



Spirits in Convenience

Five trends from 13,000+ independent stores and what they mean for your 2027 plan

13,000+ independent convenience stores

Barcode-level EPOS data, January 2025 to July 2026

For category, brand, commercial and insight teams selling spirits through UK convenience

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Shining a light on spirits in independent convenience

Retail Spotlight collects EPOS data from more than 13,000 independent convenience stores, around 27% of the UK mainland channel. Every number in this report is a barcode scanned at a till in one of those shops. None of it is modelled, sampled or extrapolated from grocery.

That matters because independent convenience does not behave like the rest of the off-trade, and it does not behave consistently with itself either.

A shop next to a station sells differently from one on a housing estate, and both sell differently from one near a school. The granularity of our data allows us to shine a light on trends in convenience that many spirits brands are completely unaware of.

This report covers January 2025 to July 2026 across the 14 spirit product types that make up more than 95% of category value.

It is written for the category, brand, commercial and insight teams now building their 2027 convenience plans, and particularly for anyone making ranging, pack and pricing decisions for this channel using grocery data or feedback from the field.



Five trends came out of the analysis:

- 01 Value is holding up better than unit sales.** Across most product types, unit sales grew more slowly than value or fell faster.
 - 02 50ml is growing, but not everywhere.** Miniatures gained 2.9 percentage points of unit share across spirits, yet lost share in five of the twelve product types with validated pack-size data.
 - 03 Flavoured variants are in decline.** Flavoured vodka and flavoured gin both fell by double digits over the period while unflavoured vodka was flat.
 - 04 The fastest-growing category is not selling everywhere.** Whiskey liqueur recorded a sale in 63.9% of alcohol-selling stores, and Fireball leads the category in all eleven regions.
 - 05 Two challenger stories coincide with pack-mix change.** Wha Gwan grew as 200ml expanded in cream liqueur, while Jameson growth came from units outside 700ml.
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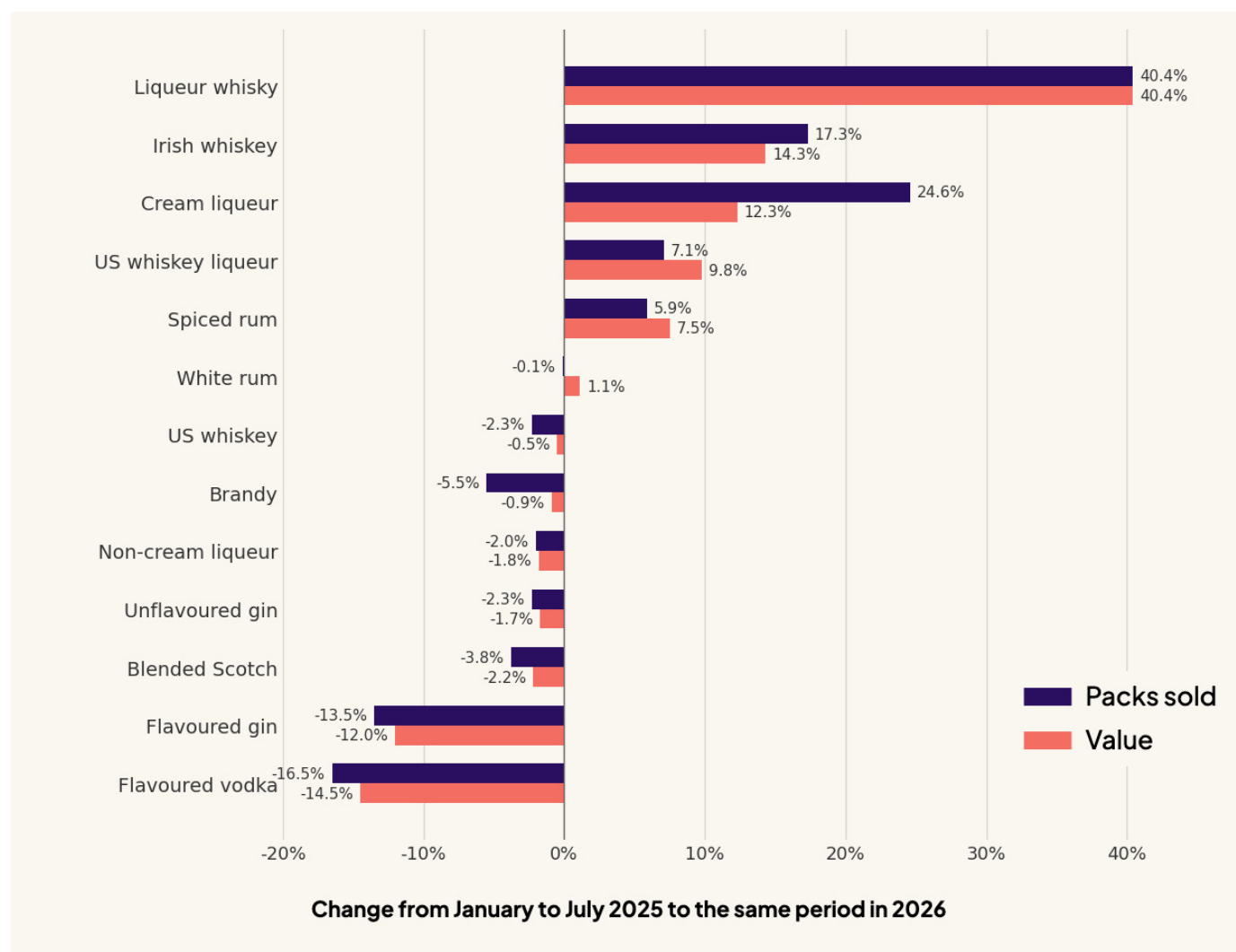


01

Value edged up while unit sales fell

Value rose 0.4%. Units sold fell 0.4%. Most product types followed the same trend.

Value edged up while unit sales fell



Percentage change from January–July 2025 to January–July 2026.

