



# THE MID STRENGTH OPPORTUNITY

UNDERSTANDING CONSUMER  
DEMAND AND TRADE POTENTIAL

FEBRUARY 2025

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Soda

**KAM**





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# Introducing the Mid-Strength Collective

**The Mid-Strength Collective** is a powerhouse of leading mid-strength alcohol brands in the UK, united by a shared mission: to empower consumers with more choice in how they drink. By joining forces, we champion mid-strength drinks as a smart and enjoyable way to find balance without compromising on taste or experience. Through commissioned research, impactful awareness campaigns, and collaborative efforts, we're driving the growth of this category - making mindful drinking more accessible, appealing, and mainstream.



We created BRISK to be our perfect midweek beer. Full-flavoured with half the calories, and still with the crisp, citrus taste you'd expect from a proper lager. Brisk is the beer that doesn't slow you down and helps to keep your pace through a busy week.



DECEM was founded by renowned foodie and MasterChef finalist Billy Wright. With a clear mission - to create mid-strength spirits that deliver a rich drinking experience without relying on alcohol to do so. Our innovative 10% GIN has all the classic London Dry flavours at a more approachable ABV, giving drinkers greater choice and the freedom to enjoy more of what they love.



Born and raised in the Netherlands, the birthplace of gin, we grew up alongside a lively, innovative, and ever-changing world of drinks. Mixers should be the life and soul of the party, so we created a business to bring much-needed personality and flavour to the category.



The Hayman family has been crafting gin in London for over five generations, using their original family recipe. They blend tradition with innovation, exemplified by Hayman's London Light, a mid-strength gin at 12.5% ABV. This option offers the full flavor of a G&T while providing a lower alcohol and calorie choice.



6percent is a global award winning range of Premium Mid-Strength Wines traditionally produced in the world famous wine making region of Bordeaux. With half the alcohol and half the calories, it's the wine you love, yet healthier and without the head spinning amounts of alcohol. Enjoy a more balanced lifestyle, without sacrifice.



MAISON SASSY

Maison Sassy is redefining Normandy cider with a modern touch while honoring tradition. Their range contains traditional strength, mid-strength and alcohol-free ciders and is perfect for those seeking a sophisticated, fruity, and refreshing experience, elevating cider to a new level of elegance and enjoyment.

Quarter® Proof

Quarter Proof believe that when done right, drinking is a pleasure. Being drunk is not, and abstinence feels as if something is missing. So we're creating the third wave of drinking, Spirits 3.0 - the sweet spot between 'all-or-nothing'. Mid-Strength Spirits, Full-Strength Flavour.



Session Spirit is home to premium mid-strength spirits. Our 25% ABV London Dry is the only mid-strength spirit to win awards in the full strength category, proving you can enjoy mid-strength spirits all the same but with less alcohol or calories.



The original craft shandy. Now available online, in bars, cafés, supermarkets and independent shops, we're pumped to keep filling your fridges with delicious shandies, and giving you a taste of the British countryside with every glug!



McGuigan Wines have created a range that allows you to make healthier choices without sacrificing the pleasure and taste of a great glass of wine. Whether it's a mid-week gathering, a social get together, or simply a personal decision to moderate alcohol consumption, McGuigan Mid offers an enjoyable option for all of your occasions.

the gentle wine

Traditional wine meets dealcoholized wine. Using a technique that is as old as the world of wine itself: cuvée. We rethink it and blend traditional wine with wine that has previously been gently dealcoholized. Voilà, the gentle with 6%!



Small Beer is for the big thinkers. We're reinvigorating a lost tradition for the people who do it all. That's why we've built a bespoke brewing kit to exclusively produce lower alcohol beer up to 2.8% ABV in the world's first dedicated small beer brewery.

# Foreword



The way consumers engage with alcohol is evolving, and both the hospitality and grocery industries must evolve with it. Across the UK, a significant shift toward moderation is redefining drinking habits, with more people seeking balance between social enjoyment and personal well-being. While some consumers are opting for alcohol-free alternatives, a growing segment is embracing mid-strength alcohol as the perfect middle ground. Allowing them to extend their social experiences without compromising on taste, quality and experience.

This shift presents a major opportunity for hospitality and retail operators, supplier brands, and industry influencers to respond to evolving customer needs, increase dwell time, and drive incremental sales. Yet, despite rising demand, mid-strength alcohol remains underrepresented in many hospitality venues and grocery retailers. Visibility is low, awareness is fragmented, and consumers often struggle to find options that align with their moderation goals.

