

wine

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Wine in the UK on-trade sector

Market report

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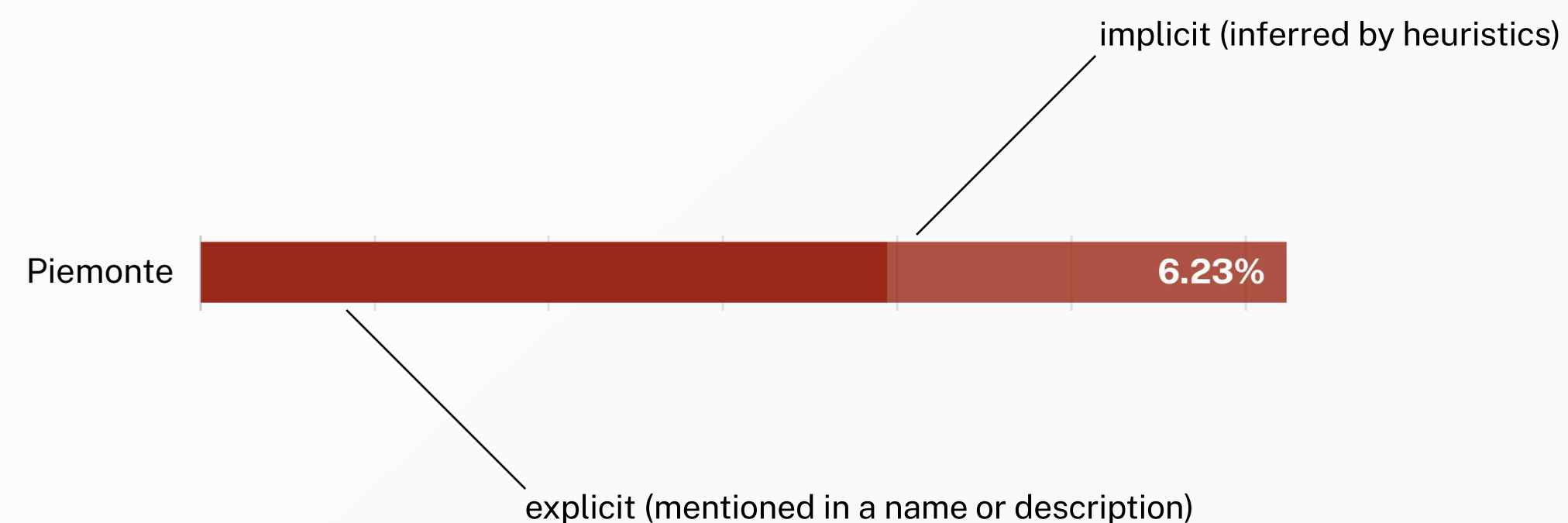
Introduction

This report reflects the state of the UK on-trade wine market at the end of 2025. From the most prestigious fine dining restaurants of Mayfair to natural wine bars, from private members' clubs to village pubs, we tried to capture the whole landscape of the nation's wine drinking in public. A placement on a wine list is something much bigger than a bottle on a supermarket shelf. It is almost never random. It is a conscious choice that reflects an owner's or sommelier's perception of their venue and its clients, of what is interesting and what is attractive, of what is trendy and what is memorable.

If there is one conclusion to draw from this report, it is that the British wine market is open and welcoming to all interesting wines that don't pretend to be what they are not, regardless of origin, grape variety, or price. It is meritocratic. What is inside the bottle is more important than your marketing budget. Integrity is what is valued. However, still wines and sparkling wines are selected according to very different patterns.

The information contained in wine lists was the primary source of data; sometimes they were incomplete, and sometimes the sum of mutually exclusive categories that should together form the whole subset is slightly less than 100%. The exact methodology of data collection and processing is published at [WineMarkets.co](https://winemarkets.co); the resulting data has proven to be remarkably accurate.

Today, **WineMarkets.co** tracks more than 37,000 wine brands, about 2,100 regions and appellations down to the village level, and more than 800 grape varieties. All these properties, or tags, are divided into *explicit* and *implicit*. *Explicit* are the properties that were stated directly in wine lists. *Implicit* tags are assigned algorithmically through a set of rules. On the report's bar charts, implicit tags are shown with semi-transparent fill.



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General overview

Like in the US, around 20% of wine in the UK by volume is drunk in restaurants, bars and pubs. The British might be accustomed to thinking that the markup in restaurants is very high, but it is lower than in the US. The median price for the least expensive wines is usually 2.5 times higher in on-trade than in off-trade in Britain (in the US it is 3.5 times higher); for prestige, high-priced wines it is around 1.5 times higher (compared with 2 times in the US; see Appendix 1). On the other hand, the median on-trade prices across various categories are substantially higher in Britain than in continental Europe.

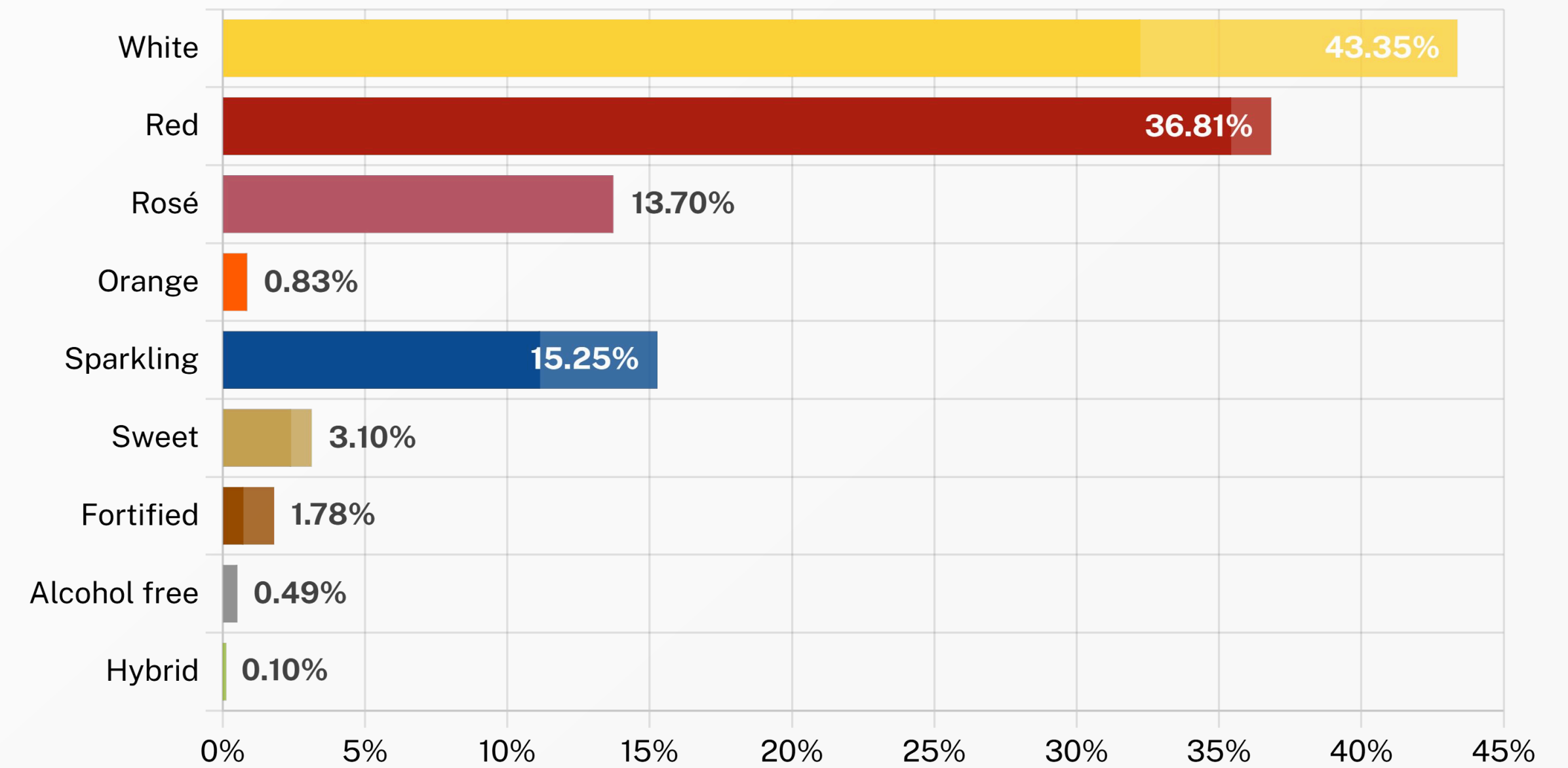
The variance in markup across the restaurant scene in Britain is significantly higher than in the US: there are plenty of wine-oriented restaurants where the prices are only marginally higher than in wine shops. The opposite category of fine dining venues also exists.

There are noticeably more white wine than red wine placements, both by the bottle and by the glass. White wines are popular, and this is equally true for top Burgundies in restaurants in Mayfair and simple Pinot Grigios in local pubs. In contrast to Americans, British men don't seem to think that drinking white or rosé wine threatens their masculinity.

Rosé wines are popular in the UK, with the share of placements 2.5 times higher than in the US. The average British restaurant carries six rosé wines, while the American one carries three. The shares of sweet and fortified wines are as small as elsewhere in the world with the exception of Portugal, even though Britain historically was the main market for Ports and Sherries.

Peculiar is the relatively high share of non-alcoholic wines (although still small in absolute numbers), which is 8 times higher than in the US and 10 times higher than in France, though the same as in Germany.

Miscellaneous categories (% of all placements)



Median on-trade price

 **£7.95**  **£38**

Placements in the United Kingdom, BTG and BTB, placements=347,239, wine lists=9,077, establishments=7,683

Version: v1.1beta/2026 db Nov 2025

Grape varieties

Wines made from Chardonnay and Sauvignon Blanc are the most popular in wine lists having an equal share of placements, although the numbers also include many non-varietally labeled titles from Burgundy and the Loire. Among varietally labeled wines, Pinot Grigio is the most popular, closely followed by Sauvignon Blanc. Many local pubs have Pinot Grigio and Sauvignon Blanc by the glass.