The topline numbers appear fairly static – value grew 0.4% and units sold fell 0.4%. However, inside individual categories there is far more fluctuation than the headline numbers suggest.

Across most product types, sales value held up better than unit sales:

- Brandy lost 0.9% of its value and 5.5% of its units.
- US whiskey lost 0.5% of its value and 2.3% of its units.
- Blended Scotch lost 2.2% of its value and 3.8% of its units.

In each case, unit sales fell more sharply than sales value. This means the average value generated per unit increased, most likely due to price increases, a change in the mix of units sold or both.

Interestingly, two product types moved the other way:

- Irish whiskey grew 14.3% in value and 17.3% in units.
- Cream liqueur grew 12.3% in value and 24.6% in units.

Average sales value per unit fell as smaller bottles took a larger share of sales. Trends 2 and 5 examine this pack shift in greater detail.

The same bottles cost more

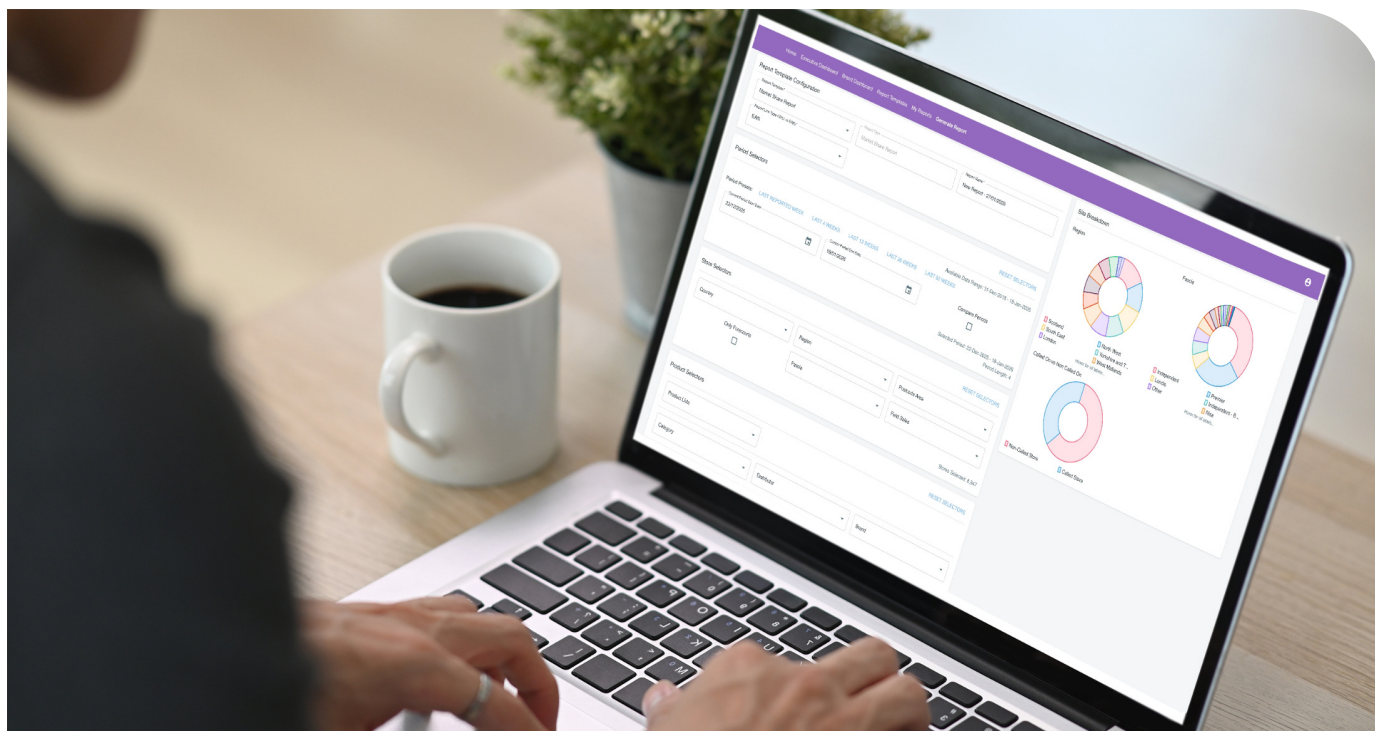
Established products keep returning to shelf with higher price marks. For example, Jules Clairon brandy has carried five separate price-marked barcodes since 2020, running from £15.49 to £18.99. Same 70cl bottle, same 36% ABV throughout.

Price marked pack progression for unchanged 70cl products

Product (unchanged 70cl)	Earliest price mark	Latest price mark	Change
Jules Clairon Brandy 36%	£15.49 (Mar 2020)	£18.99 (Apr 2026)	+22.6%
Whyte & Mackay 40%	£16.49 (May 2022)	£19.99 (May 2026)	+21.2%
Captain Morgan Spiced Gold 35%	£16.29 (Oct 2022)	£18.19 (Jul 2026)	+11.7%

Price-marked barcodes tracked across the Retail Spotlight estate by first sale date.

These examples do not show shoppers trading up to a more premium product. They show new price-marked barcodes appearing for the same 70cl products at the same ABV, but at higher cash prices.



What this means for your 2027 plan

Benchmark your brand against its product type, not total spirits. Irish whiskey grew 14.3% in value; flavoured vodka fell 14.5%. Those are very different definitions of market performance.

Read value and unit sales together. Retail Spotlight can then show whether growth depends on reaching more retailers or increasing sales in the stores where the brand already records transactions.



02

Small formats are reshaping how spirits sell in convenience

50ml went from 16.9% to 19.7% of units sold, but the growth is not spread evenly.

