

We Are Beer Insight Executive summary

2024



Investigating the trends
shaping the future of beer →



Hello

Welcome to We Are Beer Horizons, a report exploring opportunities for the UK beer market over the next five years. We named it Horizons because it looks beyond current challenges in order to identify future possibilities.

WHY IS THIS IMPORTANT?

Simply put, having a perspective on the horizon is key to deciding on a strategy and making plans.

This is especially important for modern beer as macro socio-economic headwinds are setting the scene for a new phase in beer consumption. Furthermore, craft beer, which has been a significant driver of the category, has matured, investment has slowed and competition has greatly increased. This means that successful breweries need a clear plan to reach new customers and consumers, and get them coming back as often as possible.

This new phase will be defined and shaped by individual, cultural, economic, and environmental shifts, just as the past one. We Are Beer Horizons aims to empower business decision-makers by providing insight into these shifts and offering foresight on their impact on beer.

REASONS TO BE OPTIMISTIC



£19.5bn

UK beer market*



£130bn

European beer market*

Beer leads on-trade volume and value at

£13.5bn**



“The trend towards premiumisation is here to stay.”

Stephan Pietge, Arlington Capital Advisors

The UK and European beer market is vast, vibrant and, despite recent challenges, our findings show there's real opportunity in the beer category over the next five years. There is strong equity at the product, brand, and personnel levels, the requisite foundations for sustainable growth. At We Are Beer, we see beer's unique ability to bring people together as a fertile environment for growth and we are extremely optimistic about the future.

Many thanks,

GREG WELLS

Co-founder of We Are Beer



The Methodology

This Horizons report was created through a combination of numerous interviews with industry experts, academics and futures thinkers, as well as previous primary research with our community of beer drinkers (previously published in our We Are Beer 'Good Beer Drinker' 2024 Report).

We also did extensive secondary research, synthesising over 30 reports on future market trends, and drawing on the collective knowledge of the We Are Beer team and network. We would like to thank our experts for their contributions to this report.

THE EXPERTS



ADAM CHMIELOWSKI

Cultural Strategist and Co-founder of Starling Strategy



ANNIE AUERBACH

Author of *Flex: Reinventing Work for a Smarter, Happier Life* and Co-founder of Starling Strategy



CHRIS LEWINGTON

Host of *The Modern Brewer* Podcast and founder of Brew Resourceful, a social enterprise focused on making the craft brewing world more resourceful



DR EMILY NICHOLLS

Senior Lecturer in Sociology at the University of York and alcohol researcher, her research includes work on women's experiences of early sobriety, drinking in lockdown during the COVID-19 pandemic and a project funded by the Institute of Alcohol Studies on the marketing and consumption of alcohol-free drinks



GEORGE WADE

Co-Founder and Chief Commercial Officer of Zevero - the platform helping organisations measure, reduce and report their impact on the planet by building sustainability programmes to reach net zero



IMME ERMGASSEN

Cultural Strategist and co-founder of non-alcoholic aperitivo, Botivo



LORRAINE COPES

Founder and CEO of Be Inclusive Hospitality - a not-for-profit organisation dedicated to building a thriving community that accelerates racial equity in hospitality, food, and drink



LUCA LORENZONI

Advisor and ex-MD of Camden Town Brewery and Northern Monk



STEPHAN PIETGE

MD Europe, Arlington Capital Advisors



DR THOMAS THURNELL-READ

Reader in sociology at Loughborough University, an internationally recognised and leading scholar of sociological approaches to the study of alcohol, drinking and drunkenness, with over a decade of experience researching alcohol consumption and drinking culture

Exec Summary: The 5 Horizons

Our research has identified five different horizons through which to understand the challenges and opportunities for beer over the next five years: work, health, identity, sustainability and AI.



ECONOMY & WORK

Amid ongoing economic challenges, both how we work, and how we feel about work is changing. This is leading to a new set of softer values, reconfiguring traditional notions of aspiration and success. As we spend more time at home and less on our commute, community will also become a central focus for consumers. Beer brands that cultivate a sense of belonging and engagement will do well in this horizon.