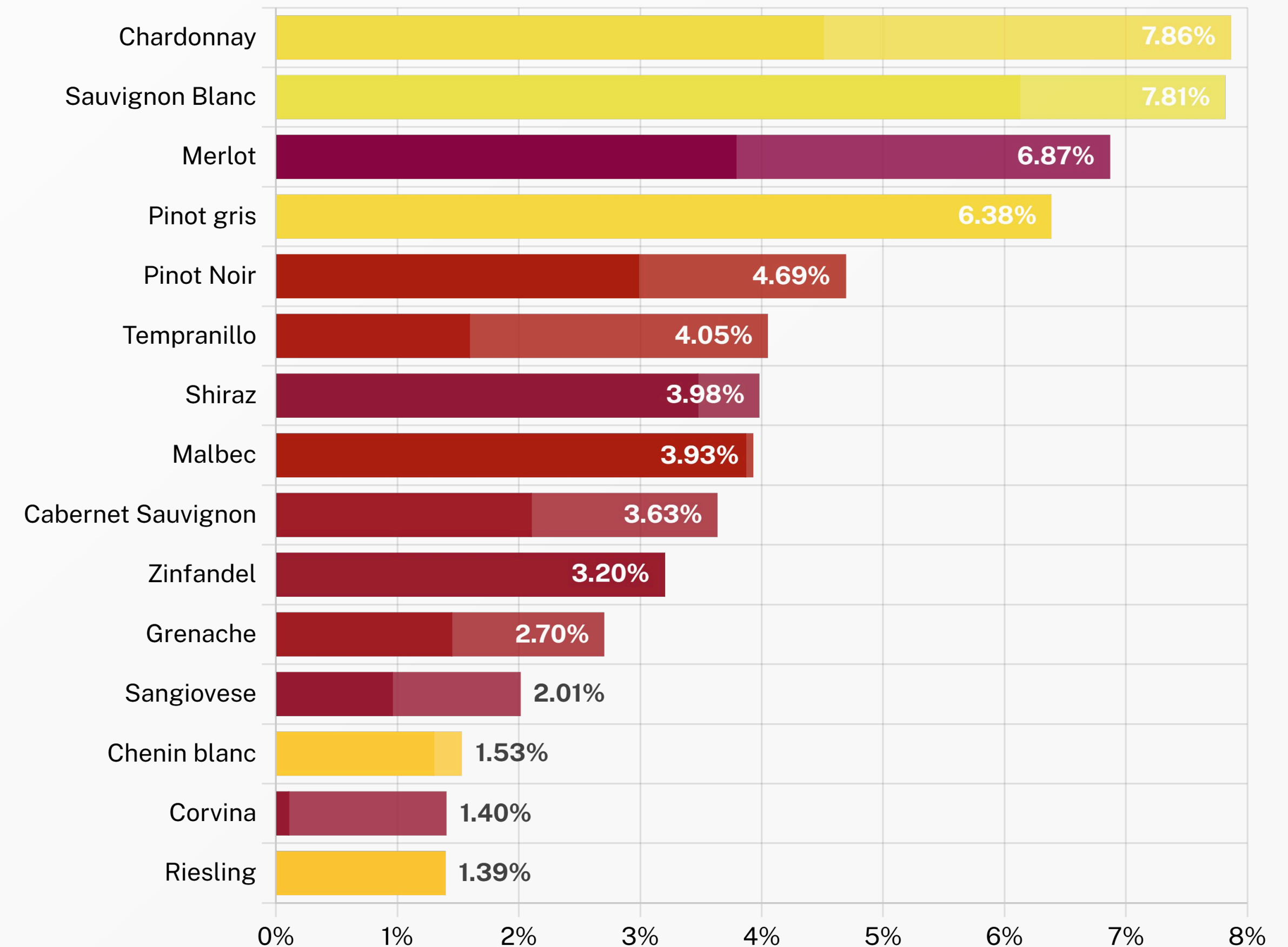
Chenin Blanc has more placements than Riesling, not least because South African wines are four times more popular than German wines. Riesling is surprisingly unpopular in today's Britain, with only 1.4% of placements, which can be viewed as a low base for future growth. Picpoul has 1% in the UK against only 0.05% in the US.

Among reds, Merlot is leading over Pinot Noir, as the British clearly didn't take the movie *Sideways* too seriously. Cabernet Sauvignon, which is synonymous with red wine for Americans and by far the most popular grape variety in the US, is in 9th place, trailing Tempranillo, Shiraz and Malbec in total placements, both varietally and non-varietally labelled.

The Pareto distributions for both grape varieties and appellations are much more gradual in the UK than in the US. The British don't tend to draw conclusions on quality or prestige based on few known words. Unlike in the US, a grape variety in the UK is usually neither a positive nor a negative selling point.

Grape varieties in on-trade in the UK

(% of all placements, still wines only)



Placements in the United Kingdom, BTG and BTB, excluding: Sparkling (explicit and implicit), placements=294,287, wine lists=8,897, establishments=7,602

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Countries of origin

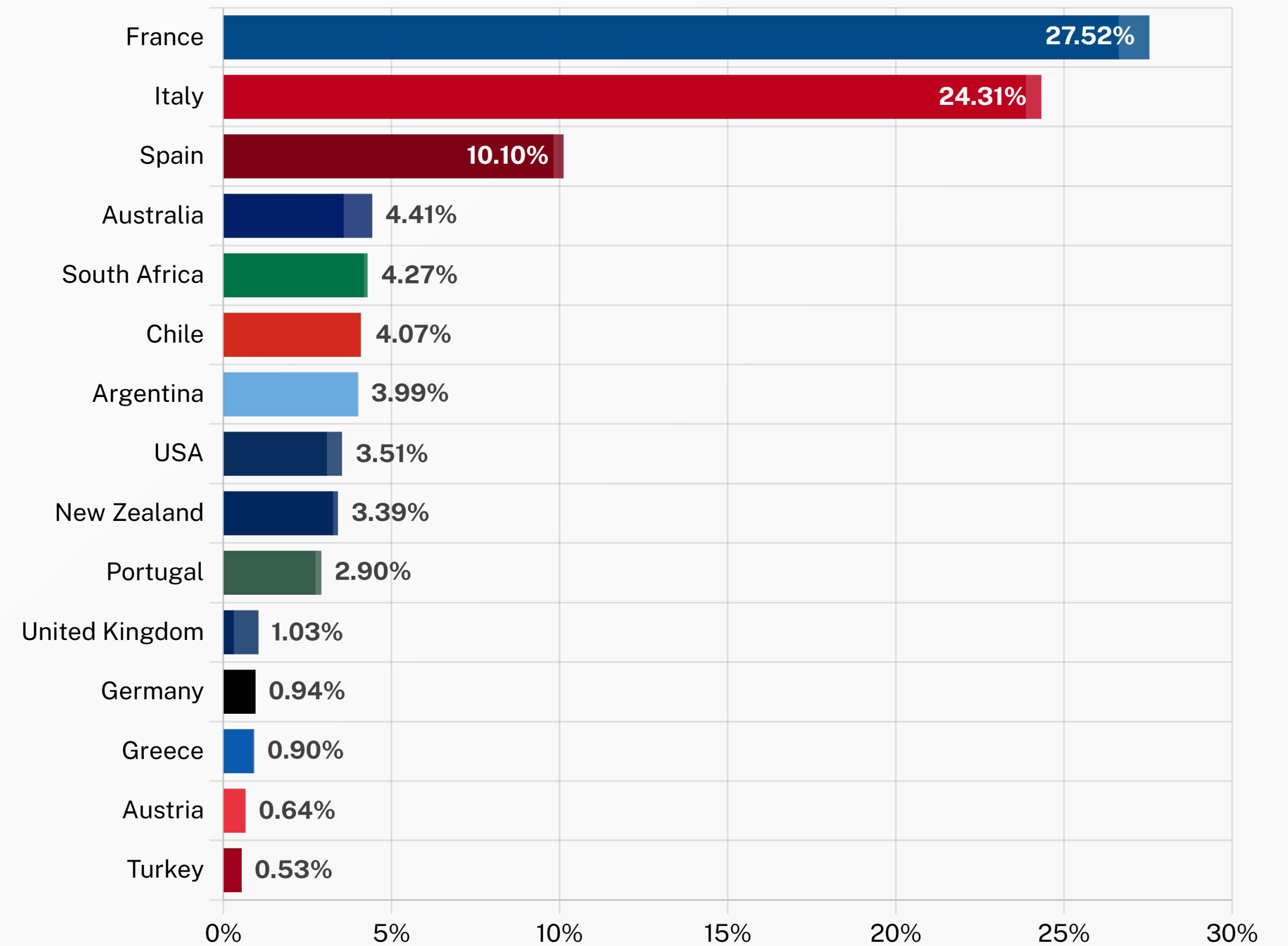
Historically in Britain, the *term fine wine* was applied to wines that were sold through auctions, narrowing it to Bordeaux, Burgundy, German Rieslings, Port and rare exceptions from other regions. Fine dining implied fine wine, and therefore France is still in first place in total placements in the on-trade sector. Italy made its way to wine lists in the second half of the 20th century, while Germany lost much of its appeal after shifting from quality to quantity in the 1970s.

For by-the-glass placements only, Italy and France switch places on the chart. The median price for French wines in the on-trade is £53 per bottle and £9 per glass; for Italian wines, it is £34 and £7.50.

Australia is the second largest importer by volume after Italy, but most of its wines are sold in supermarkets. In the on-trade, they are distributed mainly through pubs, with *Vinarchy-owned Jam Shed*, imported in bulk and bottled in Britain, being the most widely distributed brand. Around 40% of wines sold in Britain are brought into the country in bulk and bottled domestically, mostly from Australia, New Zealand and South Africa.

Unlike in the US, Spanish wines in Britain have their fair share, without any customer prejudices against them. For the British, Spain is a proper old world winemaking country, and the outstanding value of Rioja wines has long been known to them. But lesser-known Spanish regions and Portugal still have potential for growth.

Countries of origin in on-trade in the UK (% of all placements, still wines only)



Placements in the United Kingdom, BTG and BTB, excluding: Sparkling (explicit and implicit), placements=294,287, wine lists=8,897, establishments=7,602

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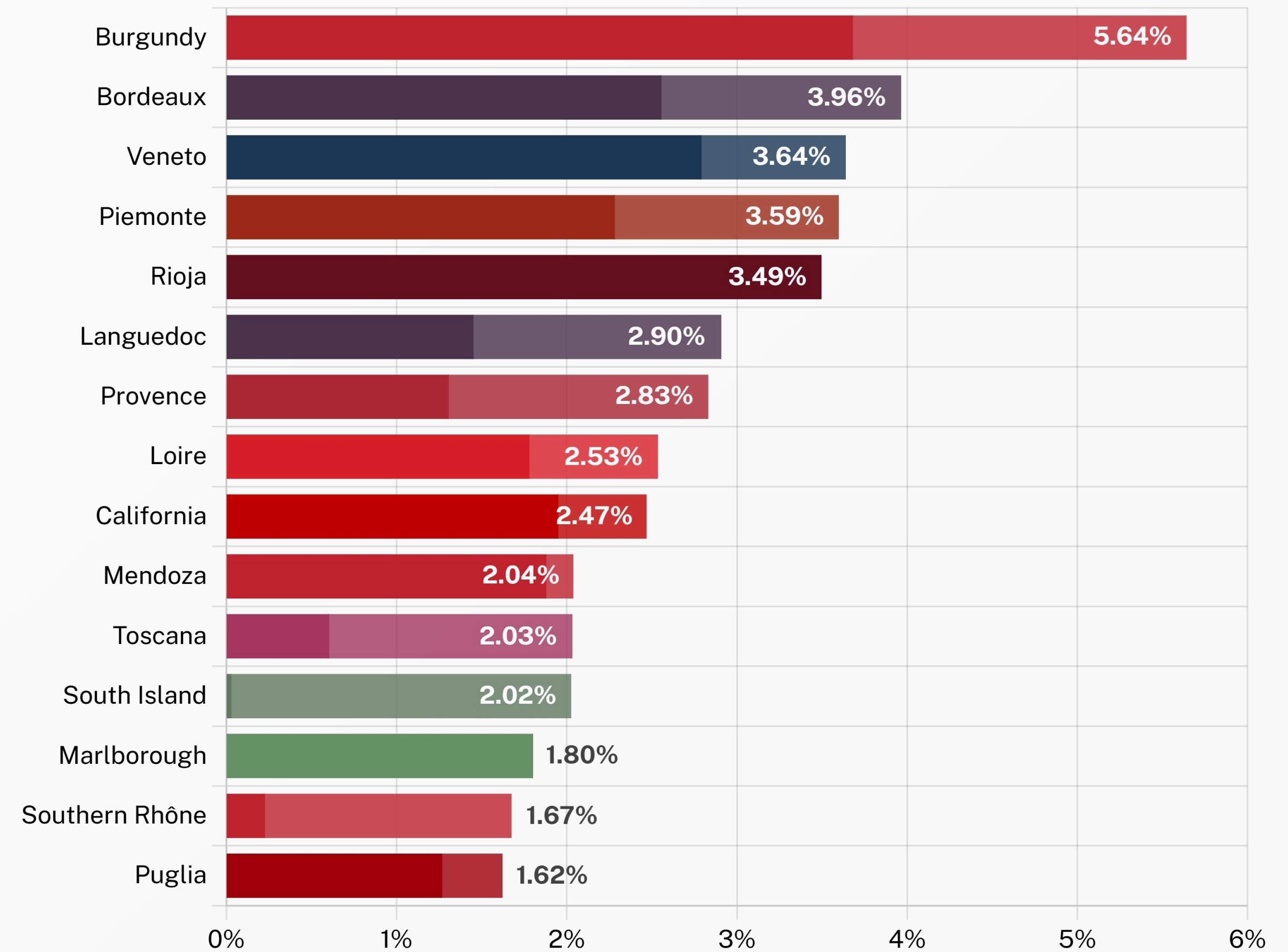
Appellations

The British wine market is more democratic than the American one, in the sense that it is not a *winner-take-all* market. Wine from any appellation and any variety, however little-known, has a chance of success if it has something interesting to offer; the public doesn't have any prejudices. Unlike in the US, the quintessential Bandwagon market, there is no tyranny of the majority. The fashion for certain styles, however, does exist, and Burgundian aesthetics has been more popular than Bordelaise in recent decades. Bordeaux, a wine created for the British market, is still in second place in the UK, while in the US it has fewer placements than Oregon.

