



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



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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



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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

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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.

Contents



01

ECONOMY & WORK

Shifting aspirations:
the rise of soft
values driving beer
drinking habits

Page 1 →



02

HEALTH

New mindful drinking

Page 10 →



03

IDENTITY & MARKETING

The next generation
of beer drinkers

Page 18 →



04

ENVIRONMENT

Sustainability as
strategy: good beers'
competitive edge

Page 26 →



05

TECHNOLOGY

Crafting value: beer
in an AI-driven world

Page 35 →

HORIZON 1 - ECONOMY & WORK

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

As the world of work changes and economic challenges persist, ideas around aspiration and status are shifting. This change is creating a 'softer' set of values, redefining what success looks like and fundamentally changing beer consumption behaviours.

75%

of Gen Z & Millennials
would prefer a job that
offered full flexibility over
one with a high salary*



Navigating towards this horizon

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

Read now →

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

Read now →

PRODUCTION

Cost conscious quality

Make beers your community want

Portfolio

Build for communities versus categories

Warning

Beware brand dilution

Read now →

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



What does this new horizon mean for beer?

Beer is deeply connected with work.

Beer was one of the earliest products to be mass manufactured in the UK. Its development went hand-in-hand with 20th century urbanisation and industrialisation, with a huge expansion of UK pubs clustered around workplaces like factories, forges, and dockyards.

Moving into the era of mass consumerism, the appeal and success of beer lies in its relationship to ideas of work and leisure. From being seen as a reward for hard work, to a symbol of status, beer has long been the signal of the end of work time and the start of leisure time.

But as our relationship with work changed, so did the way we drank beer. A post-work pint was a routine reward upon leaving work, but during the last decade it became an incentive to stay in the office.

Even craft beer had ideas of work at its centre. Much of its early popularity was driven by founder stories - the drinker buying into a rejection of the corporate status quo and the aspiration of being an entrepreneur.

Today, the new working values and behaviours are having a knock-on effect to how we consume beer. Most obviously, the new working patterns mean 'where' (office districts, travel points, nightlife spots) and 'when' (afterwork, end of week) consumption happens will continue to change.

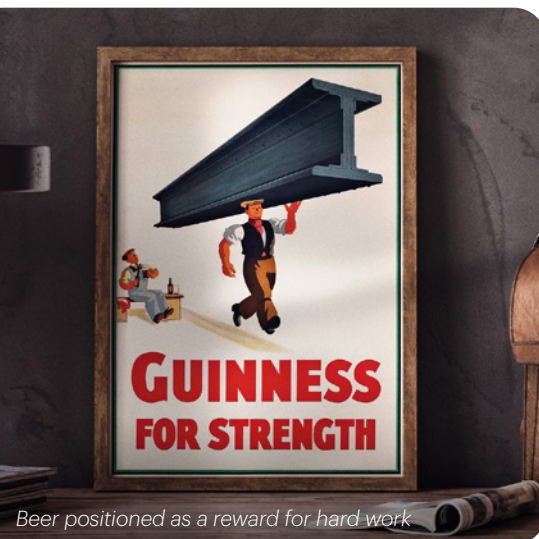
More importantly, on a values level, as ideas of success and aspiration change to centre on balance, flexibility, and community over risk, reward and graft so the needs around drinking beer will change. This will alter the typical needs and experiences people look for from stress relief or release, to pleasure and communion.



More than

1 in 3

UK workers now see drinking with colleagues as 'outdated'*



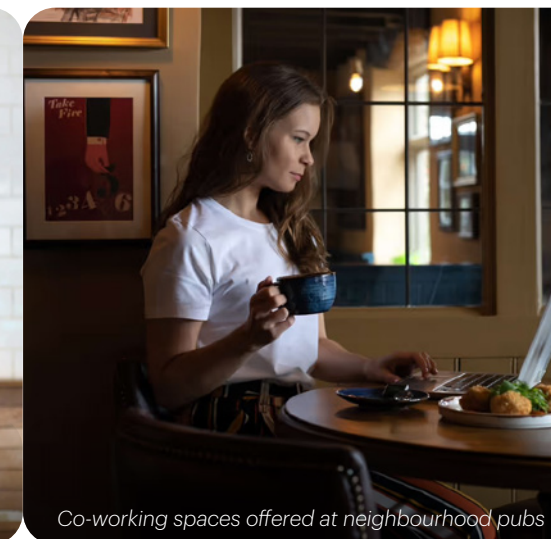
Beer positioned as a reward for hard work



WeWork's famous 'free beer' taps



James Watt and craft beer's 'Punk' approach to work



Co-working spaces offered at neighbourhood pubs

What are the opportunities?

The beer industry—across products, retail, and brands — has always adapted to meet the needs of its time.

As we move toward healthier approaches to work and status, successful beer businesses must align with the evolving values and behaviours around work and leisure.

To succeed, meet people where they are and deliver what they want. At the core of this change is community. People are spending more of their time there—and it's where they truly want to be.

RETAIL

OCCASIONS

Invest in where your drinkers are going

As the 'where and when' of beer occasions broadens, brew the beers, make the brands and invest in marketing activations that tap into these growing occasions.

A 2024 Heineken report and our own We Are Beer 'Good Beer Drinker 2024 Report' points to some of these examples of new widening beer occasions:

- Brunch, sunday lunch, midweek at home dinner, afternoon meetings, taproom days, activity / post exercise evenings.
- The ability to understand your community's needs and occasions will be key to building successful brands and an effective portfolio.

FUTURE OF ON-TRADE

Re-evaluating local and city centre

Breweries are going to have to get used to different demands from on-trade customers.

The neighbourhood pub will increase in growth as people spend more time in their communities. Pubs are already evolving their community offer to meet these needs - incorporating environments for coworking, offering daytime and weekday food options, business meeting spaces, hot-desking, and multigenerational community use.

Outside of the pub, neighbourhood-centric café/bar spaces catering for morning coffee through to a nightcap, are already meeting different consumer groups' needs - these spaces will offer more opportunity for beer.

At the same time, there's scope in city centres for **destination experiences**. The counter-trend to this renewed neighbourhood focus is that some city centre locations will position themselves as experiential destinations, delivered at scale.



'Bier Palace' Albert Schloss is a great example of a destination experience, as are our day festivals

 RETAIL...
TAPROOMS

Build your community value and placemaking power

As production / consumption spaces, taprooms meet many of the policy and place making needs of today's developers, and with the new UK government putting community building front and centre of re-igniting our economy, this presents a huge opportunity for beer businesses.

Taprooms can be the pubs of the future in many ways, if we focus on the value of its community building potential (not just the quality of the latest release).

FUTURE OF OFF-TRADE

Elevate the at-home experience

With the drinkers' world being more centred around home, this means off-trade occasions are growing, and the experiences are more important.

Occasions around beer and food at home - particularly mid week - will continue to grow and breweries need to tap into that. Quality No and Low offers help cement these midweek habits and make them more accessible.

Mash Gang's tagline of 'Ultra Premium Craft Nolo' speaks to this need for quality beer, made for a midweek at home occasion

People will not want to compromise between on-trade options and off-trade - seeking quality offers through local stores or direct-to-consumer delivery. National grocers will want to localise and tailor their offers to match local taste preferences and brands.

DISTRIBUTION

Building profitability through community

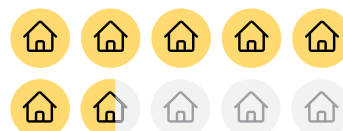
National distribution and brand building is hard for profitability - every mile a keg goes, impacts the bottom line.

Those looking to expand nationally may be better served focusing on specific neighbourhoods and localities over 'regions' or 'cities'. Building through communities can be a better means for national / regional growth.

Both in local and national sales, exploring spaces beyond the fight for taps in pubs will help build presence - e.g. cafés, restaurants, delis, music / arts venues and cinemas.



Orbit Brewery Taproom in South London



66%

of beer drinkers drink beer with food at home,
3rd biggest beer drinking occasion*



Non-league football grounds are the perfect community spaces for good beer

BRAND / MARKETING

BRAND MEANING

Tap into the warmer values that underpin community

While 'beer as reward' still matters, it's less bound up with traditional masculine ideas of achievement and attainment, and is more about one's own inherent self-worth. The continued strength of Spanish lager - tapping into fond memories of holidays, people and place - illustrates this.

Similarly, super premium brands in craft and ale sectors - whether national or local - are putting provenance and community at their core. This will grow.

Some craft beer brands like Ideal Day are already living out these new values in their proposition. Similar to premium restaurant and food brands, its story represents much of the idealised version of the great re-evaluation: a return to a quieter, calmer life, one without hustle at its core. Where employee and consumer brands increasingly cross-over this will be ever more important for brand managers to think about.



New Ideal Day website

AUDIENCE

Go from targeting to community building

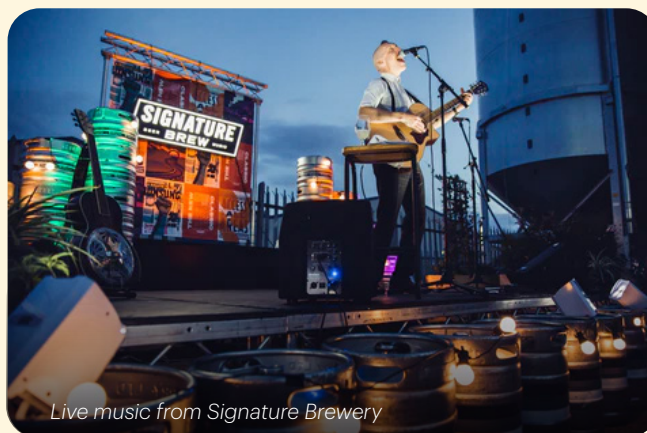
For most, building community brands will be vital to success.