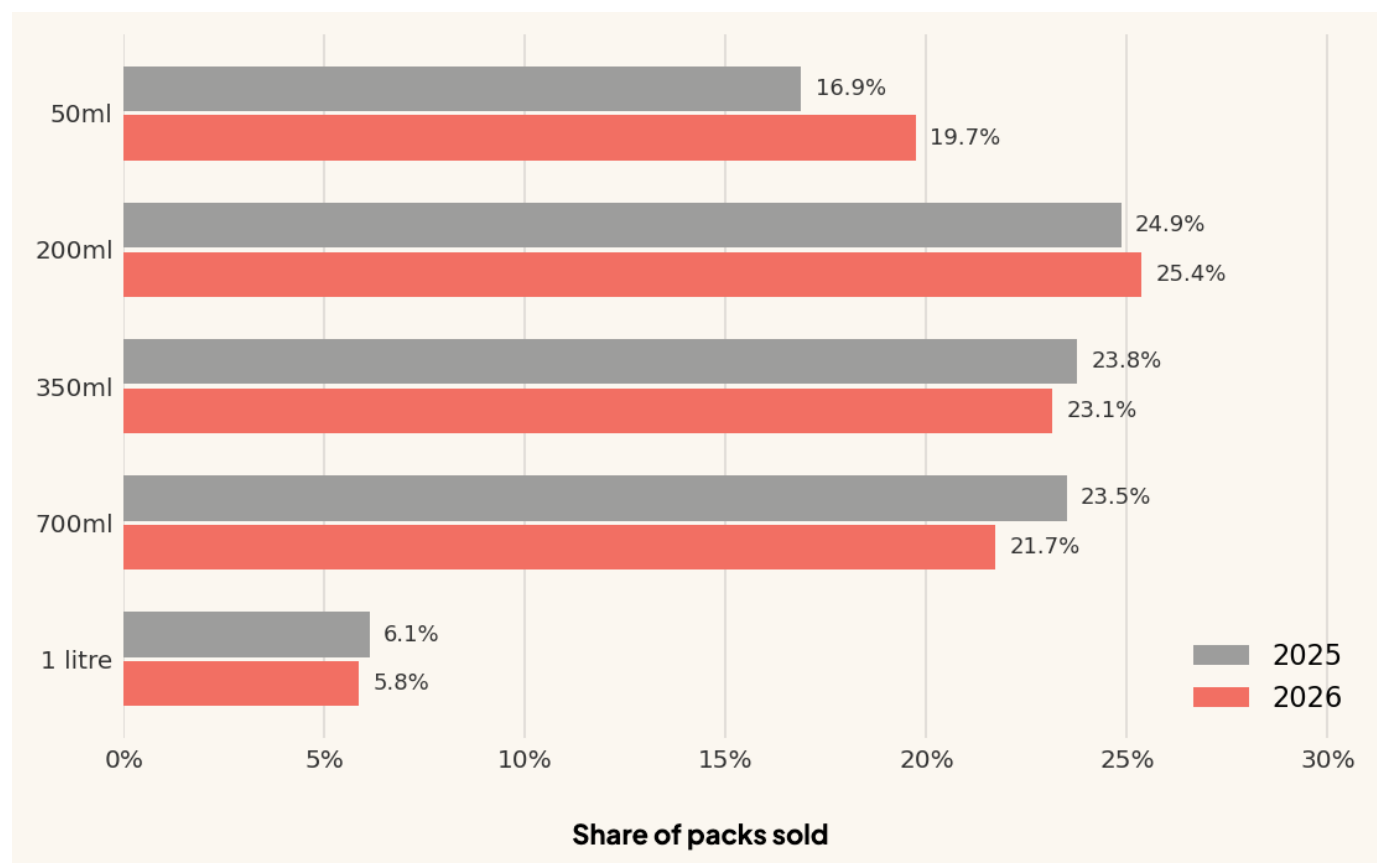
Small formats are reshaping how spirits sell in convenience

Smaller bottles are taking a bigger share of spirits sales in convenience, giving shoppers a lower cash price at the till – even when the liquid costs more per litre.

Across all spirits, 50ml bottles increased from 16.9% to 19.7% of units sold, a gain of 2.9 percentage points.

Meanwhile, the share held by 700ml bottles fell from 23.5% to 21.7%, while 200ml bottles edged up from 24.9% to 25.4%.

Spirits unit share by bottle size



Share of units sold by pack size, January–July 2025 versus January–July 2026.

Miniatures are no longer confined to whisky. The ten biggest brands selling in 5cl or smaller cover vodka, whiskey liqueur, bourbon, Scotch, white rum, brandy and gin.

Leading brands in bottles of 5cl or less

Top 10 brands selling in 5cl or less	Share of 5cl sales
Smirnoff	19.13%
Fireball	18.00%
Jack Daniel's	11.98%
The Famous Grouse	8.99%
Chekov	6.51%
Wray & Nephew	4.07%
Cool Shot	3.02%
Glens	2.85%
Courvoisier	2.50%
Gordon's	2.33%

Share of spirits sold in bottles of 5cl or smaller, January–July 2026.

The shift is not happening in every category

Split the 50ml figure by product type and it rises in seven categories and falls in five.

50ml unit share by product type

50ml share of units	2025	2026	Change
Unflavoured vodka	12.3%	15.2%	+2.9pp
Non-cream liqueur	4.0%	5.6%	+1.7pp
Blended Scotch	13.5%	15.1%	+1.6pp
Unflavoured gin	7.1%	8.0%	+0.9pp
US whiskey	31.7%	32.5%	+0.8pp
Spiced rum	3.7%	4.3%	+0.6pp
Brandy	15.8%	16.0%	+0.2pp
Flavoured gin	19.4%	19.3%	-0.1pp
Irish whiskey	11.1%	11.0%	-0.1pp
White rum	24.7%	24.5%	-0.2pp
Flavoured vodka	22.4%	21.3%	-1.2pp
Cream liqueur	27.7%	22.0%	-5.7pp

Share of units sold at 50ml within each product type, January–July 2025 versus January–July 2026.