Bordeaux, Veneto, Piedmont and Rioja have roughly equal shares, reflecting the democratic nature of the market. Only 31% of Veneto placements account for Pinot Grigio delle Venezie, the ubiquitous pub wine. In contrast to the US, Rioja with its emphasis on value holds a very strong position especially outside London, where it is overshadowed by various French regions. The wines of the Loire are equally popular in London and in New York, with a similar structure of appellations within the region.

Tuscany seems underrepresented in Britain, having the same share as New Zealand's Marlborough. In London its presence is noticeably higher, although with fewer listings of Chianti or Chianti Classico.

Appellations in on-trade in the UK (% of all placements, still wines only)



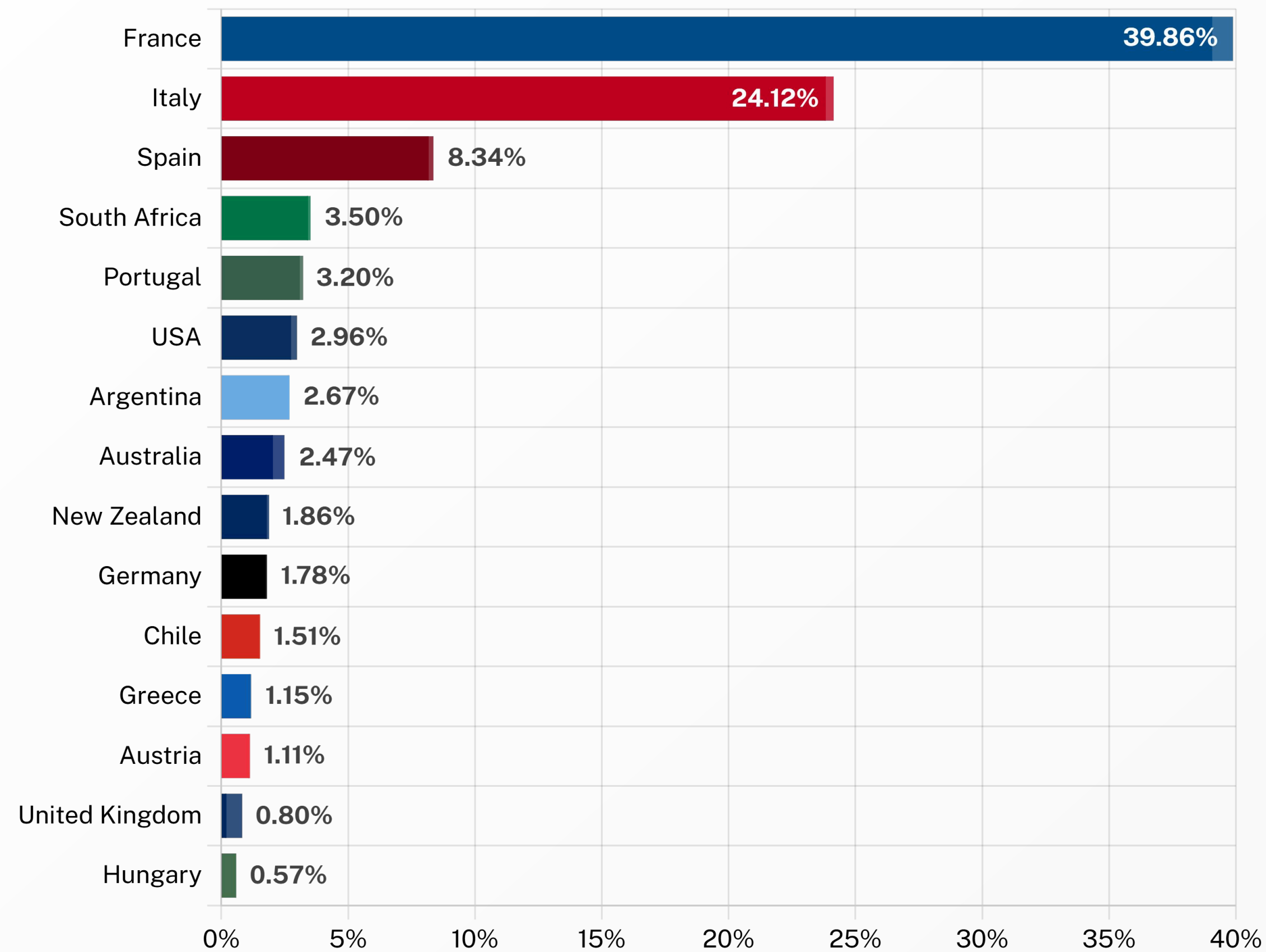
Placements in the United Kingdom, BTG and BTB, excluding: Sparkling (explicit and implicit), placements=294,287, wine lists=8,897, establishments=7,602

Version: v1.1beta/2026 db Nov 2025

London prefers Burgundy

Countries of origin in on-trade in London

(% of all placements, still wines only)

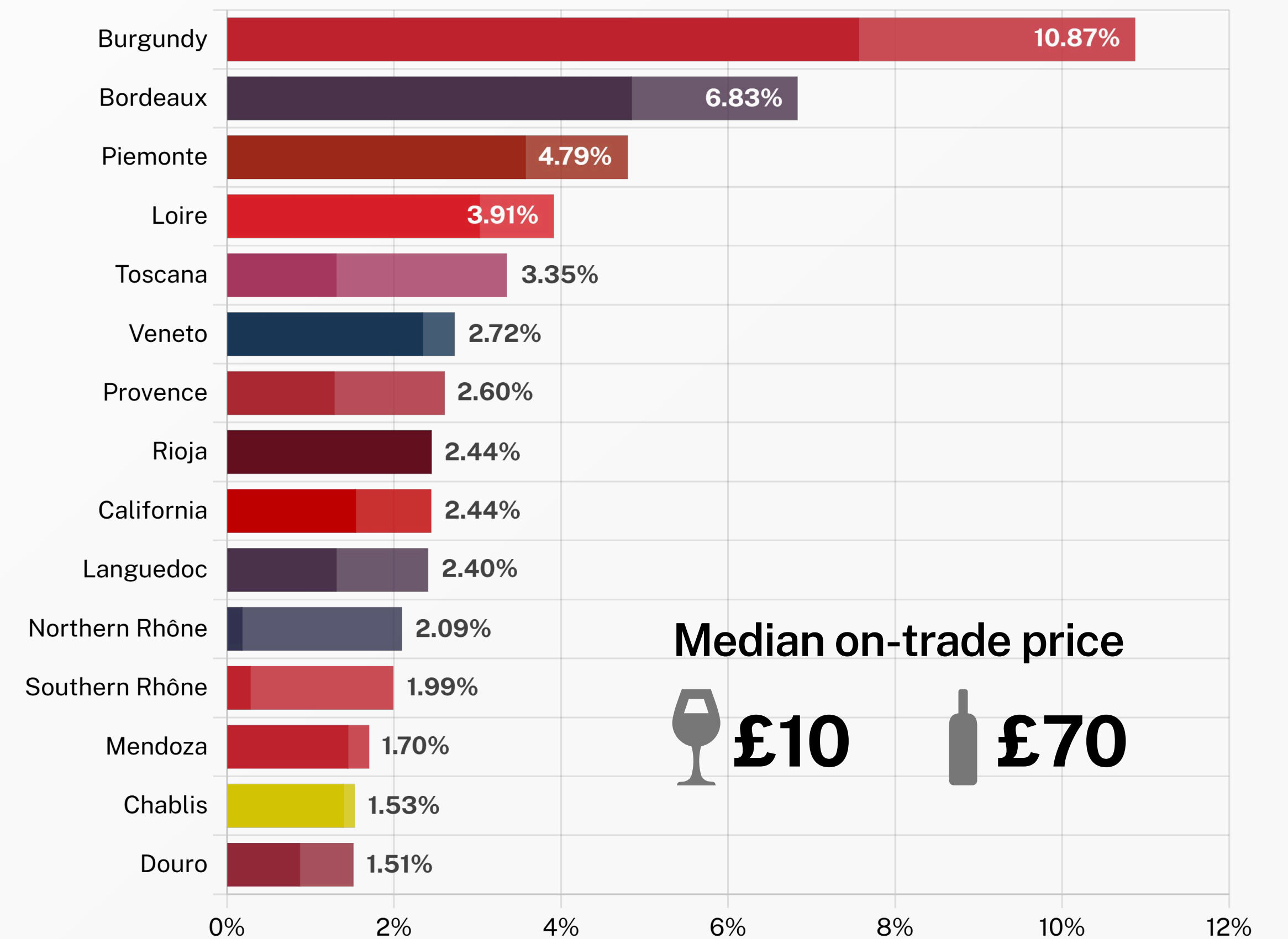


Placements in the United Kingdom, BTG and BTB, London, excluding: Sparkling (explicit and implicit), placements=68,658, wine lists=1,168, establishments=853

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Appellations in on-trade in London

(% of all placements, still wines only)



Placements in the United Kingdom, BTG and BTB, London, excluding: Sparkling (explicit and implicit), placements=68,658, wine lists=1,168, establishments=853