Knowing who your community are and connecting with them consistently is key as people spend more time in these spaces.

That might be in your own backyard like Attic in Birmingham, Left Handed Giant in Bristol or Five Points in Hackney.

Or it might be through culture like Signature Brew has done with music, or as Mikkeller has done with running.

Marketing investment in these places - physical or digital - has to be super targeted and relevant.



Live music from Signature Brewery

EFFECTIVENESS

Build word-of-mouth

Building brand resonance in these communities is key to driving sales and marketing effectiveness. Ultimately, word of mouth referrals are more powerful in driving purchase than typical sales funnel communications.

This will only increase as people spend more time in their communities and identify more closely with them.

Pushing people along the typical 'awareness to purchase' funnel via communications will become more tough.



Left Handed Giant's run club has 7.5k Instagram followers in Bristol

 PRODUCTION
COST CONSCIOUS QUALITY

Make beers your community want

Consumers will continue to look for the best value, without up-ending their own sense of worth.

For sustainable scale and rate of sale, breweries need to centre their offer on what their communities want and build the products that meet their social / status needs, as well as their financial ones.

Though there will always be special purchases, for craft beer breweries to grow, they need to move away from creating ultra premium and from focusing too heavily on driving appeal through through hype and exclusivity.

PORTFOLIO

Build for communities versus categories

Successful breweries will have a portfolio where each beers' role is in meeting a need of their community, rather than jumping on a growth style. (Brut IPA anyone?)

With its scope for an interplay of styles, collaborations and ingredients, modern beer is a brilliant platform for addressing this creatively.

WARNING

Beware brand dilution

In many ways businesses are reflecting the market. Breweries, like their drinkers and communities, will still have growth ambitions but should be authentic and truthful to brand.

Less growth because we can or we should, but more growth because we've grown our community or audience, or we've found other like-minded groups to grow into.

If not, are we over stretching and diluting our brands?



Northern Monk - Faith - the fastest growing Hazy Pale in the UK



Brewery Stonewall IPA

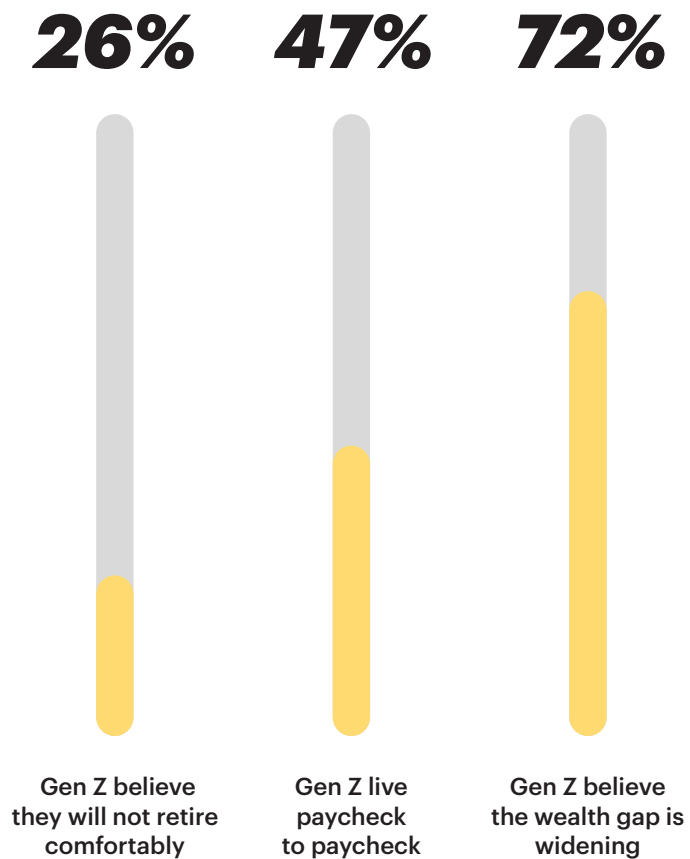


Rogue Ales - Sriracha Stout

What's driving this new horizon?

Millennials and Gen Z especially, have spent their entire working life in a slowly stagnating economy.

The promise that ambition and hard work will lead to material progression is broken and so a new set of aspirations, status criteria and lifestyle markers have evolved accordingly.



The 'Grindset' and 'Hustle Culture' (echoed in much of the language and imagery in Craft Beer) of the 2010's has been replaced by ideas like '[Soft Life](#)' and 'Quiet Quitting'**.



"For millennials and the younger Generation Z and Alphas, who may never be able to afford to buy a home or retire at a reasonable age, there is a growing feeling that hard work is fortifying a system that, at best, is giving them nothing back and, at worst, is actively screwing them over. And so the 'soft life' revolution was born – where the priority is no longer about working yourself to the bone to be a #girlboss or 'leaning in' to the corporate male world, as former Facebook COO Sheryl Sandberg wrote, and pushing until you 'have it all'."

[The Guardian](#)**

Building on this, the hard stop of the COVID-19 pandemic ignited 'The great re-evaluation' whereby people of all working age groups re-appraised their relationship with work and the workplace. This re-evaluation focussed on the compromises they were willing or unwilling to make for a mode of working that no longer felt necessarily productive, nor empathetic.

“One of the biggest career aspirations for young people these days is ‘balance’. You would think at a time of economic hardship it would be salary, which is of course important, but the idea that we can have some kind of autonomy and control in order to live really fulfilling lives is key. In other words, aspiration based less on the idea of ‘career ladders’ and more on our own judgement of what makes a good life.”

Annie Auerbach

In practical terms, for many remote and flexible work is now the norm. Driven by cloud-based systems, communication innovations, and accelerated by the pandemic, this new working pact fundamentally shifts locations and patterns of work, and by extension, leisure time.

“The scale of the disruption we’re experiencing now has not been seen in the workplace for a hundred years.”

[Julia Hobsbawm](#), author of 'The Nowhere Office'

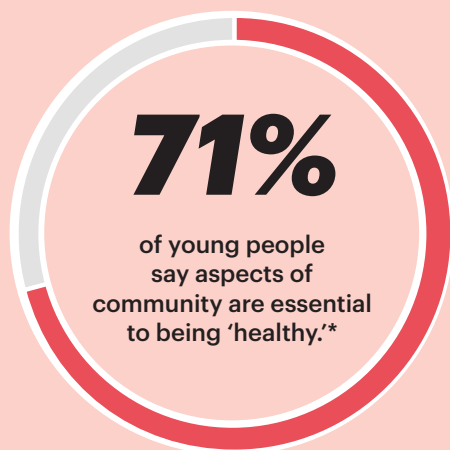
The economic picture and people's place within it is making many look for these more balanced and fulfilling worlds that fit the lifestyle they seek, as well as the new values and aspirations they now hold.



HORIZON 2 - HEALTH

New mindful drinking

Ideas of health and wellness are moving toward a more empathetic approach, one that encompasses physical, mental, and social well-being. We are entering a new phase of mindful drinking that prioritises community and connection, as well as moderation - breweries must respond to this opportunity.



Navigating towards this horizon

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

[Read now →](#)

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

[Read now →](#)

PRODUCTION

Serve and quantity

Look beyond the pint and 440ml can

Innovate

Explore the white space of your community's healthy lifestyle choices

[Read now →](#)

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



What does this new horizon mean for beer?

Beer is walking tightrope, with people increasingly weighing up beer drinking's negative health outcomes against positive social ones.

Heightened awareness of alcohol's negative effects, such as disrupted sleep and 'hangxiety,' challenge beers' appeal, particularly among Gen Z. At its worst, beer can still be associated with binge-drinking, something increasingly out of step with a population under more social, economic, and psychological pressure than previous generations.

The proportion of non-drinkers increased from 16% to 19% between 2011 and 2022, and the highest prevalence of non-drinking was among adults aged between 16 and 24 at 26%*

Despite this, pubs, and taprooms remain vital social hubs as beer continues to drive connection and community. Beer spaces and occasions can be crucial for alleviating loneliness and isolation.

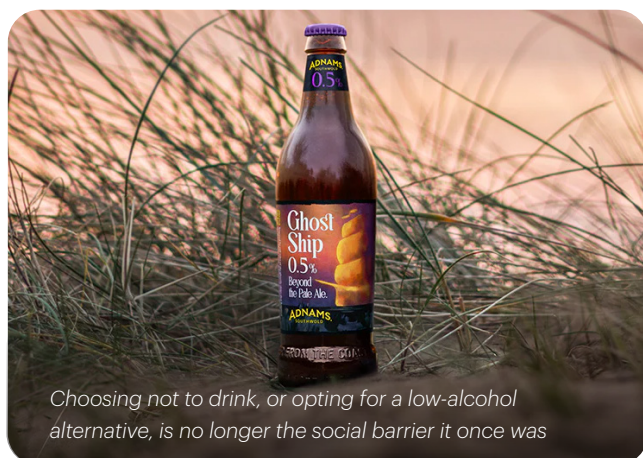
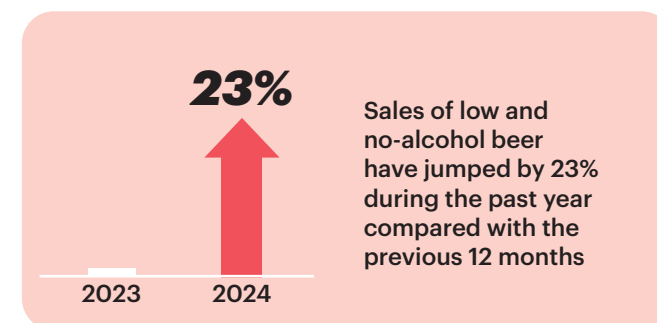
One of the key successes of the craft beer revolution was its revitalisation of this sense of community, at a time when many pubs were beginning to shut down. As mentioned in [Horizon #1](#), craft beer breweries and taprooms are often seen by developers and placemakers as cornerstone businesses of new, young, healthy communities.