The growth is concentrated in categories that had very few miniatures to begin with. The categories where miniatures were already well established are flat or going backwards, including white rum at 24.7%, flavoured vodka at 22.4% and cream liqueur at 27.7%.

Cream liqueur has a specific reason for its fall. Its 50ml share dropped because 200ml took the space, again, Trend 5 will cover this in detail.

Smaller bottles cost more per litre

A smaller bottle is easier on the wallet at the till, but considerably less generous by the litre. The whisky price-per-litre figures show it clearly.

Price per litre for the ten leading whisky brands

Price per litre, top 10 whisky brands	2026
Fireball	£40.64
Jack Daniel's	£38.67
Jameson	£36.65
Southern Comfort	£33.03
The Famous Grouse	£32.19
Bells	£29.86
The Jacobite	£28.96
High Commissioner	£28.09
Whyte & Mackay	£27.99
Grants	£26.03

Average price per litre, most recent month.



£40.64

Fireball's price per litre, the highest of the top ten whisky brands

Fireball is the most expensive whisky per litre of the top ten at £40.64, ahead of Jack Daniel's at £38.67. Fireball sells almost entirely in 5cl, so that figure comes from the pack size rather than from the product being more premium.

Across those ten brands, price per litre rose 75p on average over the year. Jameson rose 14p and The Famous Grouse rose £1.52, so the increase is nowhere near uniform.



What this means for your 2027 plan

A convenience range built around 700ml is increasingly out of step with total spirits sales: the 70cl bottle lost nearly two percentage points of unit share in a year.

But smaller is not the answer in every product type, so use the relevant pack-size pattern rather than the channel average.

When you add a smaller pack, compare total brand sales and the larger pack before and after launch. Store-level barcode data shows whether the new size adds sales or mainly replaces sales from another pack.



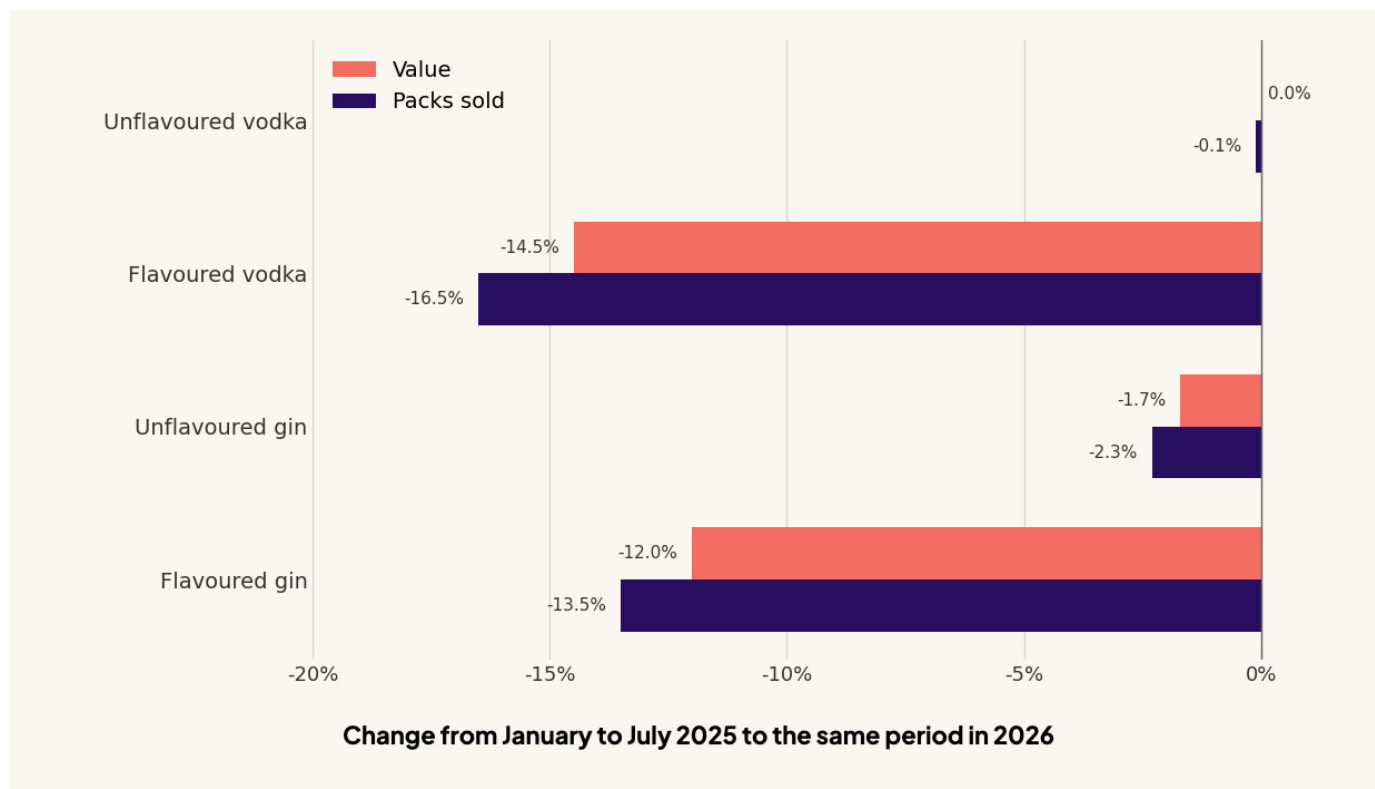
03

Flavoured spirits are in freefall

Flavoured vodka down 14.5%, flavoured gin down 12.0%, while unflavoured held steady.

Flavoured spirits are in freefall

Flavoured and unflavoured vodka and gin performance



Percentage change from January–July 2025 to January–July 2026.

The boom in flavoured spirits appears to have lost momentum in independent convenience. While the core vodka and gin categories remained relatively stable, their flavoured variants experienced much sharper declines.