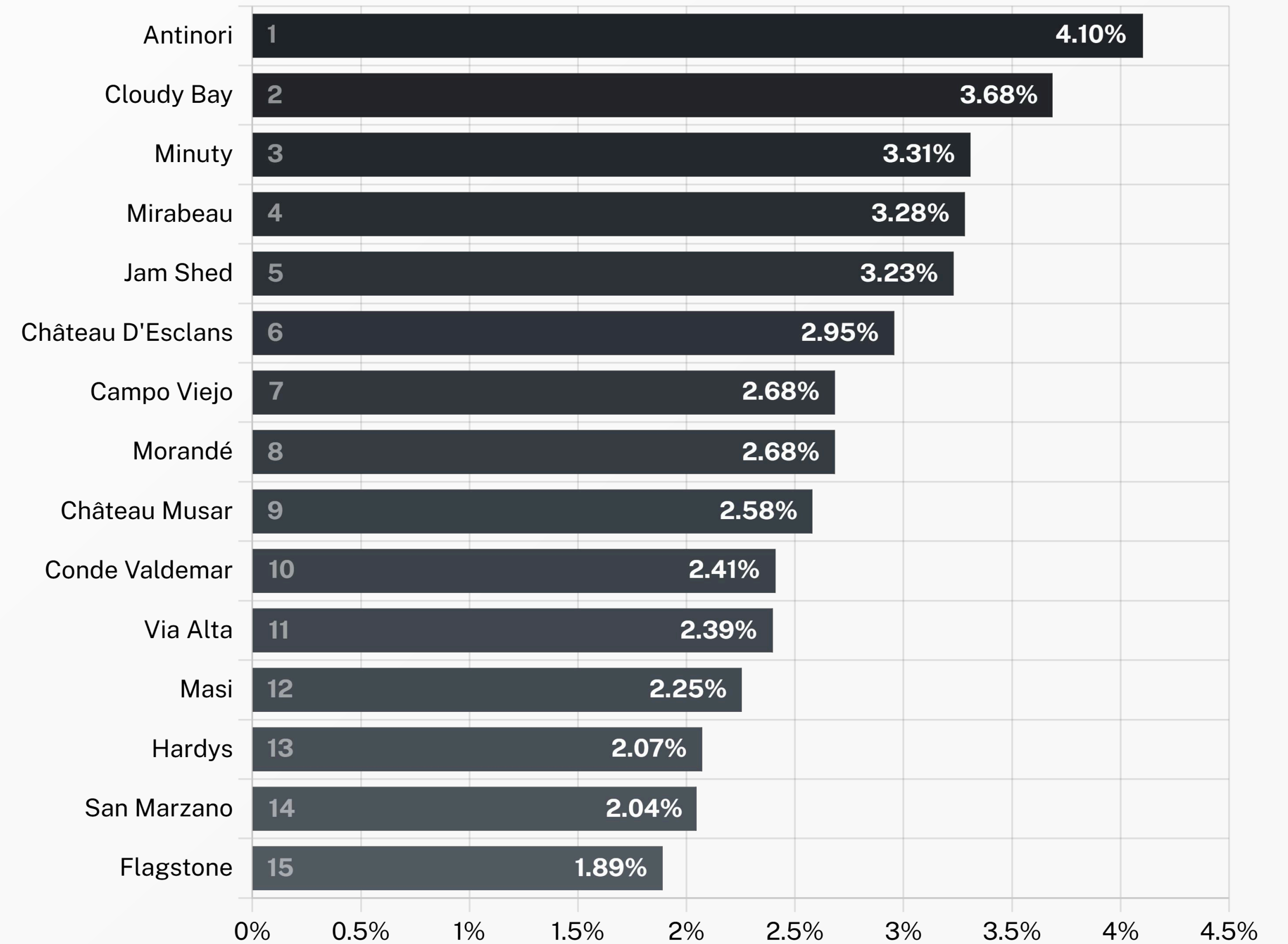
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Brands

While the American wine market is the market of big brands, the British market for still wine is not. Why carry the same wines as your competitors? For the British (and in the majority of markets around the world), wine is a journey of discovery, not a performance when you are judged by neighboring tables at a restaurant. In contrast to 15% of restaurants in the US carrying *Caymus*, a wine with strong connotations within the professional community yet very popular among customers, the 4% of the UK on-trade venues having at least one wine from *Antinori* seems entirely reasonable. Among by-the-glass placements, the leader is *Jam Shed*, a commercial Australian wine served in casual establishments, but with only 3.3% of market penetration – compare it to *Kendall-Jackson's* 12% in the US. This is also consistent with the fact that the UK market is more fragmented than the US market, which is highly consolidated.

The brands dedicated solely or mostly to rosé wines have noticeably high market penetration (*Mirabeau*, *Minuty*, *Château d'Esclans*), on par with the brands that offer broader styles. It is remarkable that they retain their positions among by-the-glass placements – rosé is a BTG-friendly style. Does it mean that for rosé a brand is more important, or is this a byproduct of the distribution structure? These are not necessarily mutually exclusive.

Brands in on-trade in the UK
 (% of all establishments carrying, still wines only)

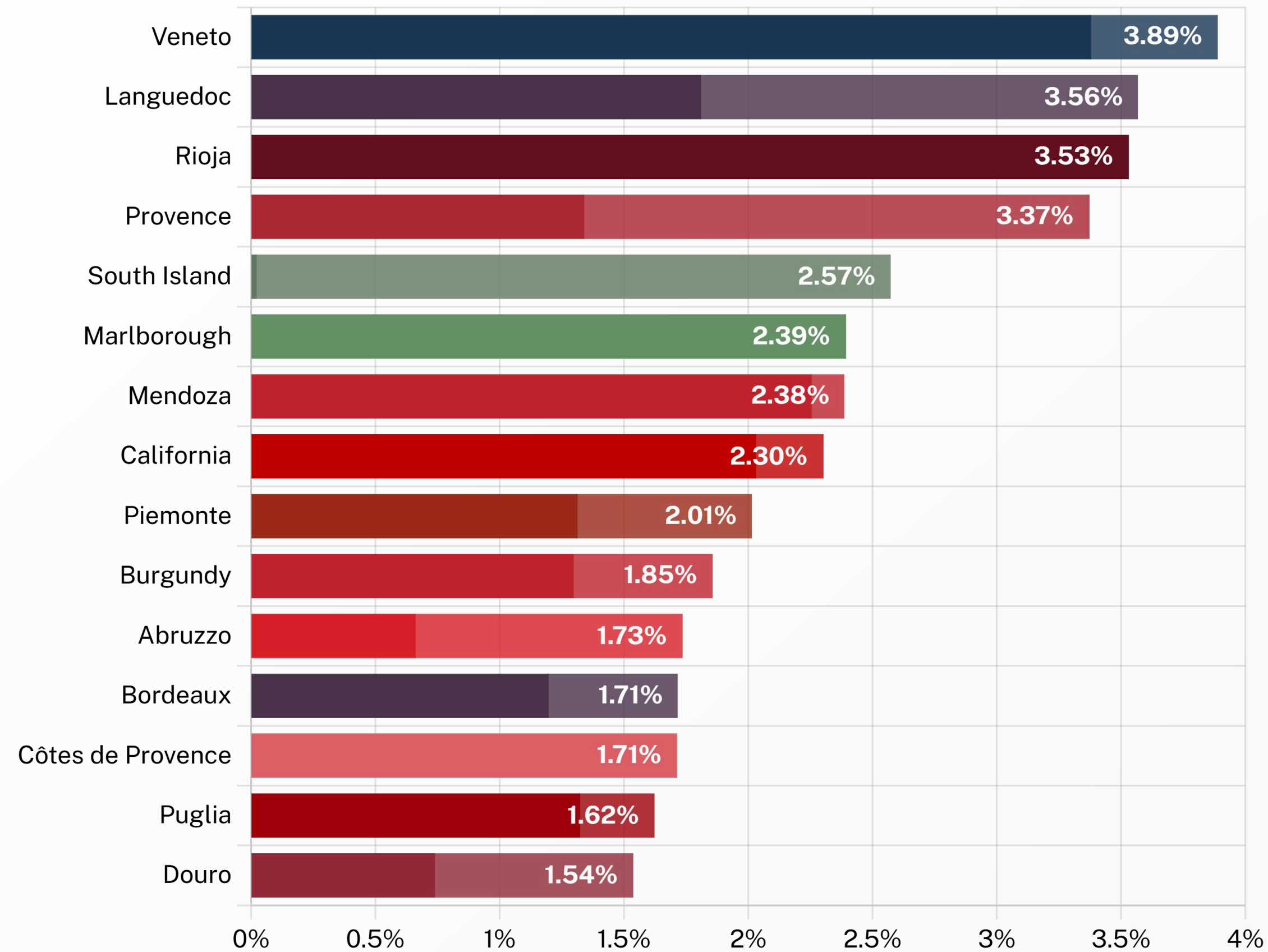


Establishments in the United Kingdom, BTG only, excluding: Sparkling (explicit and implicit), placements=100,843, wine lists=7,546, establishments=6,604

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By the glass

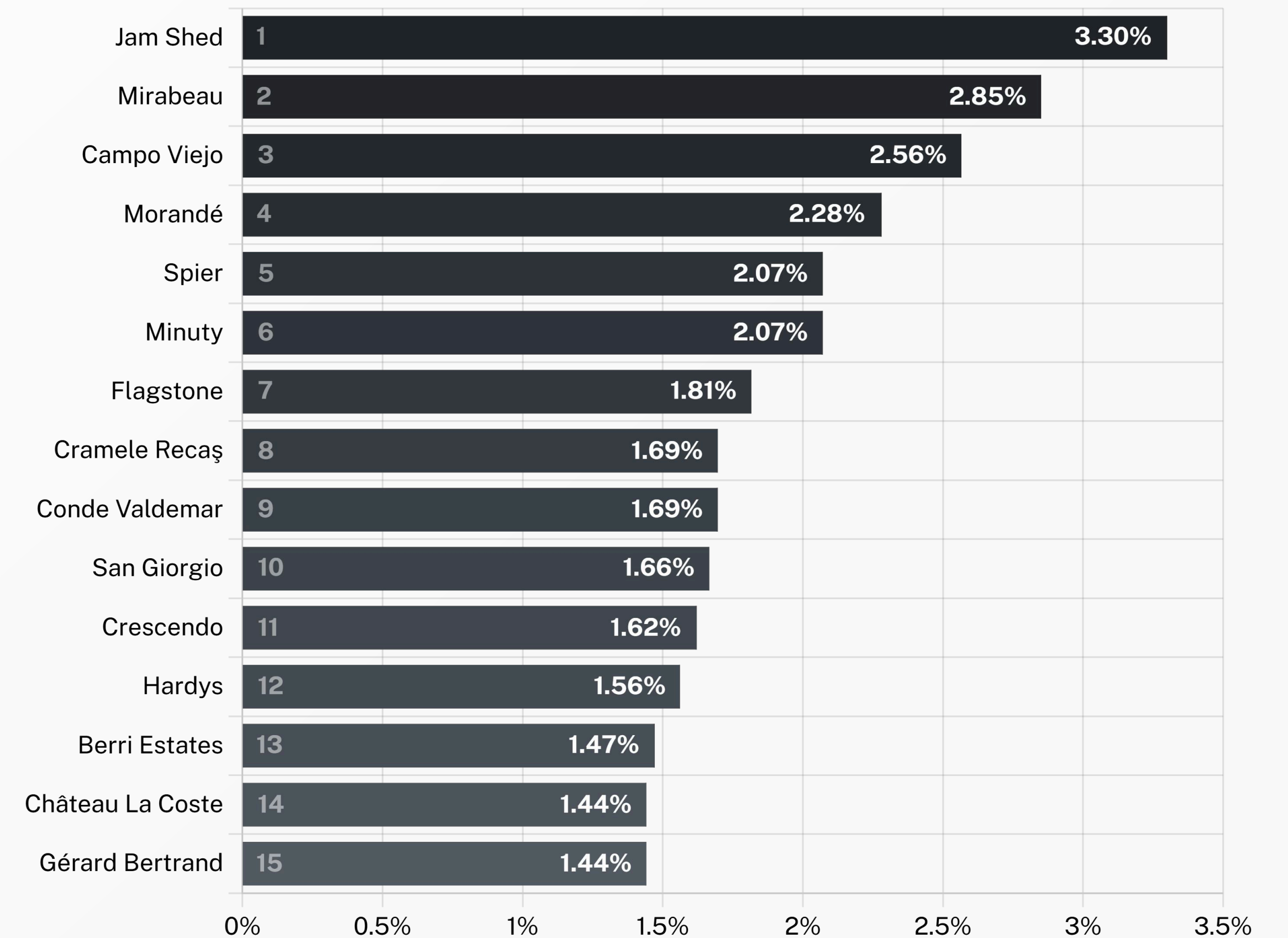
BTG, appellations in on-trade in the UK
 (% of all by-the-glass placements, still wines only)