Furthermore, choosing not to drink, or opting for a low-alcohol alternative, is no longer the social barrier it once was. In fact there is more celebration in choosing to be sober in certain moments or periods.

The increasing availability and normalisation of low and non alcoholic alternatives is helping to mitigate beers' negative effects. It also means those not drinking alcohol at any given moment are able to enjoy a premium, grown-up beverage and share in beers' social drinking rituals.

We're already seeing a shift away from the binary of 'drinkers' vs 'non-drinkers' and towards more mindful drinking, as experts like Dr. Emily Nicholls suggests.

The rise of mindful drinking will only serve to underline craft beer's emphasis on quality over quantity. Amid these shifting norms, we are entering a new era of mindful and moderate beer drinking.



Choosing not to drink, or opting for a low-alcohol alternative, is no longer the social barrier it once was



"I think that there's been a kind of wider cultural repositioning of sobriety and non drinking. So a move away from the 'recovery / problem drinking / Alcoholics Anonymous' narrative towards this more celebratory kind of wellness focused, individual lifestyle choice. 'I'm not stopping drinking because I had a problem. I'm not an alcoholic, [drinking less] just helps me sleep better and be more productive.'"

Dr. Emily Nicholls

What are the opportunities?

Beer is evolving to meet the demands of a new era of mindful consumption.

With the rise of low, no, and mid-strength beer brands, new possibilities for beer consumption are emerging, blurring the distinction between drinkers and non-drinkers. Beer's messaging is likely to shift from a focus on 'release' to one that highlights social connection and shared experiences.

The key challenge—and opportunity—is how beer, as a product, culture, and industry, can support a balanced lifestyle that addresses both physical health and social wellbeing. Brands that prioritise social connection, quality, and innovation, particularly in the low and no alcohol space, will thrive. At the same time, they should continue to emphasise good beer's enduring message of quality over quantity.

RETAIL

CATEGORISATION

Don't wait for the category, follow the consumer

When it comes to innovating and leaning into the opportunities around mindful drinking, good beer brands and brewers shouldn't be held back by the slow changing nature of retail categorisation.

As long as brewers / brands can prove they understand this new mindful drinking consumer and can build a product they want, retail will adjust accordingly. It's better to have a first mover advantage in a less distinct category, rather than being late to a well defined space.

Low and No Alternative Brands are creating their own category language such as Botivo's 'Non-Alcoholic Aperitif'



"The world of drinks is becoming increasingly ABV agnostic. People are increasingly more interested in findings super craft, well made liquids with quality ingredients - irrespective of whether it has alcohol in it or not"

Imme, Botivo Co-founder

CHANNEL STRATEGY

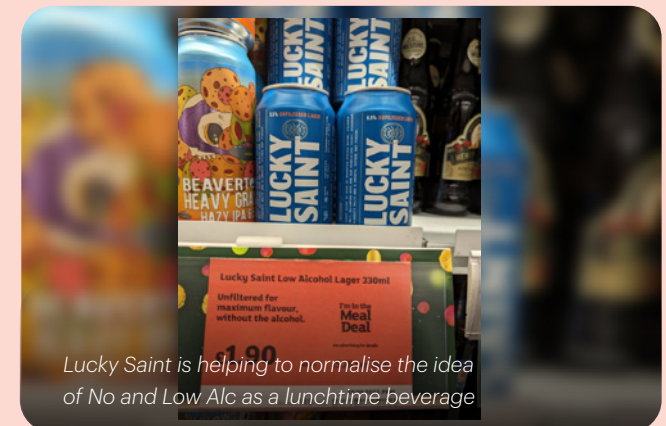
Look for non-traditional channel opportunities

Where is your community making drink choices? Is it where beer is sold today?

The normalisation and growing presence of low and no alcohol beers will open up new retail and sales channels for beers.

Non-alcoholic beers as alternatives to fizzy drinks open up a world of non-traditional channel possibilities, such as vending machines, gyms, petrol stations, non-licensed cafes and coffee kiosks, and more.

However, brands should ensure they avoid 'stealth advertising' and any inadvertent messaging towards children. Marketing here should be creative, but responsible.



Lucky Saint is helping to normalise the idea of No and Low Alc as a lunchtime beverage

 RETAIL...**INVEST**

Build community spaces over drinking spaces

Evolve from creating drinking spaces to creating community spaces. Strong, sustainable revenues will follow.

What do your taprooms, bars or pubs offer those who are electing to not drink beer, but still want to be included in your community?

Activate with community collaborators to nourish your community and build resonance.



BRAND / MARKETING

TARGETING

Understand what a healthy lifestyle means to your community

What a healthy lifestyle looks like varies greatly from person to person and community to community.

By understanding the lifestyle choices your community wants to make (or not make...although the non-alc market is growing this doesn't necessarily mean your brand *has* to be there!), means you can make sure you market not only to their community values, but also to the lifestyle choices they make as individuals. Your role in those lifestyle choices can be key.

Healthy might look like run clubs followed by a non-alc beer

Building your community credentials may be your contribution to a holistically healthy lifestyle for your drinkers.



x.com/GipsyHillBrew

TRANSPARENCY

Help consumers to make more informed choices

Humour has long been how beer is marketed and while there is still a role for it, consumers now want transparency.

A healthy lifestyle is about making better choices. Give people options, so that they can make decisions that they feel help them have a healthier lifestyle.

PREMIUMISATION

Striving for quality is a non-negotiable

New mindful drinking is a key part of the trend toward premiumisation, which is not going away.

A new generation of drinkers are no longer seeking release, therefore promoting quality will be crucial for good beer to meet the desires of new mindful drinkers.

Beer brands should emphasise the great tasting, high-quality products they are making. Where possible, don't compromise recipes to meet price points or target volume consumption occasions that are dying. Not only are these occasions highly competitive, but in the future, their size will be greatly diminished.



“Consumers will still want the option to drink a 15% ABV pastry stout, they’ll just regard it more as a treat. It’s OK to make these, but good beer brands should position them as a treat.

Equally, more no and low alc, gluten free or caloric options mean that consumers can choose when they want it, and where it makes sense.”

Luca Lorenzoni

PRODUCTION

SERVE AND QUANTITY

Look beyond the pint and 440ml can

Evolution from binary consumption choices (alc v non-alc) to a wider degree of choices based on a more nuanced approach to drinking, means tailoring the product experience to the reason people choose it.

Moderation will mean consumers increasingly want greater options. Smaller serves can also reinforce a 'quality over quantity' message.

While larger formats may be perfect for higher energy social occasions, they will be a block to rate of sale for other beers.

Research by scientists show that two-thirds measures instead of pints could boost English health – [Guardian](#)



Two-thirds measures reinforce a quality message

INNOVATE

Explore the white space of your community's healthy lifestyle choices

What innovative products or production processes can be trialled to give a new angle for your beer that will resonate with your community?

For breweries that are working with running, cycling or yoga clubs, what beer or ingredient additions could aid recovery or best meet the needs of the post-exercise social?

The Impossibrew promise of being 'functional non-alcoholic' is an example of non-alc beer aimed at a community who value 'productivity' and are focused on personal betterment

Working to emphasise the healthy lifestyle element while meeting the wants of your community is a big opportunity.



Erdinger Isotonic non-alc fortified with vitamins

ERDINGER ALKOHOLFREI



What's driving this new horizon?

There's a paradox in self-care and well-being: despite healthier bodies, our minds are unhappier.

We feel healthier than ever, embracing plant-based diets, tracking steps with fitness apps, and adopting mindfulness strategies to boost mental health. According to Savanta, a third of UK consumers feel healthier than they did in 2023, with 49% attributing this to 'eating more healthy foods.'

Yet, despite these positive changes, many feel unhappier and lonelier. Anxiety among young people has tripled in the past 20 years. The World Health Organisation identifies loneliness as a significant global health concern affecting all aspects of health, well-being, and development.

According to Alcohol Change UK, 30% of UK men and 26% of women want to reduce their alcohol intake in 2024. 16% (about 8.5 million people) of the UK population were planning to abstain from alcohol in January 2024.

The commercialisation and quantification of health and wellness, exemplified by fitness and wellness influencers may further increase these anxieties. As physical health, mental health, and overall lifestyle become metrics to judge one's performance, productivity, and value, the pressure mounts.

The rise in sober curiosity is embedded within this paradox. While sobriety benefits physical health—fewer hangovers, better liver function, and clearer minds—it also reflects an anxious, stressed-out generation for whom the traditional understanding of 'self-care' doesn't necessarily lead to happiness.

"It's great that we're celebrating self-care culture, but we often take time out to relax just to be more productive at work. When people say, 'young people are drinking less,' it may be in part linked to increased anxieties and mental health pressures."

Dr Emily Nicholls



Mindful drinking communities / spaces are on the rise



The grip of the more toxic elements of fitness and wellness culture may be loosening. A more empathetic and balanced sense of health and well-being is emerging, focusing on quality of life and social and community connections over individual performance metrics.

According to a 2024 Vice Fashion report, 71% of young people say aspects of community are essential to being "healthy."