HEALTH

As we move away from toxic wellness trends to a more empathetic approach to our health, one that emphasises physical, mental, and social well-being, a new phase of mindful drinking will emerge. Breweries will need to respond to the increasing demand for low, no, and mid-strength beer options as the lines between drinkers and non-drinkers, and drinking and non-drinking occasions increasingly blur. Brands that can foster social connections while prioritising quality and innovation will be well-positioned to thrive in this horizon.

IDENTITY & MARKETING

As life stage, gender, age, ethnicity, and religious norms shift, identities are becoming more fragmented and fluid, particularly among younger consumers like Gen Z. As such they won't be bound to the same rituals or rites of passage of previous generations when it comes to drinking. To resonate with the multifaceted identities of this generation, breweries must embrace inclusivity and innovation, as well as deliver diverse experiences at both product and brand levels. Fostering a more inclusive environment will also help breweries attract a wider audience and deepen their connection with the next generation of drinker.

ENVIRONMENT

Rising commodity costs, regulatory pressures, and increased consumer awareness of climate change impacts will see sustainability shift from a 'luxury' to a non-negotiable within the beer industry. Technical innovations across supply and value chains present an opportunity for forward-thinking breweries to reduce costs and increase their sustainable credentials, which will be an increasingly important point of difference for both retailers and consumers.

TECHNOLOGY

Machine learning and AI products won't lead to a revolution in beer but will offer many opportunities for breweries to become more efficient, especially in supply chain and resource management. Conversely they will bring into sharper contrast the value of beer's distinctly human qualities, such as connection, craftsmanship, and creativity.

HORIZON 1 - ECONOMY & WORK

Shifting aspirations: the rise of 'softer' values driving beer drinking habits

The beer category - from products to retail and brands - has always evolved to meet the needs of the time.

As we move towards healthier relationships with work and status, successful beer businesses will build strategies to tap into the new values and behaviours that centre around balance and flexibility. Go where the people are and give them what they want. At the heart of this is **community** - it's where people are spending more of their time, it's what's bringing them together and it's where they want to be.

🛒 RETAIL**Occasions**

Invest in where your drinkers are going

Future of on-trade

Re-evaluate your neighbourhood vs city-centre focus

Taprooms

Build your community value and placemaking power

Future of off-trade

Elevate the at-home experience

Distribution

Build profitability through community

📢 BRAND / MARKETING**Brand meaning**

Tap into the warmer values that underpin community

Audience

Go from targeting to community building

Effectiveness

Build word of mouth and community advocates

📺 PRODUCTION**Cost conscious quality**

Make beers your community want

Portfolio

Build for communities versus categories

Warning

Beware brand dilution

'Go where the people are and give them what they want.'



HORIZON 2 - HEALTH

New mindful drinking

Beer is entering a new era of mindful drinking.

As low, no, and mid-strength beer brands proliferate and new behaviours around moderation evolve at pace, we will see an opening up of new avenues for beer consumption and a blurring of the lines between drinkers and non-drinkers.

The challenge and opportunity lie in how beer brands can contribute to a well-rounded life that meets physical health needs and social wellbeing.

Brands can win by focusing on social connection, quality, and innovation, especially in no and lower alcohol products and experiences. As well as by underscoring craft beer’s longstanding message of quality over quantity.

 RETAIL

- Categorisation**
Don’t wait for the category, follow the consumer
- Channel Strategy**
Look for non-traditional channel opportunities
- Invest**
Build community spaces over drinking spaces

 BRAND / MARKETING

- Targeting**
Understand what a healthy lifestyle means to your community
- Transparency**
Help consumers to make more informed choices
- Premiumisation**
Striving for quality is a non-negotiable

 PRODUCTION

- Serve and quantity**
Look beyond the pint and 440ml can
- Innovate**
Explore the white space of your community’s healthy lifestyle choices

‘Brands can win by focusing on social connection, quality, and innovation...’



HORIZON 3 - IDENTITY & MARKETING

The next generation of beer drinkers

Gen Z's desire to connect with each other plays into beers' ability to bring people together.