Placements in the United Kingdom, BTG only, excluding: Sparkling (explicit and implicit), placements=100,843, wine lists=7,546, establishments=6,604

Version: v1.1beta/2026 db Nov 2025

BTG, brands in on-trade in the UK
 (% of all establishments carrying by-the-glass, still wines only)



Establishments in the United Kingdom, BTG only, excluding: Sparkling (explicit and implicit), placements=100,843, wine lists=7,546, establishments=6,604

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Sparkling wine

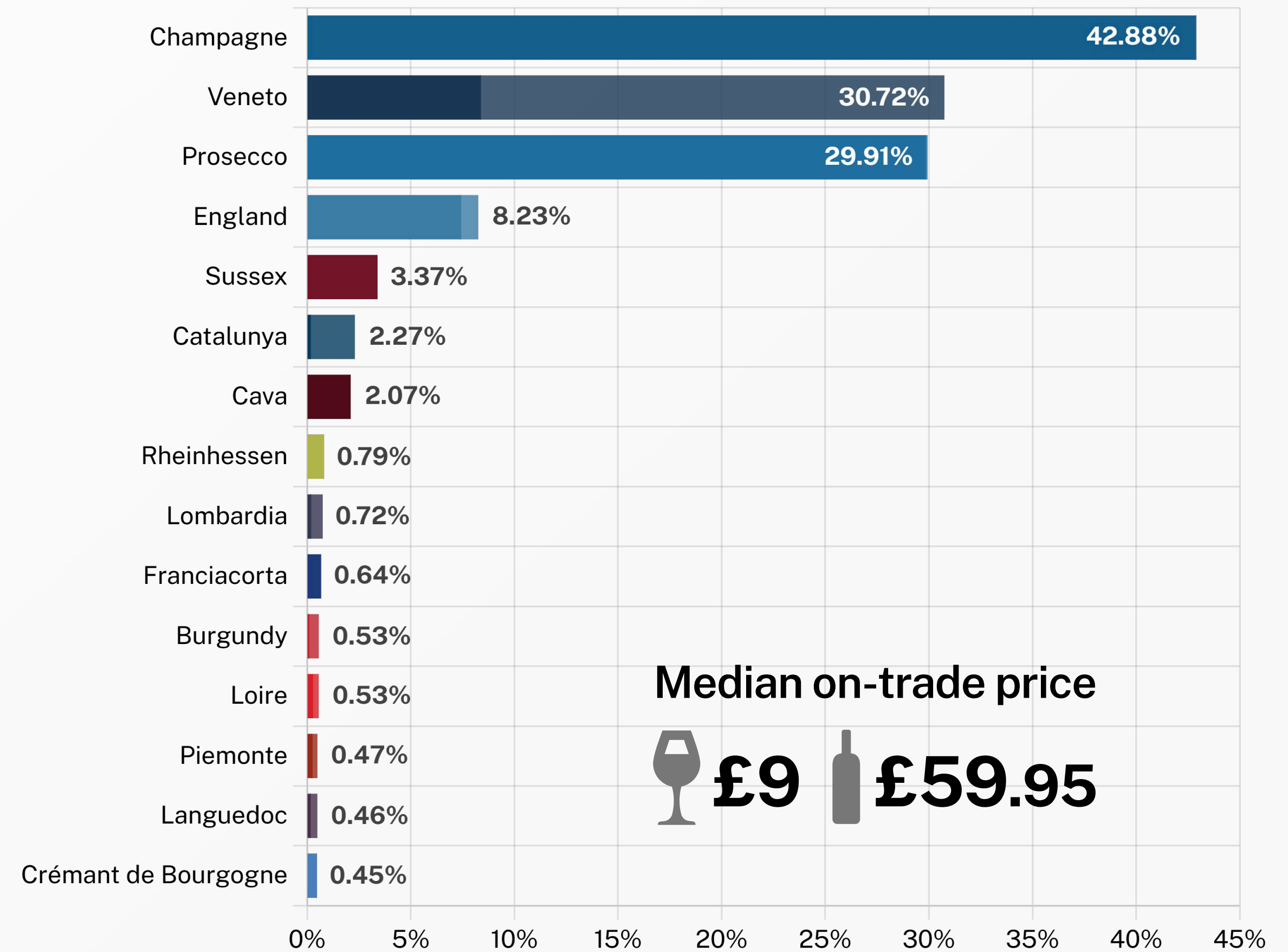
Champagne was de facto invented by the English and for the English and has remained a staple of London society since the 17th century. In total, London has more Champagne placements on wine lists than any other city in the world.

The modern British, especially outside London, are quite fond of Prosecco. In 2024, almost 40% of wine imports from Italy accounted for this appellation. There are twice as many by-the-glass placements of Prosecco as of Champagne. Although Cava usually has similar price points and it is made by the traditional method with lees aging in a bottle, its popularity cannot compare with the most popular style of Italian sparkling wine.

English sparkling wine has been popular since the turn of the century, and many of the British take pride in enjoying it. It is, however, a premium product, with the median on-trade price of £65 per bottle and £13.10 per glass. In London, 14.6% of all sparkling wine placements correspond to Prosecco and 9.4% to English sparkling wine; throughout the country, it is 30% and 8.2%.

Franciacorta, Trentodoc and Cremants have a very limited presence in the UK, similar to the US. But the British aren't interested in sweet sparkling wines: Asti has only 0.24% of placements, compared with 1.36% in the US.

Sparkling wine appellations in on-trade in the UK (% of all sparkling wine placements)



Placements in the United Kingdom, BTG and BTB, filtered by tags: Sparkling (explicit and implicit), placements=52,954, wine lists=7,550, establishments=6,7

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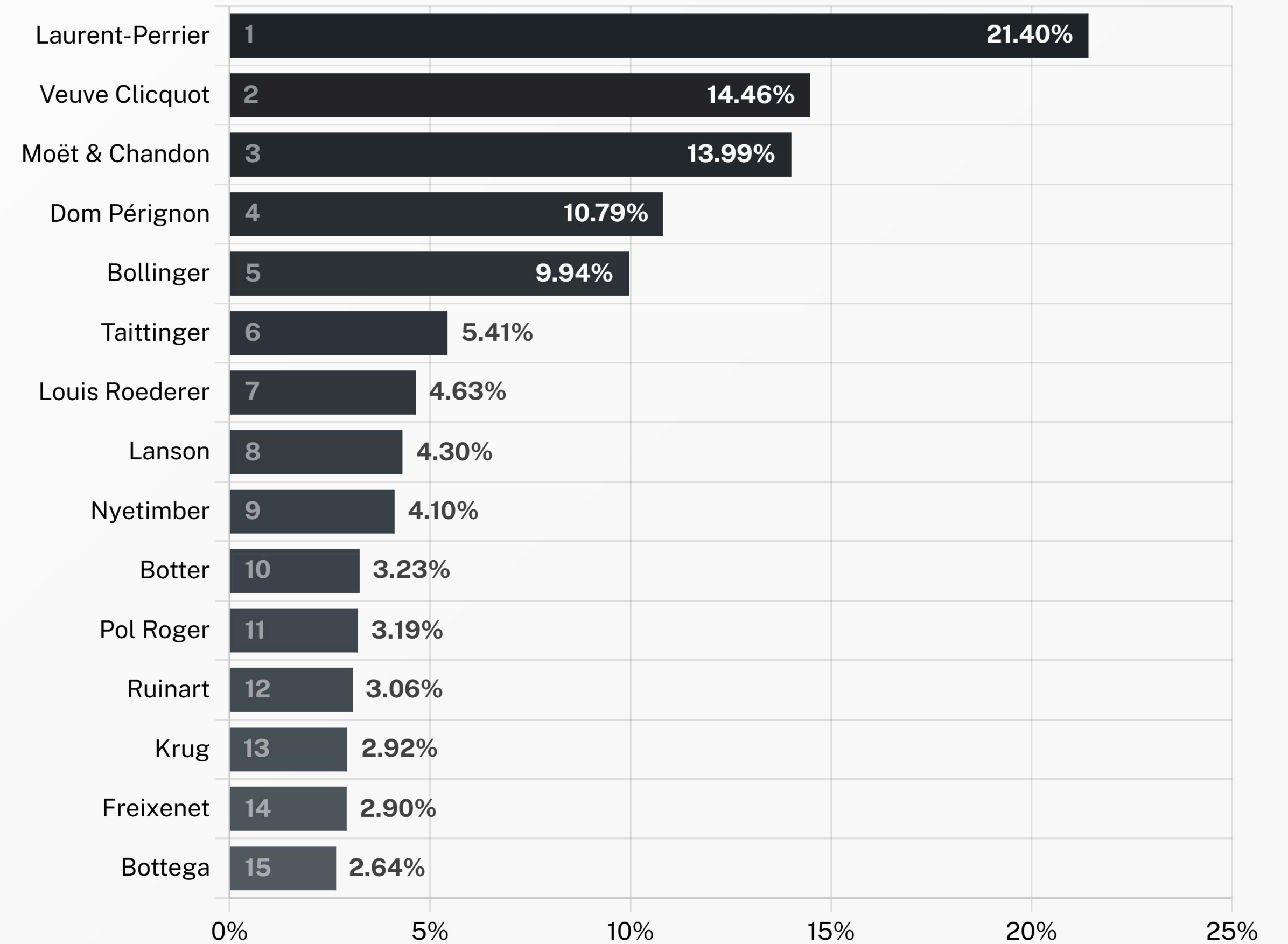
Sparkling wine brands

In sharp contrast to still wines, the market for sparkling wines is the market of brands; it's a Bandwagon market with levels of penetration similar to those in the US or even higher. *Laurent-Perrier* is the leader – a stunning 21% of British establishments carry this champagne. The brands owned by *LVMH* are as ubiquitous as in America.

The UK sparkling wine market is structurally very close to the one in the US. Why is this the case? When it comes to sparkling wine, the British public seems to behave similarly to Americans when they consume any wines, still and sparkling: it becomes less of an exploratory journey and more a hedonic pastime in a safe space of familiar brands that convey certain lifestyle values. The purpose of sparkling wines in Britain is different to that of still wines; the novelty of experience is less important.

While the *Botter* prosecco is a nationwide leader in sparkling wines served by the glass, in London it is in 15th place. The BTG leader in the capital is *Nyetimber*, the most widely distributed English sparkling wine. In third place in BTG listings in London, after the *Laurent-Perrier* champagne, is *Wild Idol*, a non-alcoholic sparkling wine made in the UK from German grape juice.