We may see a more holistic approach to 'self care', one that emphasises pleasure, enjoyment, and acceptance, not just in physical and mental health, but with one's social life and community playing a crucial role as well.



HORIZON 3 - IDENTITY & MARKETING

The next generation of beer drinkers

Identity is fragmenting as people hold less tightly to the conventions of life stage, gender, age, ethnicity and religion. This is creating an ever more diverse set of consumers, which is especially true of younger drinkers.

Gen Z and those who come after are approaching the category with a different set of needs, demands and expectations - they will not accept the status quo.



Navigating towards this horizon

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

Read now →

 **BRAND / MARKETING**

Appeal
Emotional resonance over hype

Premiumisation
The age of customisation and personalisation

Influencers
Build your community advocates

Read now →

 **PRODUCTION**

Planning & Process
Be agile

Innovation
Be flavour led

Provenance
Create a resonant story

Read now →

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



What does this new horizon mean for beer?

Social connection and the building of community identity have always underpinned beer's appeal.

However, a new generation of drinkers want to see themselves represented in beer - their values, preferences and tastes - before they join, rather than simply conforming to its traditions and norms. By broadening the idea of who beer is for, the rules of where and how it's drunk and what it tastes like, we can make beer feel more inclusive.

Traditionally beer and pubs were largely the preserve of the white, working class, middle-aged male community. Although early social movements such as the 'reformed house' movement of the early 20th century tried to make pubs welcoming to women, it wasn't until the 1990s that the idea of pubs

as exclusively male spaces was shaken up. This was at least in part, thanks to a combination of third wave feminism and 'Cool Britannia' giving rise to the idea of 'the Ladette'.

More recently, the inherent 'whiteness' of pubs has been called into question, with writers like David Jesudason presenting new, alternative histories of British (pub) culture. His recent book *Desi Pubs* sheds light on the untold story and cultural contribution of British South Asian pubs.

And yet, so far much of this has been ignored or written out of the beers' story.



Lorraine Copes, founder of Be Inclusive Hospitality, points to a similar use of pubs in Birmingham as spaces for the Jamaican diaspora:



"In the 80s and 90s in Birmingham, there were a lot of Jamaican run pubs with dominoes and food - it was like a 'little Jamaica' but in a pub environment, and that embodies what a pub is."

Lorraine Copes

This diversification and reimagining of beer is also happening at a product level. The proliferation and increasing popularity of fruit forward styles like sours, as well as brands like Jubel, point towards a strong demand from younger drinkers for a more diverse range of flavour profiles in beer.

Recent category successes like fruit forward hazy IPAs, products created by brands like Jubel, as well as some of the innovation in fruit additions and modern sours speak to this trend.

Put simply, the new drinker has entered a much more diverse drinks category and is less bound by style categories and their significance. Furthermore, at a time when previous social rituals centred around the pub (i.e post-work drinks) are shifting, we see new rituals emerging, and an overall broadening out around the expectations and experience of beer spaces.

The explosive growth of competitive socialising, from board game bars to mini-golf, darts, ping pong and shuffleboard is another example within this shift.

Chance & Counters, a board game bar with five sites across the UK, have collaborated with Northern Monk on a Tropical IPA to be drunk whilst gaming.*

Young drinkers are less rigidly sticking to the category, and are instead looking to create their own rituals and behaviours when it comes to drinking beer, socialising and finding community in pubs, taprooms and festivals.



“Flavour is the number one factor in choice, and younger consumers are also moving towards more sessionable, lower bitterness beers.”

Stephan Pietge,
Arlington Capital
Advisors



BrewDog Hazy Jane playing into flavour first decision making

What are the opportunities?

Beer's ability to unite people aligns with Gen Z's desire for connection, both online and offline.

However, its traditional anglo-male image, pub culture, and rigid style categorisation may hinder its appeal to emerging consumers looking for experiences speaking to them, and not buying into the status quo.

To stay relevant, breweries must embrace inclusivity, fostering new identities and rituals through innovative products, experiences, and brand values that resonate with a diverse audience.

RETAIL

ON-TRADE

Develop social and community utility

Taprooms can be the pubs of the future in many ways; a blank canvas to build social activity for your community, inviting people to enjoy your products in new ways.

Brockley Brewery hosts a beer and yoga night in its taproom, showing new connections between holistic wellness, beer and social connection.

Similarly, pubs are expanding their community utility and will need to do so to meet the next generation of drinkers.

The clubs, events, activities organisers will make your on-trade experience a community destination.

CHANNELS

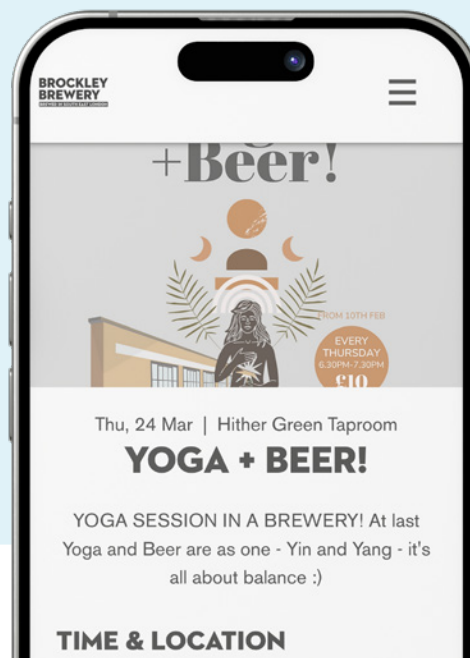
Target experience led channels

Lean into the experiences the next generation are investing in.

Music and arts festivals, travel experiences, outdoor activities, sports events, club and festivals, galleries and gig venues - all tap into the need for shared experiences; this will only continue to grow.

Beavertown collaborated with suicide prevention charity CALM (the Campaign Against Living Miserably) and London Climbing centres to promote their non-alc beer during Dry Jan.

Finding the right experience channel for your community could be an avenue for regional and national growth.



Yoga night at Brockley Brewery



BRAND / MARKETING

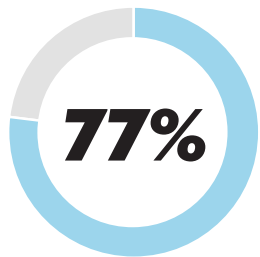
APPEAL

Emotional resonance over hype

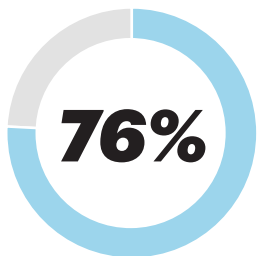
Don't over invest in hype. Scarcity and hype work, but they target only one, small consumer type, motivated largely by status.

While this is an important consumer for craft beer, the majority of breweries are playing here and it can feel too exclusive.

To grow and sustain, we need to move brands beyond hype. Instead building brands that establish a deeper human connection and connect with a greater diversity of consumers.



of Gen Z believe it's important for businesses to customise interactions, while...



are looking for companies to send them digital communications they can customise based on their preferences.

PREMIUMISATION

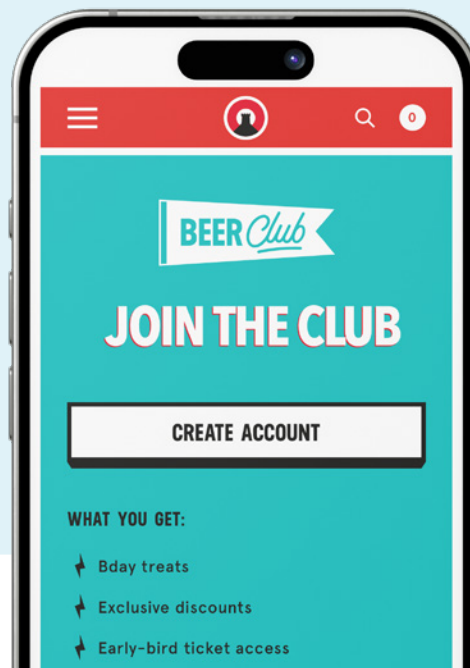
The age of customisation and personalisation

This generation of drinkers are spoilt for choice and are looking for experiences over possessions, as they build social currency and personal brand.

Brands that will win are those that feel tailor made to their audience.

People don't need, or want, to work hard to build a relationship with a brand, the brands need to 'get' them, and connect them to like-minded people.

Camden Town focuses on creating a community through its beer clubs which are focused more on 'bday treats' and discounts, than exclusive or limited edition drops.



Camden Town beer club

INFLUENCERS

Build your community advocates

Although 'influencer' can feel like a dirty word these days, trusted endorsements have always helped build brands.

Much of modern beers' success was built through social media influence. This isn't going away.

Celebrity influencers are costly and are likely to feel inauthentic to many consumer communities. Brands should instead look to build relationships with non-celebrity, micro influencers that are part of, or speak to, those communities.

Fostering these relationships will be key, and is a skill that should be developed.



Vault City collaboration with Ed Gamble

PRODUCTION

PLANNING & PROCESS

Be agile

Beer is not as agile as it might like to think, particularly in relation to other drink categories.

The age of customisation and personal experiences mean people want something that speaks to them.

Outside of a core craft audience, the romance that built production doesn't connect.

How can you adapt production and portfolio to meet a new generation of drinkers' diverse needs?

INNOVATION

Be flavour led

Gen Alpha will pick up from Gen Z as an even more diverse audience. They will seek to pull inspiration from new areas and reject norms of categorisation. This will mean an even greater need for diversity in flavour and choice.

Don't be hemmed in by tradition. Instead, be open minded and expansive in your approach to flavour profiles.