Flavoured vodka lost 14.5% of its value and 16.5% of its unit sales, while flavoured gin fell by 12.0% in value and 13.5% in units.

Over the same period, unflavoured vodka was broadly flat and unflavoured gin declined by just 1.7% in value.

Flavoured vodka is also moving away from smaller bottles

Flavoured vodka moved further towards 700ml.

Its 700ml share rose from 74.4% to 75.5% of units sold, while its 50ml share fell from 22.4% to 21.3%. White rum also recorded a small increase in 700ml share, but the shift was much smaller.

It also has one of the lowest price-marked shares in spirits, at 24.1% of value against 80.3% for unflavoured vodka. The same spirit, on the same fixture, sold on very different terms.

The next question Retail Spotlight can answer

The immediate test is whether flavoured spirits lost sales where ready-to-drink products or mixers gained them. Retail Spotlight records those transactions in the same stores and periods, allowing brands to compare the movements by store type and location.

That comparison will not prove why an individual shopper changed their purchase, but it will show where the substitution hypothesis fits the sales pattern and where another explanation is needed.

What this means for your 2027 plan

Do not assume another flavour will reverse the decline. First compare flavoured spirit sales with ready-to-drink and mixer sales in the same stores and periods.

Then separate stores that stopped recording sales from stores where flavoured lines remained active but sold more slowly. Retail Spotlight can identify both groups for different commercial action.



04

Fireball turned a niche into a category

The fastest-growing product type recorded sales in 63.9% of alcohol-selling stores.

Fireball turned a niche into a category

Whiskey liqueur remains a small part of the spirits fixture, but it is growing considerably faster than every other product type in the category. That growth is overwhelmingly driven by one brand: Fireball.

Whiskey liqueur grew by 40.4% in both value and unit sales, despite accounting for only 1.54% of total spirits value nationally. Fireball represents 96.3% of whiskey liqueur sales, while its distributor, Sazerac, accounts for 97.2% of the category's value.



40.4%

Whiskey liqueur growth in value and unit sales, the fastest of any spirits product type

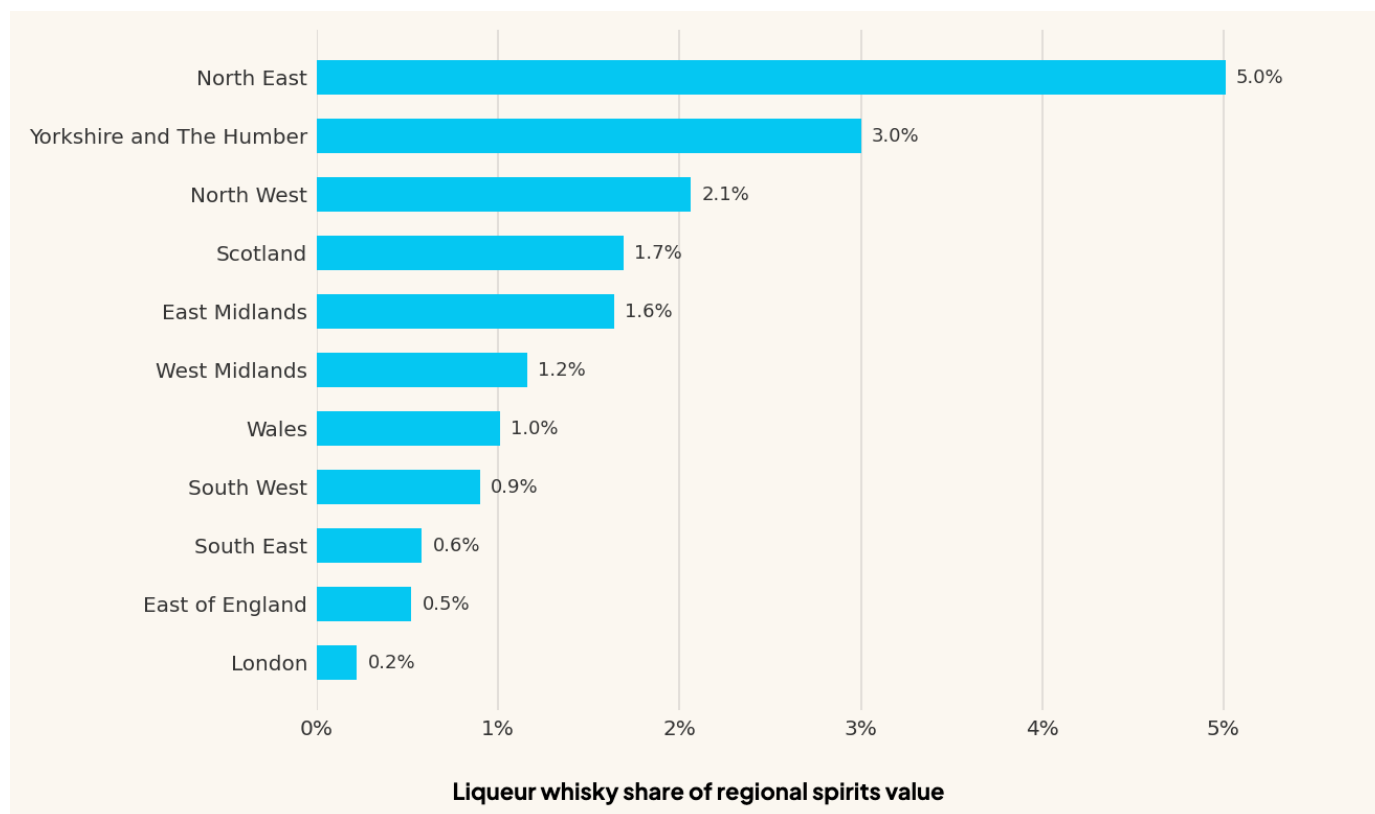
Fireball is also the second-largest brand in spirits bottles of 5cl or smaller, behind only Smirnoff. Its performance therefore connects closely with the shift towards smaller formats explored in Trend 2.