Sparkling wine brands in on-trade in the UK
(% of all establishments carrying)

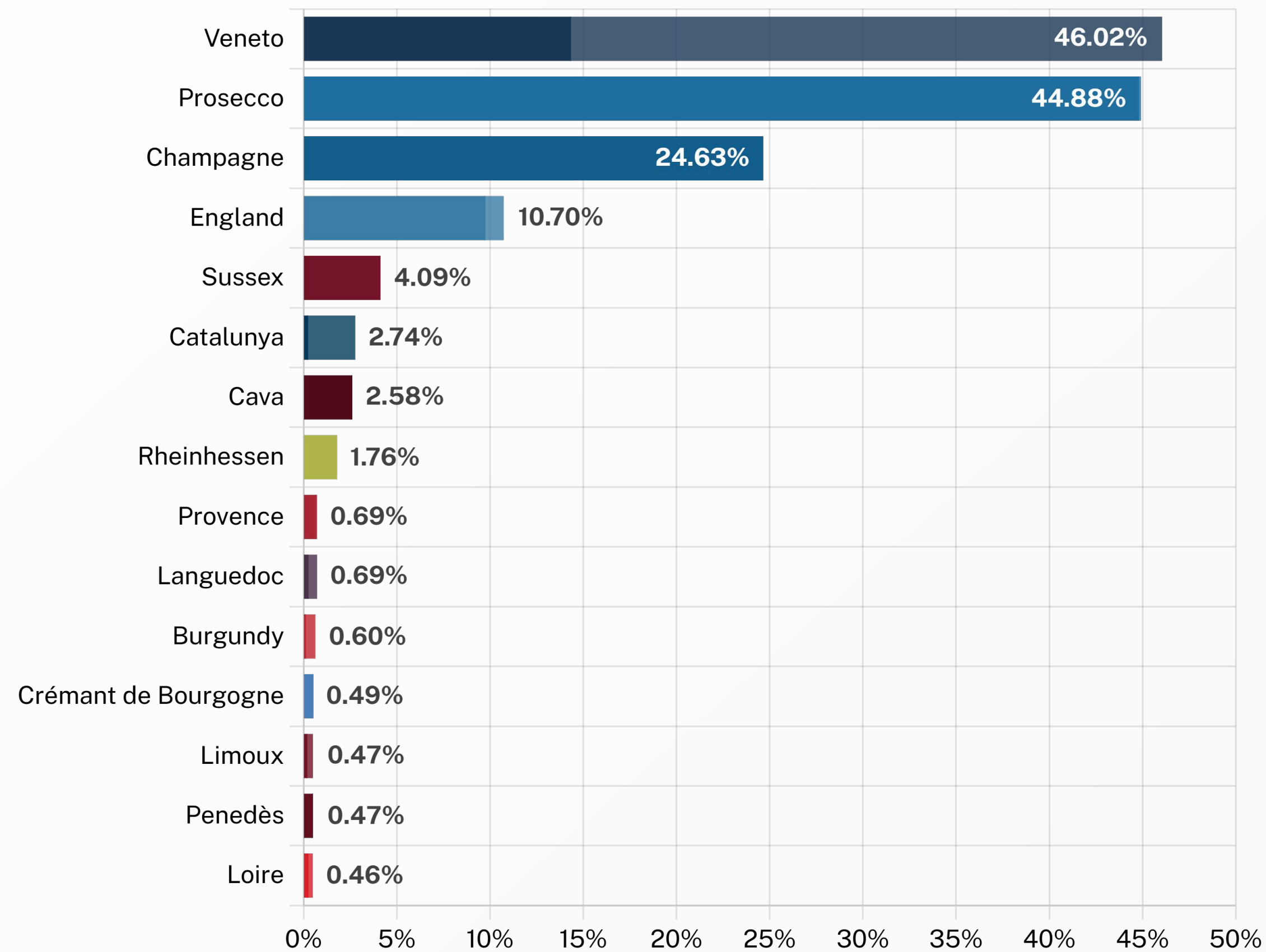


Establishments in the United Kingdom, BTG and BTB, filtered by tags: Sparkling (explicit and implicit), placements=52,954, wine lists=7,550, establishments=6,778

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Sparkling wine by the glass

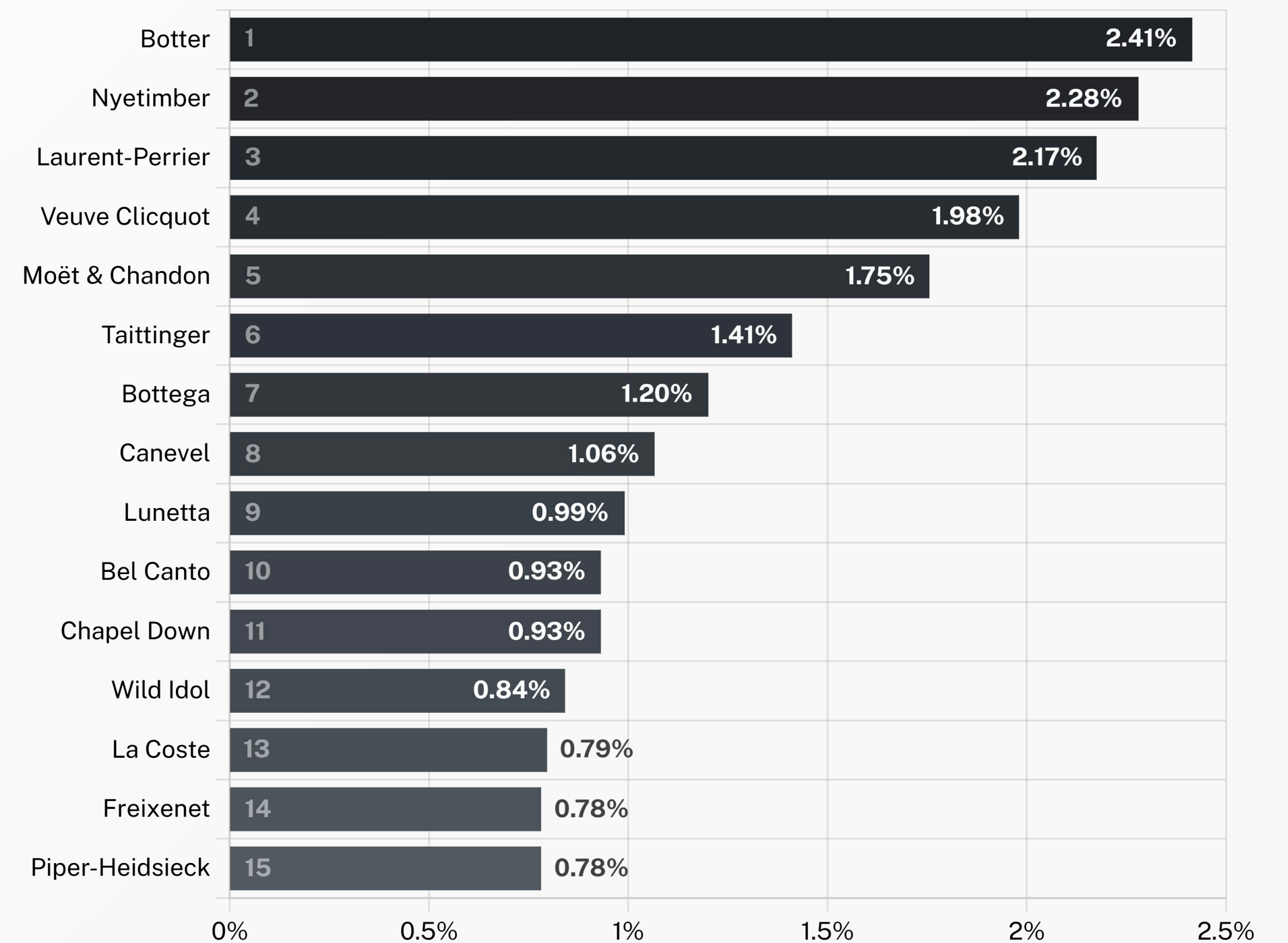
BTG, appellations in on-trade in the UK
(% of all by-the-glass placements)



Placements in the United Kingdom, BTG only, filtered by tags: Sparkling (explicit and implicit), placements=14,308, wine lists=5,042, establishments=4,594

Version: v1.1beta/2026 db Nov 2025

BTG, brands in on-trade in the UK
(% of all establishments carrying by-the-glass)

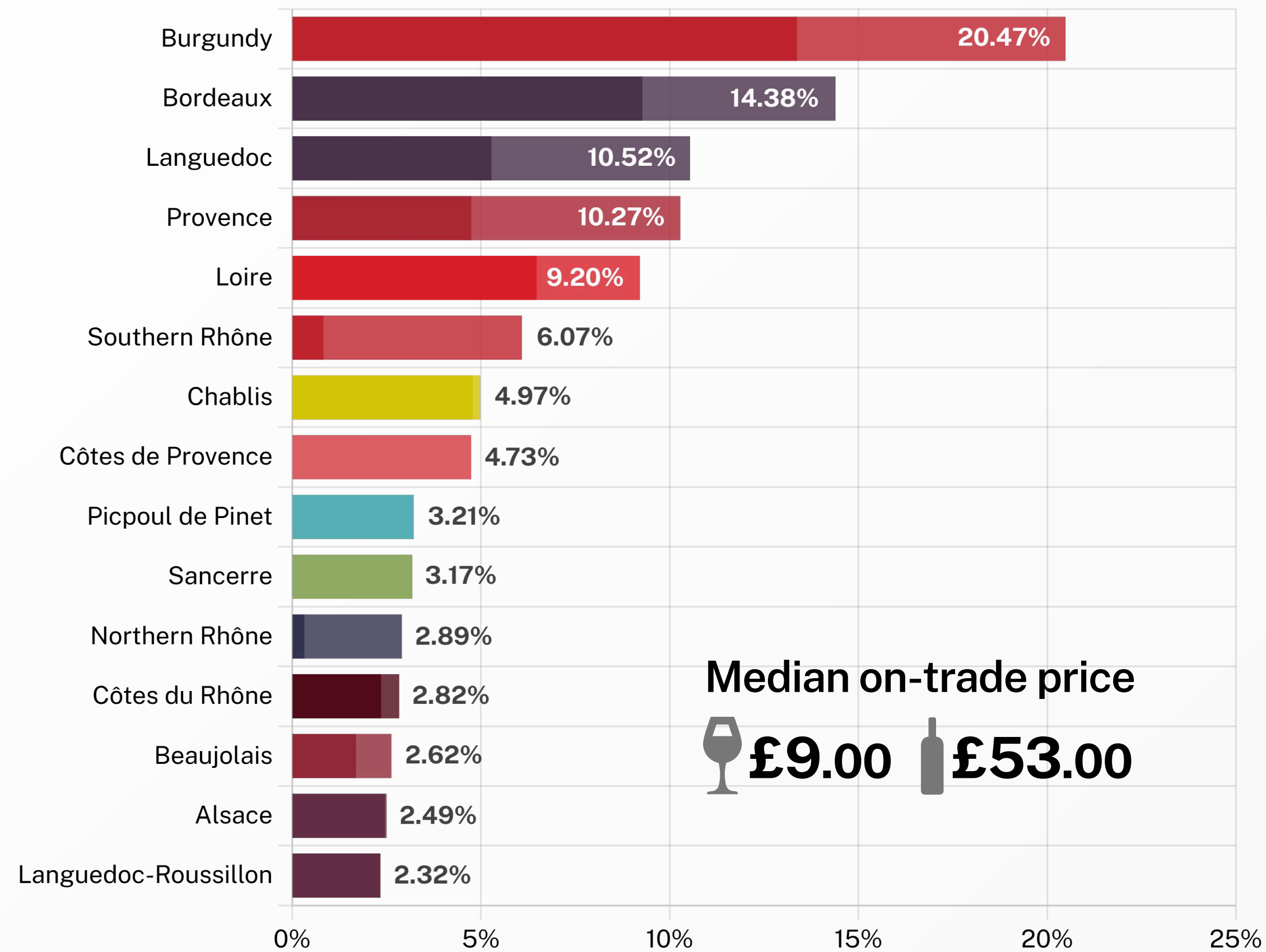


Establishments in the United Kingdom, BTG only, filtered by tags: Sparkling (explicit and implicit), placements=14,308, wine lists=5,042, establishments=4,594