PROVENANCE

Create a resonant story

New, novel and interesting ingredients, processes, influences, and collaborations allow us to create products that speak to new communities of drinkers.

Your portfolio of products should tell a story that represents your community.



Brooklyn's global fonio collaboration - bringing flavour, values and community together in an innovative product series

What's driving this new horizon?

The conventions and norms of gender, age, culture and life stage are loosening, meaning that identity is no longer simple or static but increasingly complex, diverse, and fragmented.

This shift has led to a broader definition of what is 'normal' and a proliferation of consumer identities needs and values.

"One in 15 people (almost 7% of the UK population) changed their sexual identity over a six year longitudinal study of UK households between 2011-2017*, with women aged over 65 being one of the most 'sexually fluid' groups," according to research by Lancaster University.

Despite the diverse array of needs, one remains universal: the desire for connection and affiliation, particularly as identity markers become more fluid. Finding allies and developing allegiances with those who share the same values and approach to modern life remains central to people's lives as they navigate the fragmented consumer and social landscape.

"Seven in 10 UK adults agreed it was important to feel part of their community, with the majority (64%) saying they were willing to work with others to improve their local area," according to research by Savanta on behalf of The National Lottery Community Fund.

It's not just the increasing need for affiliation; it's also how these bonds are formed that is changing, especially for the social media natives of Gen Z and Alpha. The blend of digital and physical socialising, such as asynchronous communication and chat-connected gaming, means that friendships are made, maintained, and experienced in qualitatively different ways than for previous generations.



"Young people prefer to triangulate their socialising, so there's a third activity they're focused on and collaborating to do together. This can be running clubs, gaming, or doing something creative together and is easier than diving straight into a face-to-face 'hey, how's life?' conversation, especially when meeting new people."

Annie Auerbach

HORIZON 4 - ENVIRONMENT

Sustainability as strategy: good beers' competitive edge

The next five years will see sustainability shift from being an expensive 'nice-to-have', to a fundamental necessity.

This era will be driven by commodity costs, top down pressure from regulators and large retailers, and bottom-up pressure from consumers as the impact of climate change hits closer to home.



Navigating towards this horizon

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

Read now →

BRAND / MARKETING

Positioning

Plan for how it integrates into your brands and comms

Authenticity

Beware of greenwashing

Activation

Beer and connecting to the environment

Read now →

PRODUCTION

Efficiency

Get the data and benchmark

Location

Brewery partnerships

Innovate

Use AI to reduce waste

Read now →

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



Simpson's Malt plans to achieve carbon neutral malting by 2030

What does this new horizon mean for beer?

As an agricultural product, beer is inherently resource-intensive, not to mention the energy required for its transportation.

The whole supply chain is increasingly aware of its environmental impact. As we move forward, previously 'good' sustainability credentials will be regarded as table stakes.

With energy costs rising and stricter regulations on the horizon, we're poised for transformative shifts in beer production, from agriculture practices through the brewery to the end user. Although craft beer's 'boot-strapped' approach has often lagged in sustainability, this will no longer be an option.

There are promising signs and development that illustrate the potential for change. For example, Gipsy Hill Brewing Co. won a We Are Beer Top 50 UK Beer special award for Swell, the first carbon negative beer made without using offsets.

“Gipsy Hill changed so much about its processes to make carbon-negative beer. The team bought regenerative barley, malted it in Warminster, and controlled that process themselves; they reused hops and built a system to extract more flavour from them; then they delivered locally in electric vans and worked with Waitrose to use reusable containers instead of cardboard boxes... I don't think they got enough credit for an incredible process.”

George Wade

Closer scrutiny and tracking of data during all stages of production is a big enabler of this shift, but the push for change is coming top down also. Major retailers are demanding breweries measure and report their environmental impact to meet their own emission reduction targets;



“The likes of Tesco, Waitrose, and Sainsbury's are saying to breweries, 'You've got to start measuring your impact.' They have set targets to reduce emissions as a business, so they rely on breweries like Gipsy Hill, Deya, and Two Tribes to measure, reduce and report their climate impact. This puts the leading industry brands at the forefront of driving sustainability impact.”

George Wade



“Let’s say your brewery uses nine litres of water to make a litre of beer and you reduce it to eight over the year. Everyone will pat each other on the back. But what if the industry standard is actually four? Then you haven’t done a good job at all. You need to get these benchmarks so people have a better understanding of where they should be. As people improve, the industry standard will rise, forcing further reductions. Once people have the information and data, they often act on it.”

Chris Lewington

Investment in measuring and processes not only benefits the environment but also improves a brewery’s economic viability. This will signal a big shift in mindset as we enter this new phase for beer. As Chris Lewington told us: “the craft beer mantra of ‘quality at all costs’ is over”. Instead, the focus has to come from breweries and brewers learning how to efficiently produce high-quality beer in the most sustainable way possible.



Gipsy Hill Brewing Co. win a We Are Beer Top 50 UK Beer special award

What are the opportunities?

Now is the time for breweries to integrate sustainable and climate-conscious practices into their operations.

This isn't just an ethical choice; it's a strategic imperative. Being best in class may be an opportunity at the premium end, and being 'good enough' will become fundamental. Critically falling behind will spell trouble with competitiveness and consumer opinion.

RETAIL

PRICING

Competitive pricing through new local practises

The link between a businesses' transport and delivery practices and its carbon footprint is a key indicator of sustainable practice for consumers.

Breweries with highly localised communities can lean into the opportunity to operate more sustainably and more cost effectively by looking at alternative delivery and packaging options.

Returnable packaging like crates, as used by Gipsy Hill, and commonplace in markets like Germany, is one example that can help lower price, reduce cost and build better environmental credentials.

Beer can learn from coffee also; London coffee roaster Caravan ships coffee in reusable plastic buckets via electric van, reducing packaging waste and transport carbon. This allows it to create products at a lower cost and be better for the environment.



Caravan's reusable plastic boxes for shipping coffee beans

POINT OF SALE CLAIMS

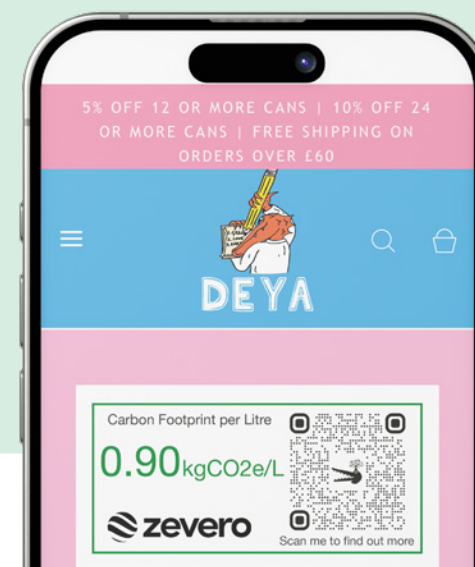
Sustainability ratings on cans

It is highly likely future off-trade environments will feature 'sustainability standards ratings' on cans, akin to the traffic light system for calories and sugar.

This will influence consumer choices and reduce the need for brands to heavily market some of their sustainability efforts.

The on-trade may well follow, led by more conscious operators.

Working with Zevero, Deya has established the carbon footprint for each one of its beers in cans and kegs. They call this their 'Product Standard' and have each and every style of beer measured and the information displayed on their cans.



Deya has calculated the carbon footprint per litre

BRAND / MARKETING

POSITIONING

Plan for integration into your brands and comms

Your brand's sustainability credentials are moving from a 'nice to have', to, increasingly, the largest retailers demanding it. So having your position and information present in marketing and sales communications is an increasingly urgent need.

While falling below the standards (albeit yet to be defined) will impact sales, breweries will have to make a call on whether they invest in getting to the accepted levels or go beyond to become industry leaders.

While not everyone can lead that charge, nor should they, we think it will only grow as industry champions are put forward by larger retailers.

AUTHENTICITY

Beware of greenwashing

As consumers, especially in the craft beer community, become more sustainability-savvy, the tolerance for greenwashing will plummet.

Building on this, the era of carbon credits as a badge of sustainability is over. Brands that merely signal sustainability without real action will face increasing scrutiny.

BrewDog's exit from the carbon credits market to 'focus on reducing emissions in our operations and supply chain' signals that genuine, substantive change is what companies must strive for over carbon neutral claims.

ACTIVATION

Beer and connecting to the environment

As awareness around agriculture and our impact on the environment grows, food and drink choices that facilitate connection with nature and the environment will proliferate.

Beer, alongside wine (but more so than spirits and other drinks), is a simple agricultural product that has great environmental storytelling potential.

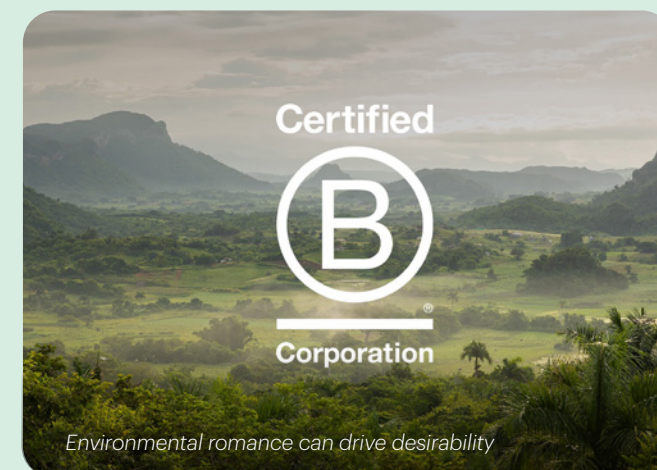
It might not be right for every beer, but increasing environmental romance around your brand will play a role for many in driving desirability.