Whiskey liqueur recorded sales in 63.9% of stores

The whiskey liqueur product type recorded a sale in 63.9% of alcohol-selling stores over the period. Unflavoured vodka recorded a sale in 91.8%. This leaves well over 4,000 stores in the estate with no recorded whiskey liqueur sale during the period.

Regional sales vary sharply

Whiskey liqueur share of spirits value by region



Whiskey liqueur as a share of regional spirits value, January–July 2026.

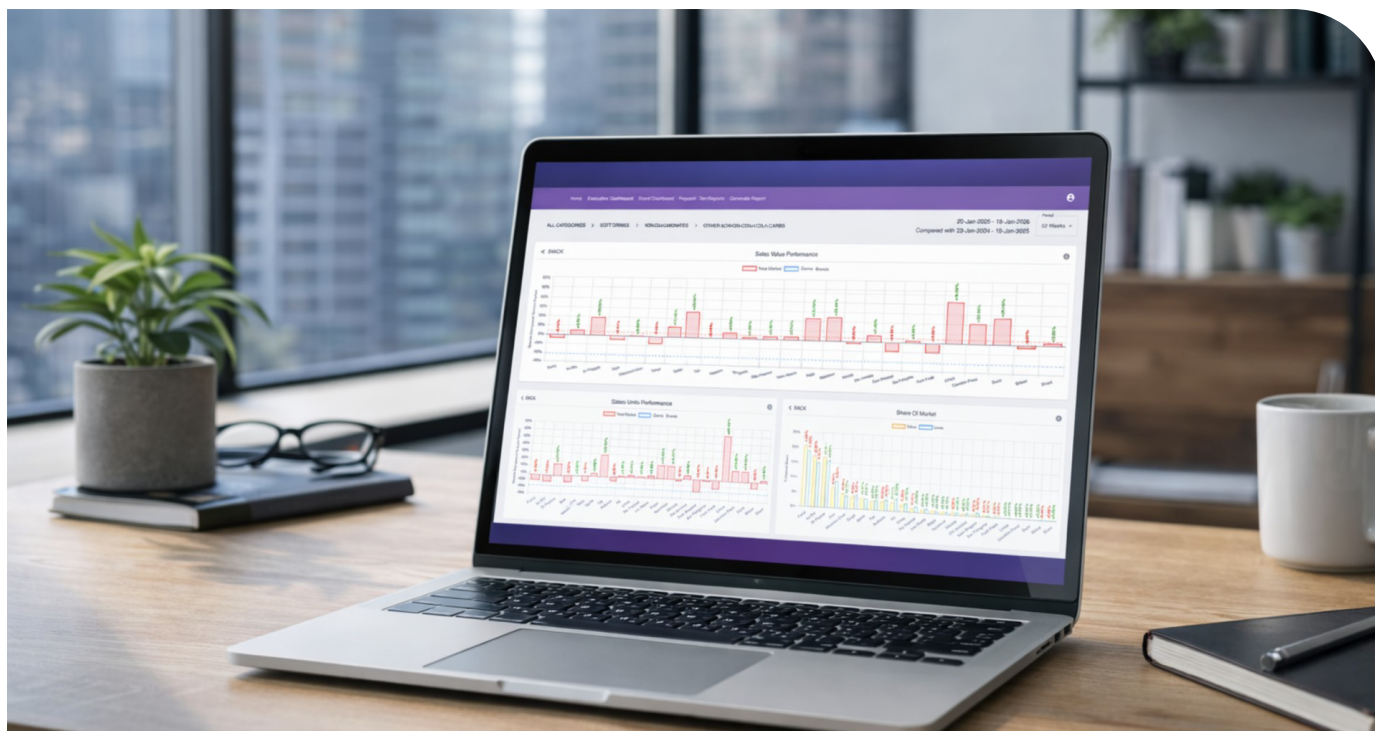
Whiskey liqueur is 5.01% of spirits value in the North East and 0.22% in London, a twenty-three-fold difference.

Fireball leads the whiskey liqueur category in every region, but the category accounts for a much larger share of spirits sales in some regions than in others.

Retail Spotlight can turn that regional gap into a retailer target list by comparing the number of stores recording whiskey liqueur sales with units sold per selling store. That separates areas with few recorded sellers from areas where the category records sales widely but moves slowly.

63.9%

Share of alcohol-selling stores that recorded a whiskey liqueur sale, against 91.8% for unflavoured vodka



What this means for your 2027 plan

Whiskey liqueur is only 1.54% of spirits value, so the case is for targeted expansion rather than a blanket national rollout. Start with stores where whiskey liqueur or adjacent miniature spirits already sell strongly and test whether a competing proposition can win a share of the category.

Retail Spotlight can rank stores by category and Fireball sales, compare units per selling store, and identify retailers where the category is strong but competition is limited. That gives a challenger a practical contact list and a benchmark for measuring the result.



05

New challengers are winning on format, not flavour

Wha Gwan and Jameson grew as their pack mixes shifted towards smaller bottles.

