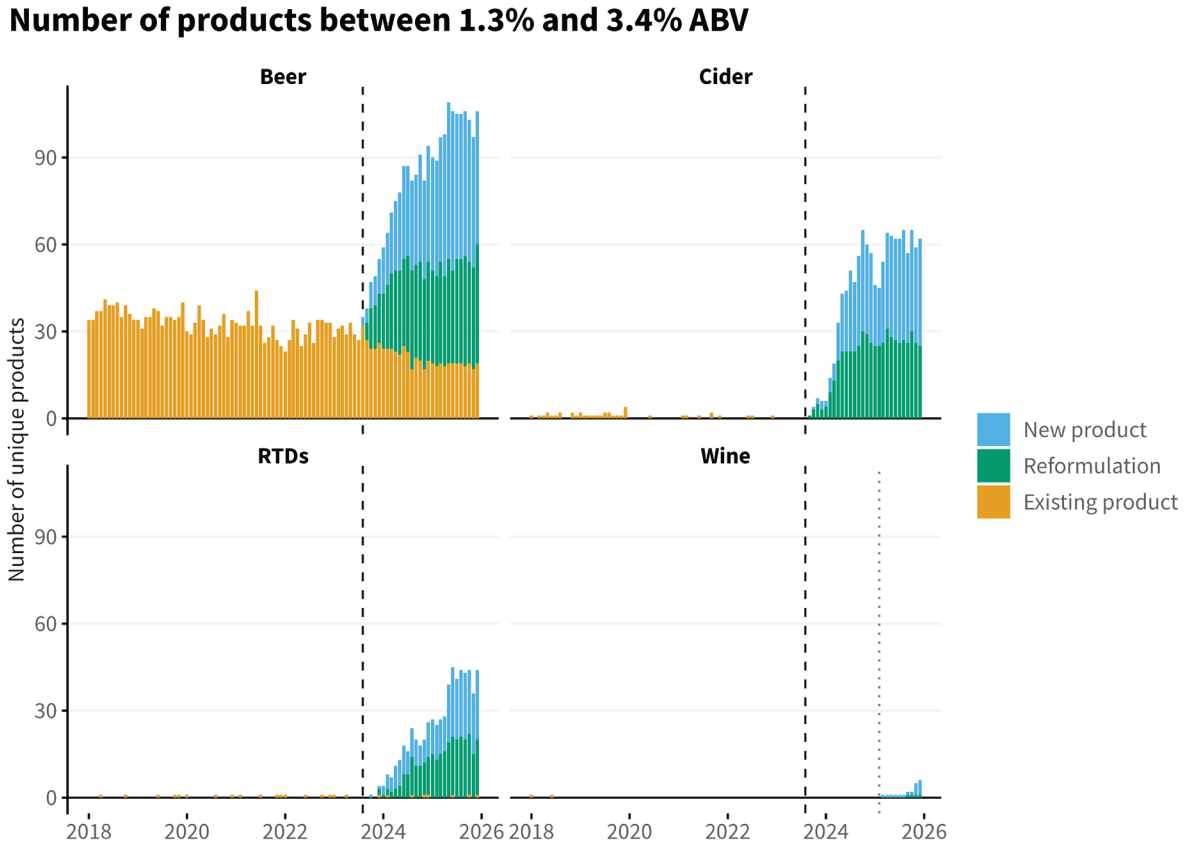
Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A40



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025

Figure A41



Analysis of data from Worldpanel by Numerator, GB Take Home Panel, Total Alcohol Market, 418w/e 31 December 2025