Brewgooder - success through purpose



Shift sustainability focus



Environmental romance can drive desirability

PRODUCTION

EFFICIENCY

Get the data and benchmark

From carbon to water, from the brewhouse to the supply chain, auditing and benchmarking brewing and logistical processes will be critical to making strides forward.

Innovative companies like Zevero and Brew Resourceful are already helping breweries with this process - setting new industry benchmarks by measuring, reporting and reducing emissions across brewing processes. As adoption grows, new industry benchmarks will emerge. This will drive continuous improvement.

However, brewers can't solely rely on data and AI-tools to optimise their way to sustainability. Breweries/brewers themselves will need to think holistically, and have an appetite to learn how to efficiently produce high-quality beer whilst leaning into innovation.

Northern Monk worked with Brew Resourceful to evaluate its water usage and this helped save 28% of Northern Monk's water usage. This worked out as 7,608,500L, equating to £41,000 savings per year.

LOCATION

Brewery partnerships

While some beers are inextricably linked to the place of their production many are not. Contract brewing and brewing under licence have long been fundamental parts of beer production.

In response to climate-conscious consumer demands, shifting regulations from market to market, as well export uncertainties, breweries may look to produce regionally.

Alternatively, they may look to bring production of multiple brands together under one roof so as to produce greater volume more efficiently.

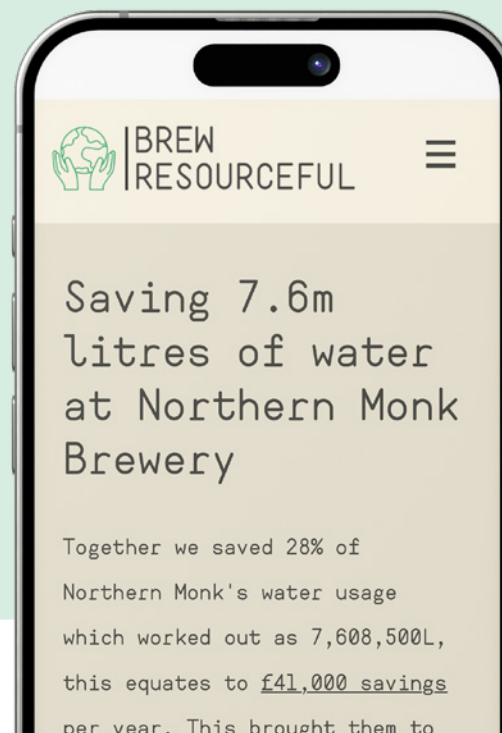
INNOVATE

Using AI to reduce waste

One of the biggest challenges in beer is resource overuse, so perhaps the most exciting advancement AI can make for breweries is in reducing waste.

Used effectively AI / machine learning tools can help with better analysis of brewing data and can lead to optimised water, energy and raw material usage.

This can extend into running brewhouse and supply chain logistics as energy efficiently as possible.



Northern Monk measuring their water usage



"Artificial intelligence (AI) is revolutionising the brewing industry, and its impact on sustainability efforts is undeniable"

Ankara Napa, iWort

What's driving this new horizon?

The shift from viewing sustainability as a distant concern to recognising it as a pressing daily reality will continue to gain momentum.

Over the past decade, as a society we've moved from simply being aware of environmental issues to actively addressing them through regulation, investment, and innovation.

60% of Britons agree that climate change is the biggest threat to civilization.

21% of Britons are willing to invest more in products that favour sustainability.

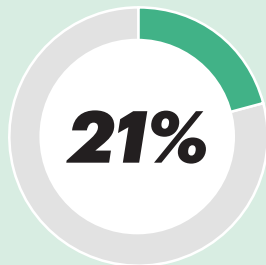
This shift has led to a surge in accessible and affordable sustainable innovations and technologies, reducing the barriers for both businesses and consumers to adopt green practices.

The economics of sustainability are also changing, with more businesses recognising that sustainable practices are not only good for the planet but also beneficial for their bottom line. Rising energy, transportation, and raw material costs make sustainable operations more cost-effective. Expected regulations and financial implications for non-compliance reinforce this trend.

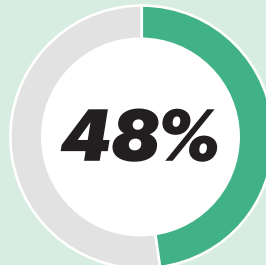
Increased energy prices have forced 89% of small businesses to review their energy use, leading many to adopt greener practices, according to Novuna Business Finance.

48% of companies report that technology-led sustainability initiatives increase revenues, according to Accenture.

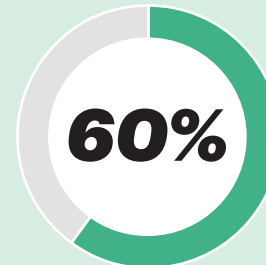
Consumers are demanding more transparency and sustainability from the brands they support. They are frustrated with the burden placed on them as individuals while major polluters engage in greenwashing. Companies that prioritise true sustainability gain a competitive edge, attracting trade customers and investors who also face pressure from regulators and consumers to improve. The notion that sustainability is a costly add-on is being replaced by the understanding that it is a smart, long-term investment.



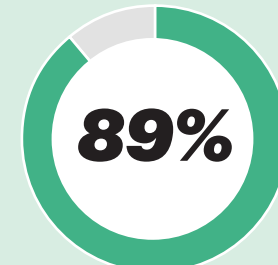
of Britons are willing to invest more in products that favour sustainability.*



48% of companies report that technology-led sustainability initiatives increase revenues.*



of Britons agree that climate change is the biggest threat to civilization.**



of small businesses to review their energy use due to increased prices.***



“The brewery industry is changing the way we think about climate impact and paving the way for actions that consumer businesses can take to achieve their sustainability goals. With more businesses investing into sustainability, we can expect tangible results, ultimately enabling breweries and the wider consumer goods sector to have a positive and lasting impact.”

George Wade

In essence, the movement from awareness to action in sustainability is driven by innovation and economic impetus. As sustainable technologies become more accessible and the financial benefits become clearer, there is growing momentum towards a greener future. A more progressive government appears ready to meet this groundswell of change with reforms and policies that support sustainability.



Toast - sustainably brewed with surplus bread

HORIZON 5 - TECHNOLOGY

Crafting value: beer in an AI-driven world

As the era of AI begins to impact industrial processes, economies and the value of work, it will also lead to a renewed value in authenticity - both in the products and experiences we consume.

Breweries need to be ready to integrate AI, harnessing both its benefits in production and marketing. Super premium and craft brands should tread carefully however, as beer is all about human connection. This itself is a big opportunity to drive appeal in the category.



Navigating towards this horizon

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

Read now →

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

Read now →

PRODUCTION

Brewing

Optimise processes and better maintain equipment

NPD

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

Sensorials

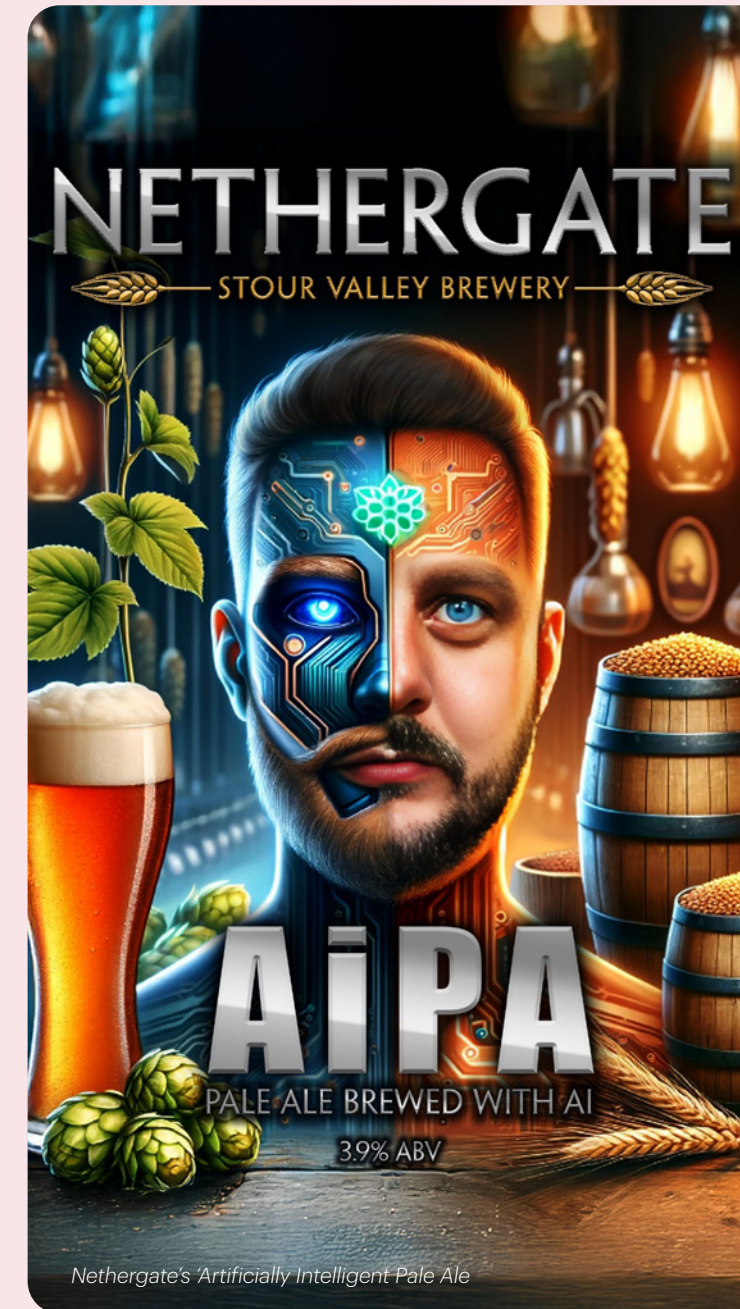
Unlock improved means of flavour profiling

Forecasting

Better analysis and prediction of consumer tastes

Read now →

'AI will optimise not revolutionise beer.'