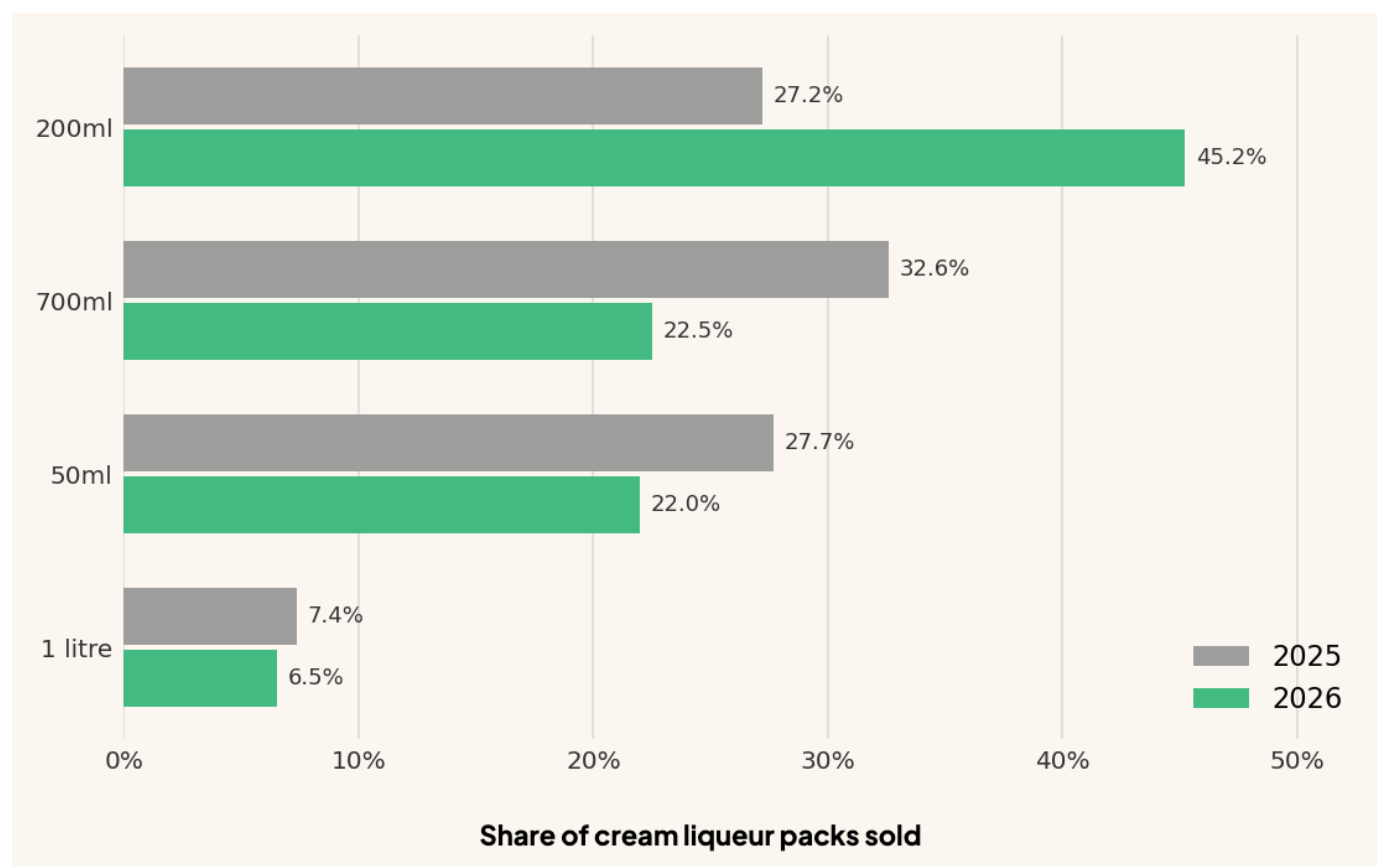
Challenger growth coincided with changes in pack mix

Wha Gwan and Jameson operate in very different parts of the spirits market, but their recent performance reveals a similar pattern. Both brands grew strongly as a greater share of their sales came from smaller bottles rather than the traditional 700ml format.

The data does not prove that the change in pack mix caused their growth. It does, however, show that both brands gained momentum while offering formats that better reflect how spirits are increasingly being bought in independent convenience.

Wha Gwan and the 200ml cream liqueur

Cream liqueur unit share by bottle size



Share of cream liqueur units sold by pack size, January–July 2025 versus January–July 2026.

Cream liqueur grew 12.3% in value and 24.6% in units.

The 200ml bottle went from 27.2% to 45.2% of units sold, taking share from both the 700ml bottle and the 5cl miniature.

Wha Gwan grew 241.7% in value over the same months, and its distributor Bevstar went from 7.1% to 21.6% of cream liqueur value. Its growth coincided with the move towards 200ml, the pack size taking the most share in the product type.

Its position varies a lot by region, which is worth knowing if you compete in the category.

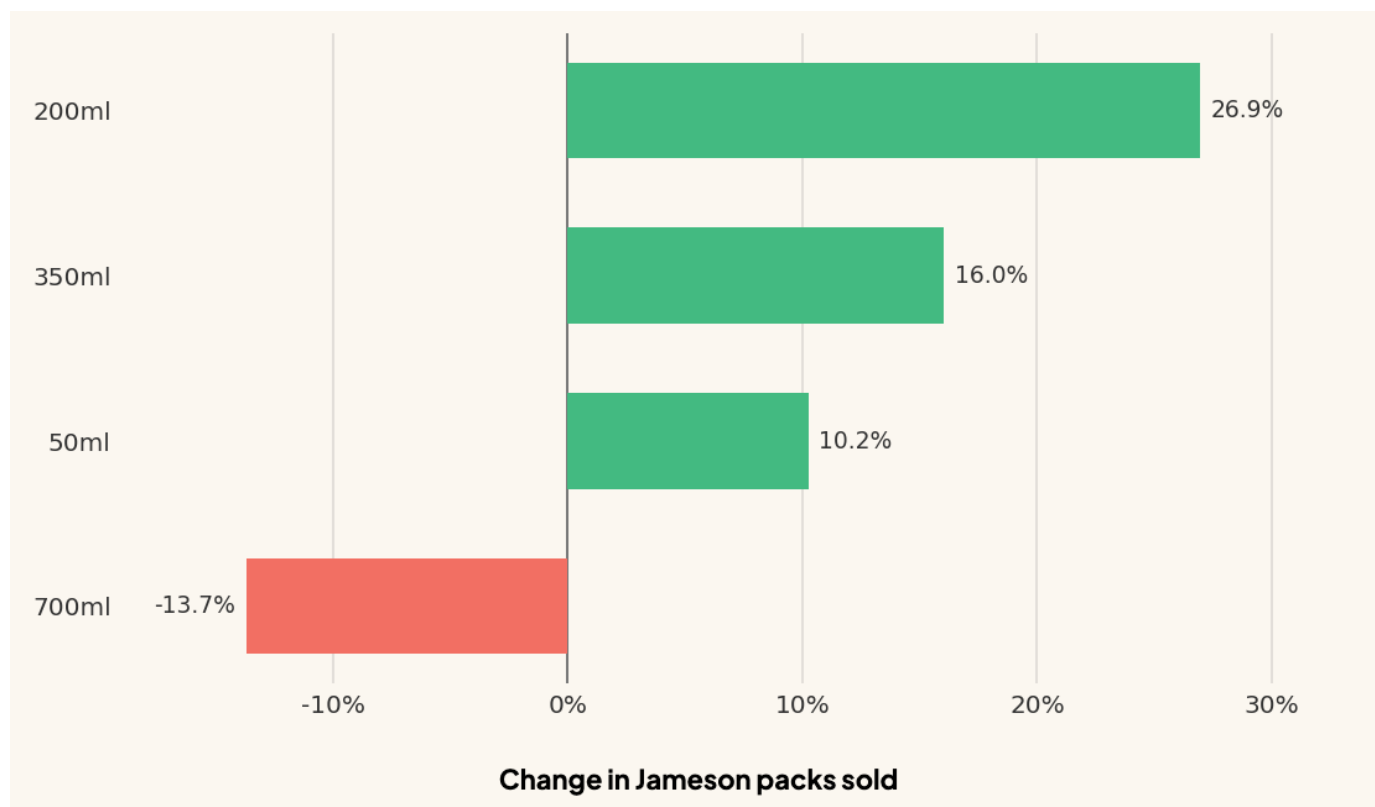
Wha Gwan share of cream liqueur value by region