Version: v1.1beta/2026 db Nov 2025

French wines in the UK

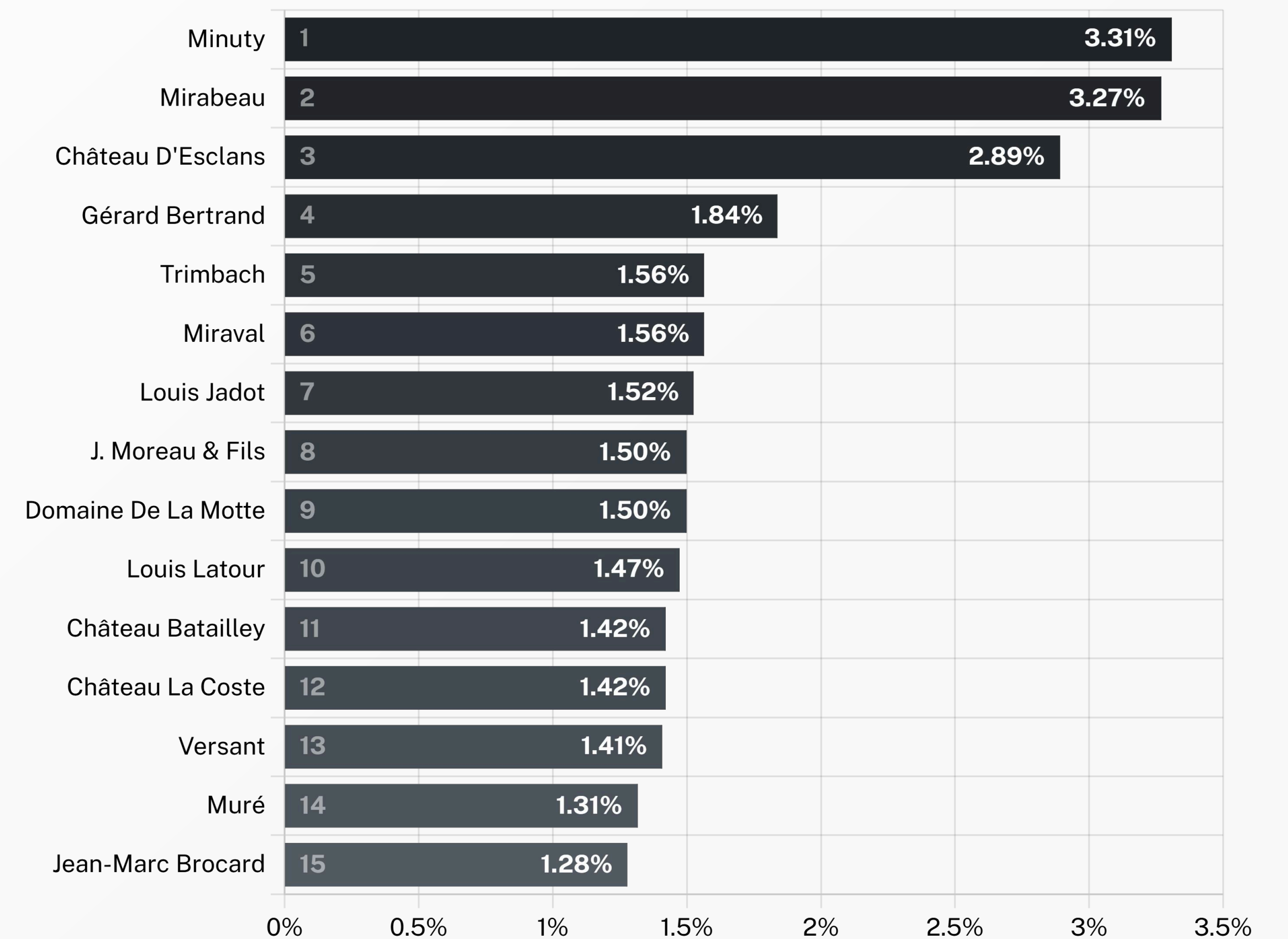
Appellations in on-trade in the UK
 (% of all French wine placements, still wines only)



Placements in the United Kingdom, BTG and BTB, filtered by tags: France (explicit and implicit), placements=106,436, wine lists=7,007, establishments=6,107

Version: v1.1beta/2026 db Nov 2025

French wine brands in on-trade in the UK
 (% of all establishments carrying, still wines only)

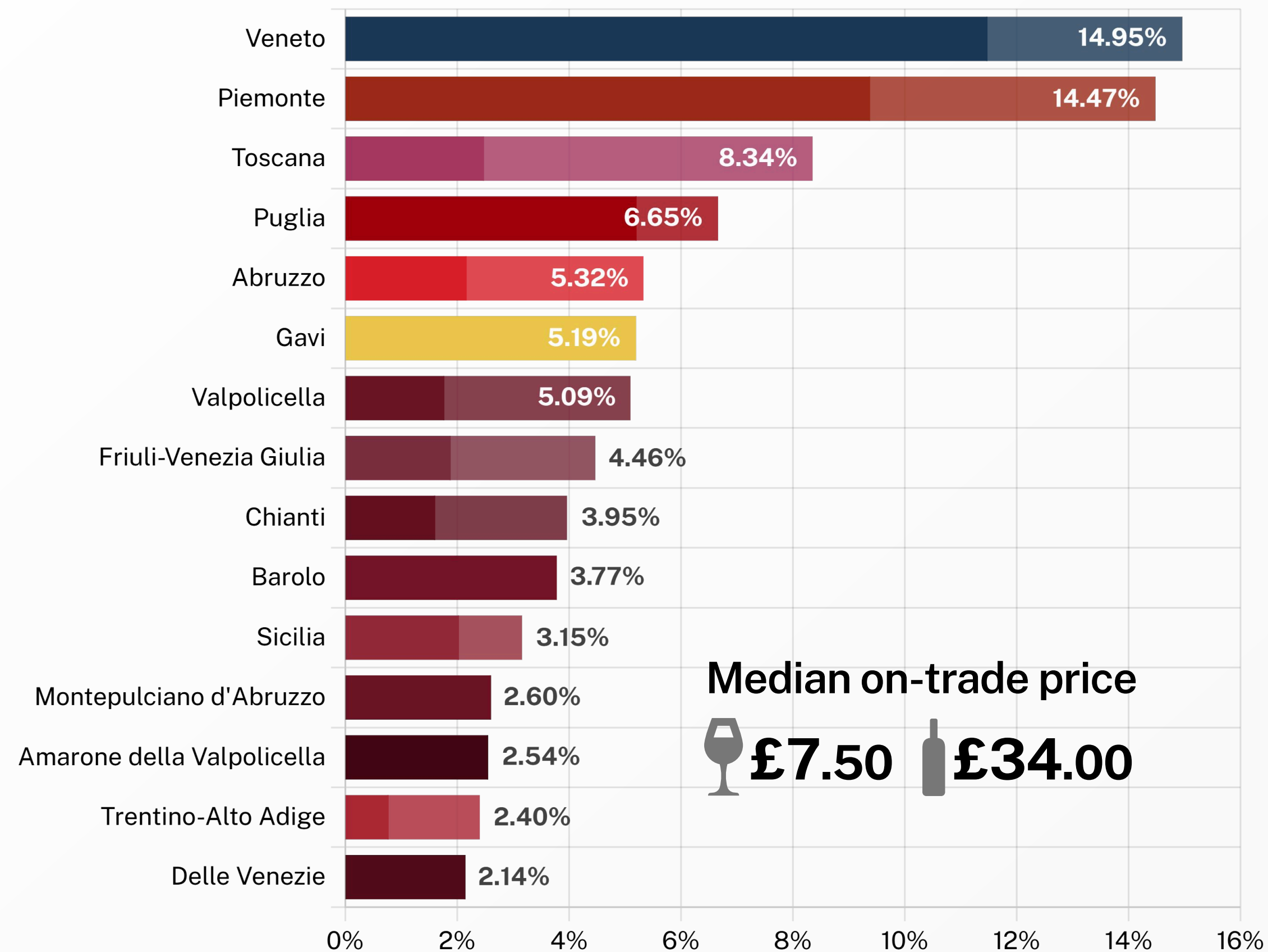


Placements in the United Kingdom, BTG and BTB, filtered by tags: France (explicit and implicit), excluding: Sparkling (explicit and implicit), placements=80,984, wine lists=6,103, establishments=5,357

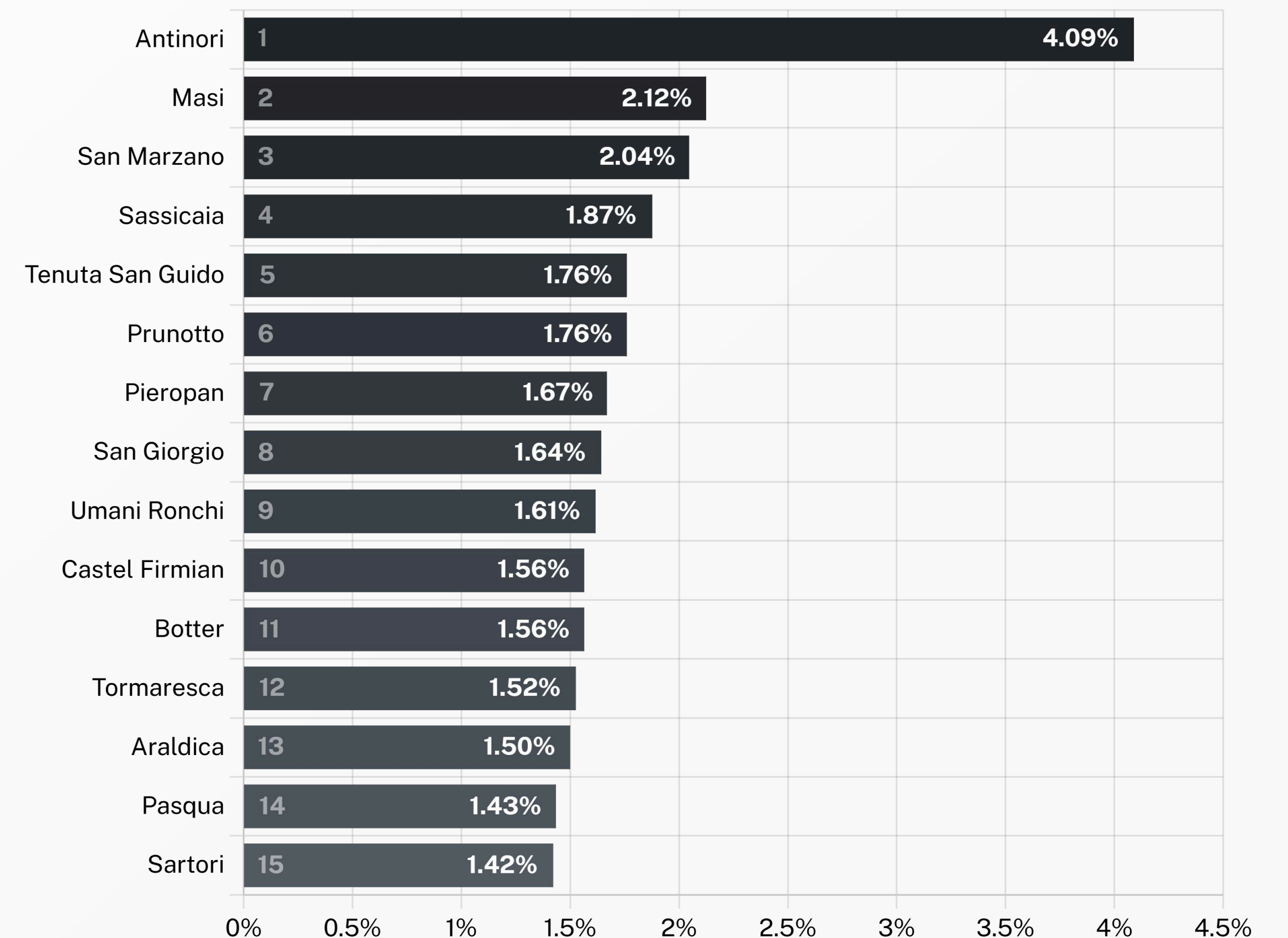
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Italian wines in the UK