What does this new horizon mean for beer?

In many ways, beer is well-equipped to navigate this new era of technological innovation.

The drive for efficiency in production and retail, as well as increased automation, has been part of the brewing industry for centuries. Craft brewing has long since emphasised creating value and premium quality in response to industrial automation. However, machine learning and generative AI will soon influence every aspect of the supply chain, from brewing to consumer recommendation. The technologies we choose to adopt, or not, over the next five years will be crucial to defining value along that chain.

AI is already transforming businesses across all sectors, and beer and brewing are no exceptions. Breweries are incorporating AI tools to enhance production quality and efficiency, streamline finance and accounting, as well as boost communications and marketing. By optimising processes and managing supply chains, AI will help breweries operate more profitably and sustainably.

AB InBev – producer of renowned brews including Budweiser, Stella Artois, and Corona – is building machine learning into key areas of its business, as it seeks to bring one of the world's oldest industries into the digital age. The company has invested in a raft of data-driven initiatives with the aim of improving everything from how it brews beer to how it manages its relationships with customers and markets its products to the public. It began its steps towards digital transformation several years ago by establishing what it refers to as its Beer Garage – a Silicon Valley-based hub of innovation, where it researches, develops, and tests technology-driven solutions.

In an article written by Rob Mackay for Pellicle, Cameron Brown from Turning Point Brew Co said that “AI gives us a platform to still be creative, and express our desired look in a cost effective way.”

Nonetheless, the culture of beer consumption and brewing remain human-centric and will continue to be so. While concerns about AI replacing jobs are valid, it's important to note that even for the most advanced breweries, beer remains a highly human-centred business.

The art of brewing and the pleasure of drinking beer rely heavily on our senses of taste, smell, and touch. While AI can streamline operations, it can never fully replace the importance of the first-hand, sensory experiences central to brewing, selling and enjoying beer. The human touch in brewing—craftsmanship, intuition, and creativity—is what drives so much of beer's appeal. People are drawn to good beer because of its human and tangible qualities.



AB InBev is building machine learning into key areas of its business



Turning Point - one of many breweries leaning into AI art



“It is totally fascinating to see how AI is going to integrate with the macro brewing world, but I see craft breweries, microbrewers, and nano breweries mostly staying the same. I honestly predict in 10 years they will look very similar to how they do now. Ultimately, to be a craft brewer, the essence is being original and human-centred. It’s not about computers or machines. That’s what got craft beer to where it is today.”

Chris Lewington

The emergence of craft beer a decade or more ago reflected a desire for authenticity and substance, contrasting with mass-produced alternatives. The recent revitalisation of Guinness in the mainstream shows that this desire hasn’t gone away. In a world where AI’s increasing presence forces us to reflect more on the ideas of authenticity and humanity, it’s likely that these values will be brought into sharper contrast.

Ultimately, sharing a pint with friends or enjoying a beer at the pub fosters social bonds and creates memorable experiences. Just as craft beer enthusiasts value the genuine, hands-on approach to brewing, a much broader audience are concerned about preserving what is uniquely human. This is beer’s value. AI may enhance brewing, logistics, and retail processes, but the essence of beer lies in the human connections it fosters.



AI generated image

What are the opportunities?

AI presents a tremendous opportunity for breweries of all sizes to enhance both economic efficiency and sustainability.

However, the true value of beer lies in its human-centric qualities—its craftsmanship, creativity, and social connections. Finding the sweet spot where technology and tradition meet, offers a powerful advantage for breweries that leverage AI while staying true to their artisanal roots.



OFF-TRADE

Build an immersive off-trade experience

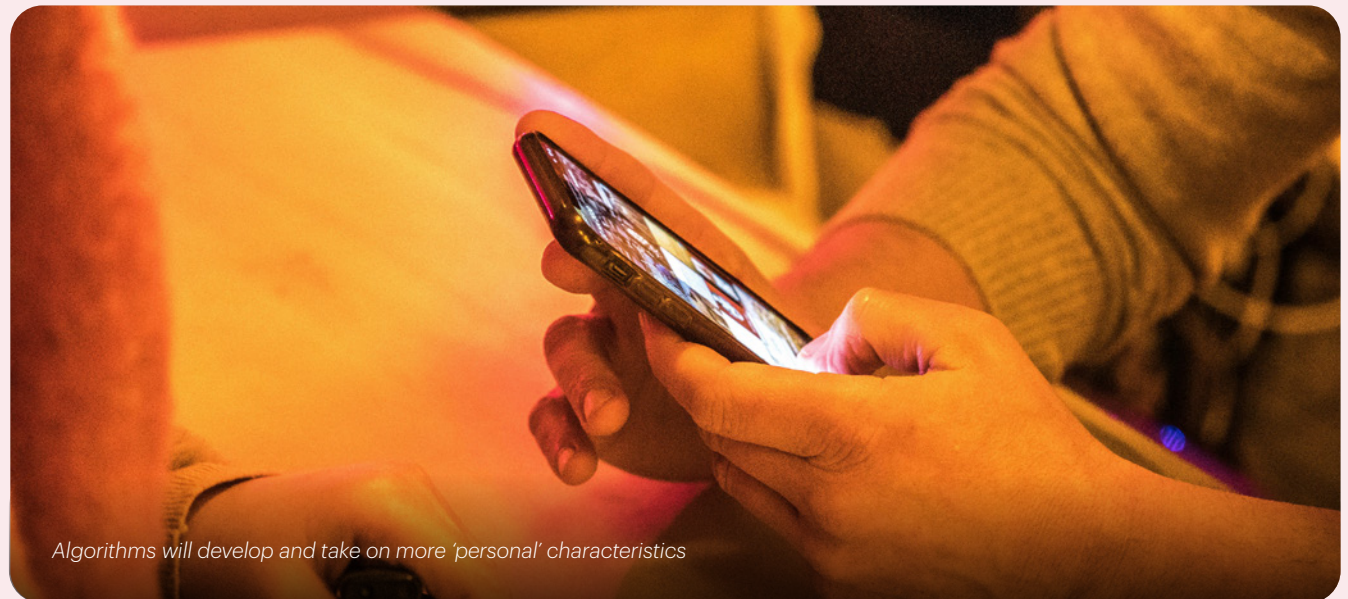
The biggest AI-led innovation will happen in the off-trade, where consumer expectations will be primarily defined by convenience. Building a more experiential, immersive in-person or digital off-trade feels very close at hand.

RECOMMENDATIONS

Create more personalised recommendations

AI's competency at recommendations and suggestions have already been well established in video content and shopping services. We'll soon see this appear more readily in the off trade for buying beer.

Furthermore, algorithms will develop and take on more 'personal' characteristics creating the digital equivalent of off-trade bar talk, with improved chat functionalities acting much like a bartenders' recommendation.



Algorithms will develop and take on more 'personal' characteristics

 RETAIL...

SAFETY

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

Self-driving cars and services like driverless Ubers are already here, making the idea of a 'DesignAlted drivers' a newer, safer option for drinkers.

These adjacent AI innovations will mean more destinations like taprooms away from transport hubs are more readily available and reachable for drinking audiences.



DesignAlted drivers' a newer, safer options for drinkers

LOGISTICS OPTIMISATION

Improve distribution and logistics

AI will help to further streamline distribution routes and logistics, improving efficiencies and reducing costs.



AI should streamline distribution and logistics

BRAND / MARKETING

MATERIAL QUALITY

Unlock more of craft's material and human value

The counter effect of AI's rise to prominence in culture will be a reevaluation of all things material and 'real'.

Craft Beer has always emphasised creativity, artisanship, materiality, and the human touch, which will be of an increasingly valuable counter balancing offer to the artifice which AI symbolises.

Categories like fashion that preserve craft and provenance in the face of AI will automatically be seen as premium and luxury; we'll see a similar premium applied to beer.

In an article written by Rob Mackay for Pellicle, Richard Wardrop from Vault City said, of using AI designs for one of their releases:

“We’ve worked with countless designers and illustrators over the years, all paid fairly, but even using AI once [...] had people questioning whether we valued art. It’s a much more contentious issue than we anticipated, and with the feedback we aren’t likely to go down this route again for new designs.”

Richard Wardrop, Vault City

MARKETING

Embrace a new underdog, us vs them opportunity in comms

The use of AI could drive another dividing point another dividing point between Macro and Craft brewers, with the former more likely to adopt it as a production method at scale. This can be an opportunity for small brands to reignite the successful narratives of earlier craft beer comms.