Wha Gwan share of cream liqueur	Share
Scotland	38.83%
London	29.77%
East of England	27.64%
East Midlands	27.36%
South East	23.21%
South West	20.03%
West Midlands	18.54%
Wales	18.12%
Yorkshire and The Humber	13.78%
North East	12.29%
North West	7.45%

Wha Gwan share of cream liqueur value by region, January–July 2026.

Jameson and the move out of 700ml

Jameson unit sales by bottle size



Jameson units sold by pack size, January–July 2025 versus January–July 2026.

Irish whiskey grew by 14.3% in value and 17.3% in unit sales. With Jameson accounting for 94.5% of the category, its performance is central to that growth.

Price appears to explain relatively little of the increase. Jameson's average price per litre rose by just 14p, compared with an average increase of 75p across the ten leading whisky brands. Its growth was instead concentrated in 50ml, 200ml and 350ml bottles, while sales of its 700ml bottle declined.

There may also be room to extend the category's reach. Irish whiskey recorded sales in 78.8% of alcohol-selling stores, compared with 91.8% for unflavoured vodka.

Retail Spotlight can identify stores where whisky already performs well but Irish whiskey has little or no recorded sales, giving Jameson and competing brands a focused list of retailers to approach.

241.7%

Wha Gwan value growth, as 200ml went from 27.2% to 45.2% of cream liqueur units



What this means for your 2027 plan

Pack mix is a practical test for 2027, but these examples show association rather than proof that size alone caused growth. Use the product-type pattern to choose the pack, then test it in stores where comparable brands or sizes already sell well.

Measure total brand sales alongside each pack. That shows whether the new size adds sales or mainly replaces an existing bottle.

What these trends mean for spirits brands

The data points to pack format and cash price as two of the clearest forces shaping spirits sales in independent convenience.

Fireball's leadership is closely tied to 5cl. Wha Gwan's growth coincided with the rise of 200ml in cream liqueur. Jameson grew in 50ml, 200ml and 350ml while its 700ml bottles declined. Flavoured vodka, the weakest performer in the report, moved further towards 700ml as its value and unit sales fell.

These differences become visible when category sales are broken down by barcode, pack size, price mark, region and store.

Finding the retailers with the greatest sales potential

The national figures provide the benchmark. The commercial opportunity sits in the stores where the category or a competitor performs well but the brand under-indexes.

Retail Spotlight can identify those opportunities in five steps:

01

Rank stores by total product-type and competitor sales.

02

Compare the brand's recorded sales with similar stores and locations.

03

Identify retailers where the product type performs but the brand under-indexes.

04

Prioritise those retailers for direct contact and match the pitch to the relevant pack, price mark or competitor gap.

05

Measure whether the new listing, pack or price change adds incremental sales after activation.

The result is a prioritised list of retailers for direct contact, with the category evidence behind each opportunity and a way to measure what happens after a listing, pack or price change.

Keen to find out more?

Reach out to us and we can help you benchmark your range by region, pack size, price mark, stores recording sales, units per selling store and competitor performance across more than 13,000 independent retailers.

We will show you which retailers to contact, why each one represents an opportunity and how to measure the result.

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Methodology

Retail Spotlight tracks EPOS data from 13,000+ independent convenience stores across the UK mainland, around 27% of the channel. All data in this report comes from Retail Spotlight.

The main comparison covers January to July 2025 against January to July 2026. Units throughout means individual bottles sold, not litres. Where pack size is changing, those two measures move differently, which is the point of several sections here.

Price-marked figures show the price-marked share of category value. Brand share and distributor share cover the full January 2025 to July 2026 period unless stated otherwise.

Regional figures show the composition of spirits value within a region. They show how important a product type is locally. They do not on their own measure whether a particular brand was available. Store-level sales incidence and units per selling store can be analysed separately.

Sales incidence figures show the percentage of alcohol-selling stores in the estate that recorded a sale of the product type during the period. They do not prove continuous stocking or availability.

Fourteen product types account for more than 95% of spirits value, 97% of units sold and 80% of all spirits barcodes sold across the estate in the period covered.