Appellations in on-trade in the UK
(% of all Italian wine placements, still wines only)



Italian wine brands in on-trade in the UK
(% of all establishments carrying, still wines only)



Placements in the United Kingdom, BTG and BTB, filtered by tags: Italy (explicit and implicit), excluding: Sparkling (explicit and implicit), placements=71,535, wine lists=7,062, establishments=6,217

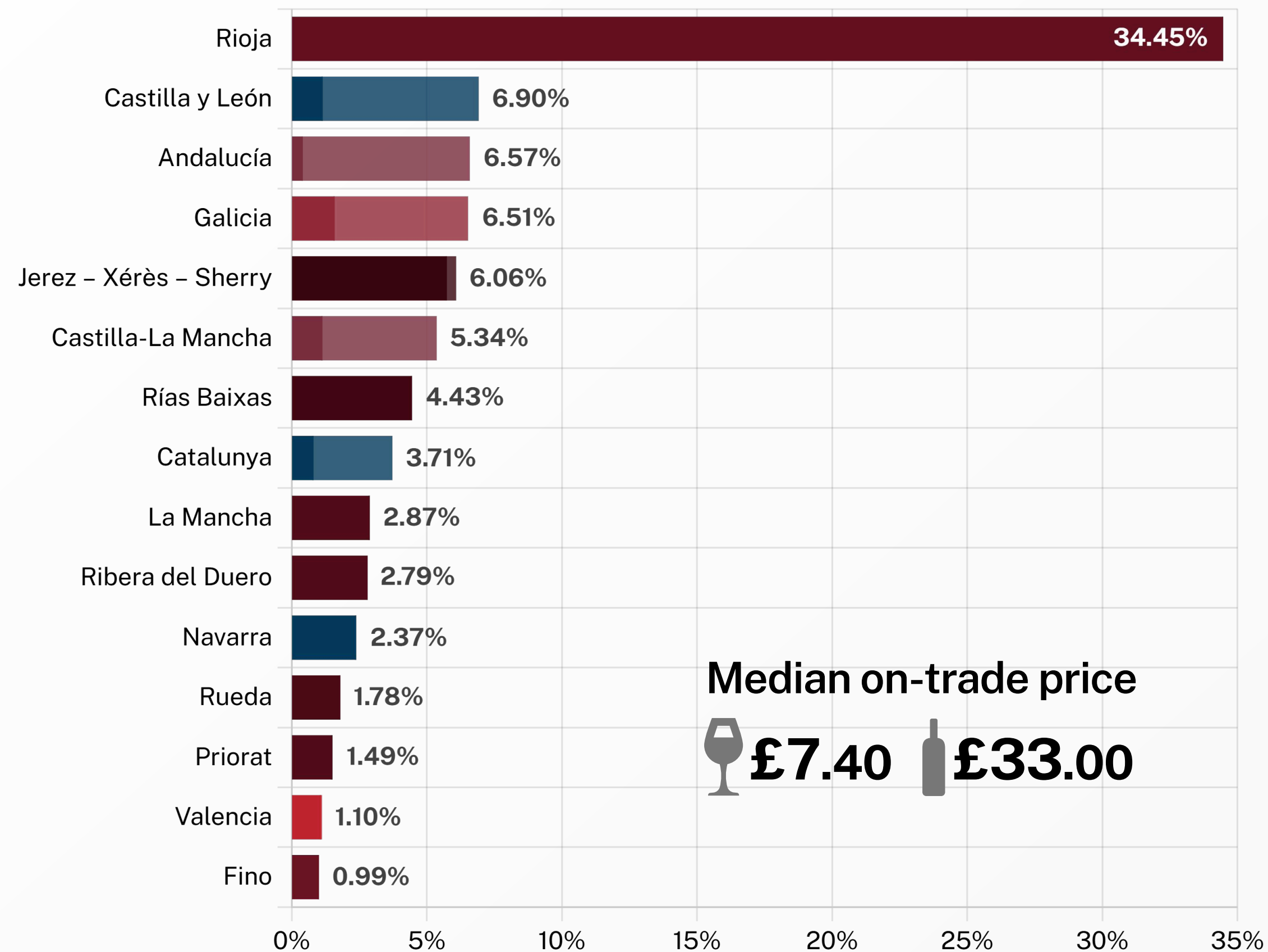
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Establishments in the United Kingdom, BTG and BTB, filtered by tags: Italy (explicit and implicit), excluding: Sparkling (explicit and implicit), placements=71,535, wine lists=7,062, establishments=6,217

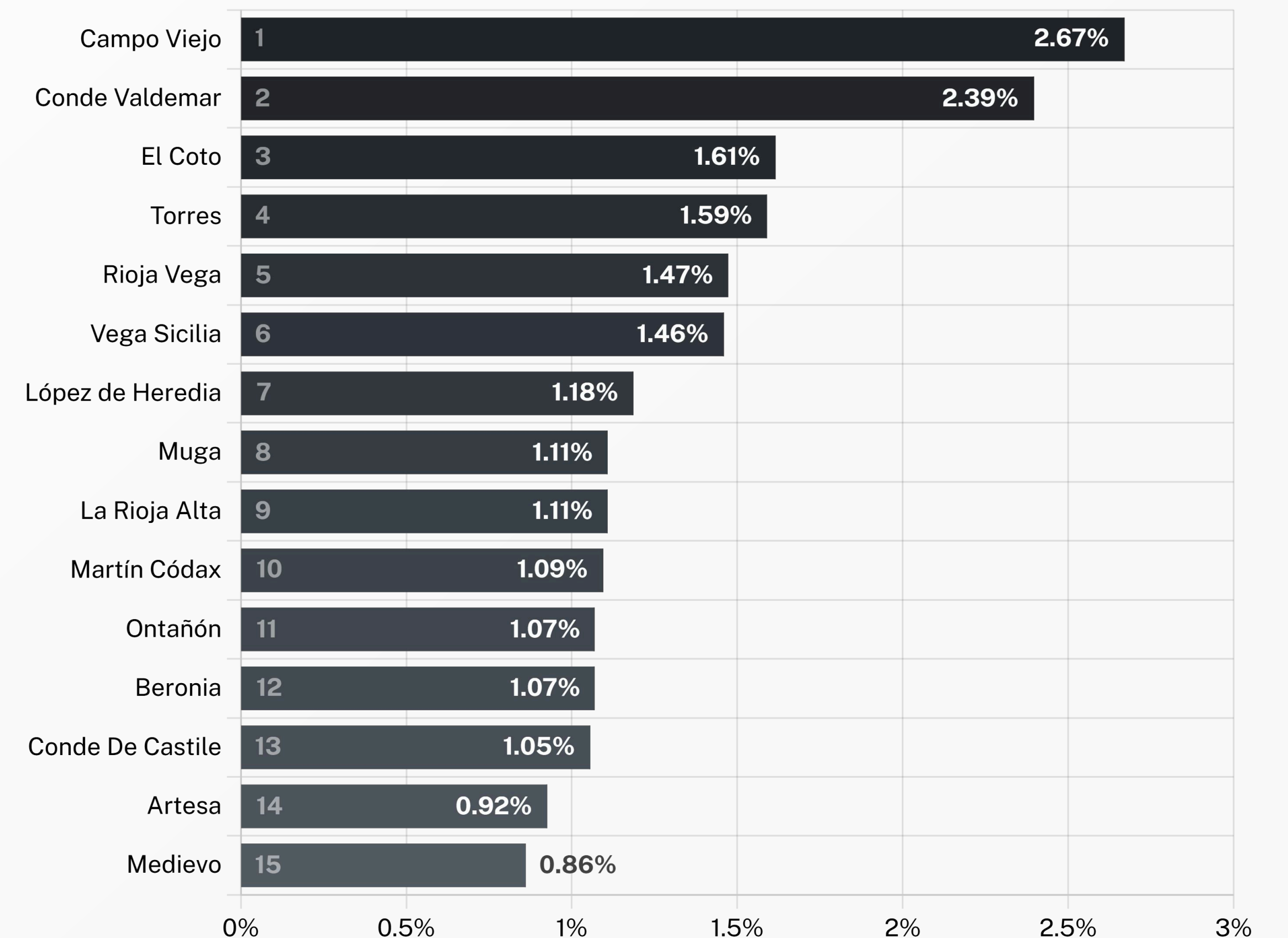
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Spanish wines in the UK

Appellations in on-trade in the UK
 (% of all Spanish wine placements, still wines only)



Spanish wine brands in on-trade in the UK
 (% of all establishments carrying, still wines only)



Placements in the United Kingdom, BTG and BTB, filtered by tags: Spain (explicit and implicit), excluding: Sparkling (explicit and implicit), placements=29,713, wine lists=5,581, establishments=4,938

Version: v1.1beta/2026 db Nov 2025

Establishments in United Kingdom, BTG and BTB, filtered by tags: Spain (explicit and implicit), excluding: Sparkling (explicit and implicit), placements=29,713, wine lists=5,581, establishments=4,938

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Appendix 1. Median prices for selected wines in on-premise in the UK

	On-premise median, bottle	On-premise median, glass	Price at Majestic	On-/off- premise ratio
Jam Shed Shiraz	£21.99	£6.49	£8.50	2.59
Villa Maria Private Bin SB	£27.95	£7.50	£11.25	2.48
Whispering Angel	£50.00	£15.40	£23.00	2.17
Cloudy Bay Sauvignon Blanc	£65.00	£15.13	£31.00	2.10
Vina Tondonia Rioja Reserva	£137.00	£26.00	£52.00	2.63
Tenuta San Guido Guidalberto	£144.50	£25.00	£68.00	2.13
Tignanello	£298.00	£55.00	£192.00	1.55
Antinori Guado al Tasso	£260.00	£45.00	£203.00	1.28
Dom Perignon	£310.00	£68.25	£222.00	1.40
Louis Roederer Cristal	£425.00	£62.00	£263.00	1.62

Appendix 2. WineMarkets.co functionality and pricing

Free tier

Free of charge

- Aggregated data available at the country or US state level, including brands, appellations, countries of origin and grape varieties.
- Flexible filters by brand, appellation, country of origin or grape variety.
- Popularity maps by brand, appellation, country of origin or grape variety.
- Aggregated BTG and BTB prices for any filtered subset.

Sign up for free

Premium tier

\$249 per month for 12 months

Billed at \$2,988 annually

- Everything from the Free tier.
- Detailed geographical data (by city or town and zip/postal code).
- Detailed maps aggregated at the locality, postal code or account level.
- Separate BTG reports.
- Market penetration reports.
- Access to placement-level data.
- Finding similar accounts using feature vectors.
- **Calculation of ideal target profiles for a wine brand or a specific wine.**
- **Automatic creation of target account lists based on pre-calculated target profiles.**

Sign up and upgrade

Enterprise tier

Individual pricing

- Everything from the Free and Premium tiers.
- API integration.
- Brand portfolio management.
- Analytics for the uploaded data.
- Additional metrics.

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