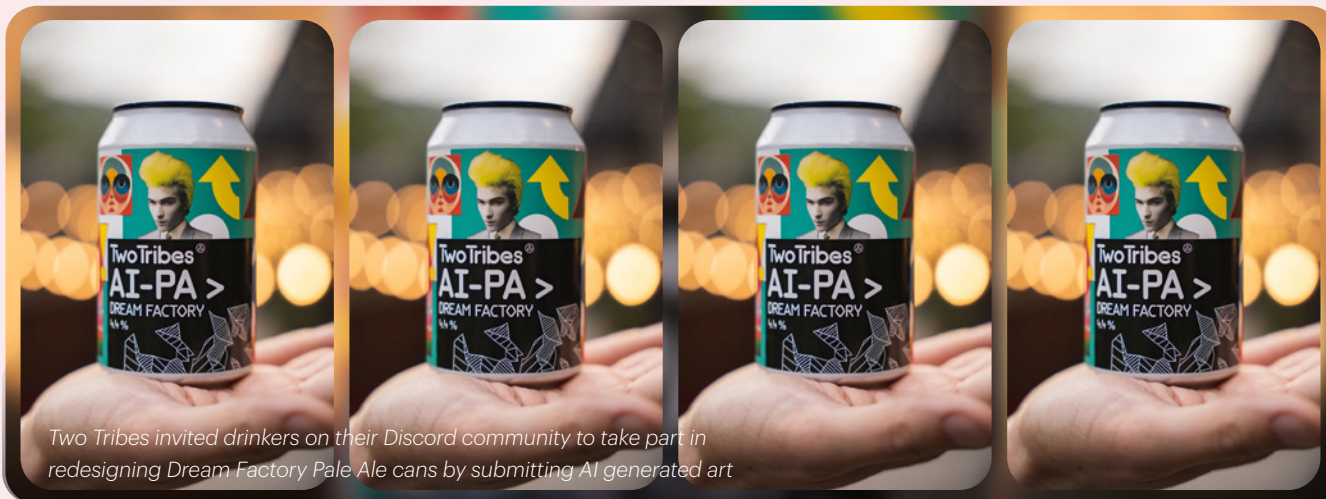
Craft brands can lean into playful, antagonistic or adversarial, us vs them narratives in relation to the Macro beer brands who may be associated with the negative associations of AI, such as its immateriality and lack of human connection.

COMMUNICATIONS

Lean into language and translation tools to grow in new markets

One practical advantage of AI will be the increased availability of tools that will reduce investment when it comes to creative development, copywriting, and translation / transcreation.

For example, translating communications to international communities and markets will mean being able to grow brand awareness and sales in like-minded communities across the globe.



Two Tribes invited drinkers on their Discord community to take part in redesigning Dream Factory Pale Ale cans by submitting AI generated art

PRODUCTION

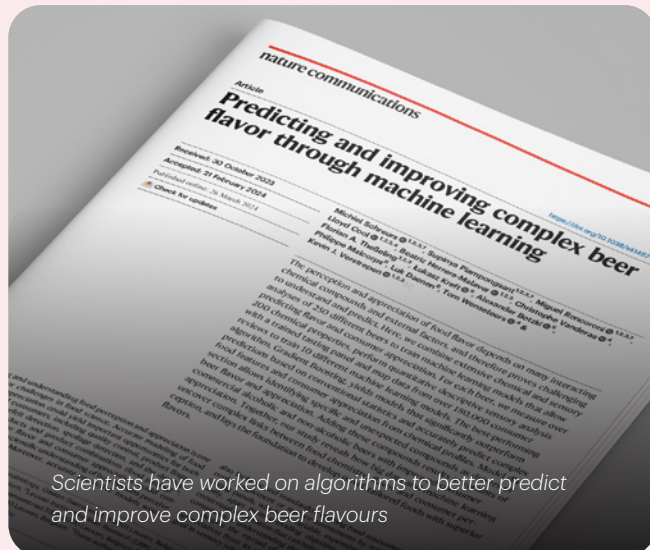
BREWING

Optimise processes and better maintain equipment

AI can analyse vast amounts of data to optimise brewing processes, which will lead to more consistent quality and efficiency.

This will still rely on a knowledgeable and well informed brewer's ability to translate insight into action.

AI will provide more detailed and regular data analysis of brewery equipment, meaning better monitoring of equipment health. These improved systems will better predict when maintenance is needed, reducing downtime, ensuring smoother operations, and ultimately saving costs in the long run.



NPD

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

A key use of generative AI will be in acting as a virtual brewing assistant to Brewmasters. AI tools can reliably and quickly enable the scaling up of recipes as well as providing some inspiration when it comes to recipe creation.

Many breweries and brands are already using AI to help with can and pack design, this will only proliferate, but must be balanced with ensuring products look 'authentic' to consumers.

St Austell recently kicked off their annual Cask Club series with a beer called 'Hand Brewed by Robots', a 4.2% American AI-PA; the recipe was created by an online generator with Assistant Brewing Manager Barnaby Skerett feeding it instructions based on ingredients he wanted to use, and the beer flavours required. Despite its computerised recipe, the beer was crafted by hand using a small batch kit.

SENSORIALS

Unlock improved means of flavour profiling

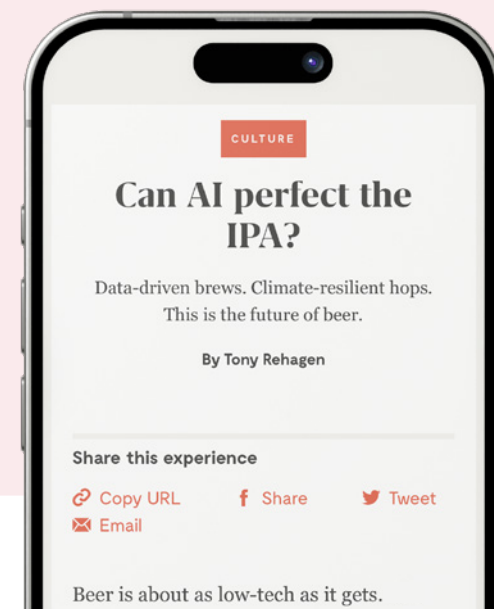
Machine learning will help analyse flavour compounds and predict how changes in ingredients or processes might affect taste, helping brewers achieve desired profiles more reliably.

FORECASTING

Better analysis and prediction of consumer tastes

AI will be able to better predict consumer demand more accurately, helping breweries manage inventory and reduce waste.

AI can identify emerging trends and preferences, helping breweries stay ahead of the market and innovate accordingly.



Can AI perfect the IPA? - expmag.com

What's driving this new horizon?

Though data analysis and automation aren't new, rapid advances in machine learning are significantly reshaping society.

Generative AI is prompting us to rethink the value we place on human labour and creativity.

Economic impact:



AI contributed
£3.7 BILLION
to the UK economy
in 2022.*

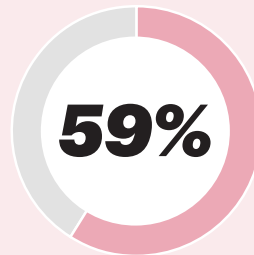
Higher salaries:



Job listings mentioning
AI offer salaries
20% HIGHER
than those that don't.*

One of AI's most profound impacts will be its ability to enhance productivity and efficiency. By streamlining operations, boosting analytical capacity, and increasing overall output, AI promises to streamline. However, this will also lead to debates about the societal value of such work.

Public concerns:



of Britains are concerned
about AI, with 'dependence
on AI and loss of human
skills' being the primary
worry.*

On a creative level, as AI becomes more integrated into daily life, the value of human-made work and authentic input is coming under scrutiny. In a world where machines can perform many tasks previously done by people, the unique qualities of human creativity, intuition, and emotional intelligence become even more vital.

This tension will also play out in daily experiences and services. The balancing act between the efficiency and personalisation offered by AI and the need for genuine human connection and community will become a defining feature of our interactions.

Ultimately, the integration of AI into society is pushing us to redefine our understanding of value, authenticity, and creativity.

Job displacement:



The government estimates that

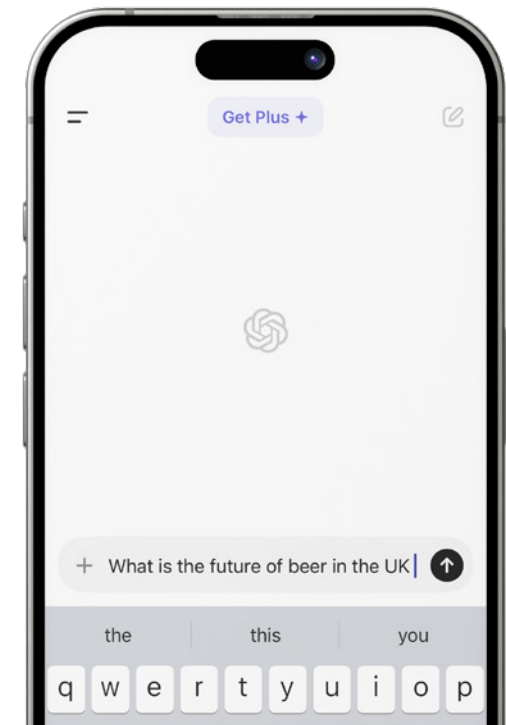
**7% OF UK JOBS COULD BE DISPLACED
IN THE NEXT FIVE YEARS,**

rising to around 18% in 10 years and
nearly 30% in 20 years—equivalent
to about 2.2 million job.*



"Using AI not only automates the process of measuring carbon emissions but also increases accuracy, scalability and repeatability. We couldn't be more excited about having this in our platform, enabling us to support our customers on a bigger scale."

George Wade



ChatGPT

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:

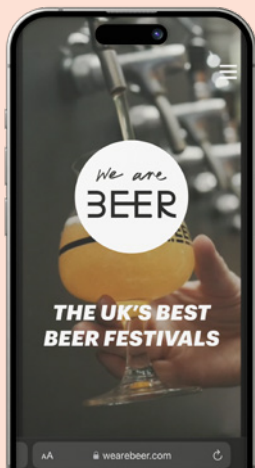
Greg@wearebeer.com

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