However, the anglo-male roots of the category, the 'norms' of the pub experience, as well as the more rigid categorisation of beers' styles, can act as barriers to these consumers on the horizon.

Beer and breweries need to gain relevance by being more inclusive and allowing new identities and rituals to flourish. This is about being innovative with experiences delivered at product and brand levels, and ensuring brand values connect with the diversity demanded by new drinkers and non-drinkers.

** RETAIL****On-trade**

Develop social and community function

Channels

Target experience led channels

Online

Build your presence online

** BRAND / MARKETING****Appeal**

Emotional resonance over hype

Premiumisation

The age of customisation and personalisation

Influencers

Build your community advocates

** PRODUCTION****Planning & Process**

Be agile

Innovation

Be flavour led

Provenance

Create a resonant story

'...gain relevance by being more inclusive and allowing new identities and rituals to flourish.'



HORIZON 4 - ENVIRONMENT

Sustainability as strategy: good beers' competitive edge

Technical innovation in products and processes across supply and value chains is here.

The opportunity is for good beer brands to lead the way. Sustainable credentials will be table stakes before long - investment must start now.

Driven by costs, regulators and retail, sustainability will no longer be a mere add-on; it will be a decisive factor in customer and consumers' purchasing decisions; it will be integral to the value equation alongside brand, price, ABV, and flavour.

🛒 RETAIL**Pricing**

Competitive pricing through new local practises

Point of sale claims

Sustainability ratings on cans

📣 BRAND / MARKETING**Positioning**

Plan for how it integrates into your brands and comms

Authenticity

Beware of greenwashing

Activation

Beer and connecting to the environment

🏭 PRODUCTION**Efficiency**

Get the data and benchmark

Location

Brewery partnerships

Innovate

Use AI to reduce waste



'The opportunity is for good beer brands to lead the way.'

HORIZON 5 - TECHNOLOGY

Crafting value: beer in an AI-driven world

AI will optimise not revolutionise beer.

Big brewers will lead the way, but smaller breweries should prepare to harness AI as a tool to boost efficiency and sustainability, optimising supply chains, sales channels and resource management.

The real value of beer lies in its human-centric qualities—craftsmanship, creativity, and social connection. While AI enhances processes, it's these human elements that define a brand's uniqueness and drive value. Successful brands and businesses will protect this.

RETAIL**Off-trade**

Build an immersive off-trade experience

Recommendations

Create more personalised recommendations

Safety

Lean into adjacent AI innovations like automated driving for new beer opportunities

Logistics optimisation

Improve distribution and logistics

BRAND / MARKETING**Material Quality**

Unlock more of craft beer's material and human value

Marketing

Embrace a new underdog, us vs them opportunity in comms

Comms

Lean into language and translation tools to grow in new markets

PRODUCTION**Brewing**

Optimise processes and better maintain equipment

NPD

Co-create, scale, evolve and improve recipes using AI

Sensorials

Unlock improved means of flavour profiling

Forecasting

Better analysis and prediction of consumer tastes

'AI will optimise not revolutionise beer.'



Thank you

Thank you for reading We Are Beer Horizons 2024.

This is all about sparking conversations about the future of beer, so let us know what you thought!

Please get in touch with us if you want to discuss any of the topics covered in our report further:

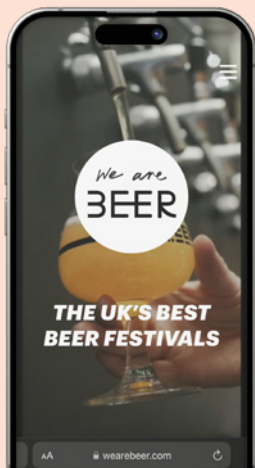
Greg@wearebeer.com

Or, if you'd like to share your thoughts amongst our community, you can join the conversation on our [site](#) or on [LinkedIn](#).

Please keep an eye on our social platform or our emails for information about upcoming Horizons talks and events.

We Are Beer 2024.

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HAVE YOUR SAY

As we develop this project we'd love to know what questions this report has raised for you, and whether there's anything on which you'd like to get insight in 2025.

Please leave your questions here:

typeform.com