This report is designed to bridge that gap. Based on exclusive consumer research with a nationally representative sample of 1,000 UK adults (18+), it explores why mid-strength alcohol is gaining traction, how consumer expectations around drinking experiences are changing, and what steps businesses can take to capitalise on this untapped potential. Whether you're a bar, pub, or restaurant operator looking to optimise your drinks menu, a grocery retailer looking to drive footfall and incremental spend, a supplier brand aiming to position mid-strength alcohol more effectively, or just simply someone looking to stay ahead of emerging trends, this report provides critical insights to inform your strategy.

This is more than just another category trend - it's a movement that is redefining the way people drink, socialise, and interact with hospitality venues and grocery retail outlets. Now is the time for businesses to adapt and lead the charge in shaping the future of mid-strength alcohol.



Blake Gladman  
Strategy & Insight Director, KAM

# What is Mid-Strength?

“Mid-strength” lacks an official UK definition beyond alcohol duty thresholds. For this report we start from the assumption that mid-strength drinks have a higher ABV than those typically considered “low alcohol” (up to 1.2% in duty terms, but often including higher ABVs too).

Advertising Standards Agency rules require a clear ABV disclosure when marketing a product as lower strength, with a comparison to the full-strength equivalent drink. The term “light” can only be used if the drink has at least 30% less calories than a typical equivalent. In this report we are generally concerned with drinks that are about two-thirds the strength of full-strength beers and ciders, and around half the strength of full-strength wines and spirits. These definitions will no doubt continue to evolve and spark ongoing debate.

## The Mid-Strength Market Size

It is not easy to find sales data for mid-strength drinks. Partly this is due to a lack of agreed definitions between “low alcohol” and “mid-strength”. Beer is the best-represented drink category with at least some sales data split into ABV bands available for several countries. In most markets, the sales of mid-strength drinks are still low, but there are signs that the growth is picking up, possibly following the phenomenal growth in alcohol-free drink sales in recent years.

Kym Anderson (1) has calculated the shares of alcohol-free, low-alcohol and mid-strength (defined here as 2.8% to 3.5% ABV) beers in total beer consumption for several countries around the world. In most countries mid-strength has a very small market share, but in Australia and Sweden it is approximately 25%. The reasons behind this are thought to be mainly duty thresholds that favour lower ABV beers, and in Sweden also licensing rules that restrict higher ABV beers’ availability. This shows that in the right environment, mid-strength can become a major category.

In the UK, Public Health England (2) did some calculations in 2020. According to them, approximately 10% of wine sales were for wines under 10%. As almost all of this was in the 8% to 10% range, sales of more mid-strength (i.e. 7% and less) wines were still very small. Similarly, less than 5% of beer sales were for under 3.5% ABV beers.

More recent numbers are more positive. IWSR (3) said that UK sales of beer under 3.5% doubled from 2022 to 2023. The recent changes in duty thresholds are expected to help grow the lower ABV drinks market in the UK. Producers and retailers are also getting confident of further growth. Sainsbury’s supermarkets already stocked ten mid-strength wines in early 2024, and planned to grow their range further (4).

### Sources:

- (1) K. Anderson: The emergence of lower-alcohol beverages: The case of beer. [Journal of Wine Economics](#), 2023.
- (2) [Public Health England](#): Review of typical ABV levels in beer, cider and wine purchased for the ‘in home’ market
- (3) [Financial Times](#): UK surge in low-alcohol beer sales tops other countries, 24 September 2024
- (4) [Financial Times](#): Low-alcohol wines that offer great taste without the headache, 16 February 2024



# Three Key Takeouts



## Going for 2 is the new Going for 1

**50%**

of consumers would rather have 2 mid-strength alcohol drinks than 1 full-alcohol drink if they were “just going to the pub for one” with a friend

Hospitality venues benefit as customers are likely to stay for an extra round, increasing revenue without excessive alcohol intake. Similarly, grocery retail insights suggest that customers moderating their intake will still purchase mid-strength products without reducing volume.



## Consumers are coasting

**13%**

of consumers are ‘coasting’, as a way to moderate their alcohol consumption

With a further **11%** drinking mid-strength drinks as part of a ‘zebra-striping’ tactic (alternating between alcohol, mid-strength and alcohol-free drinks within the same occasion)

Coasting is where consumers will drink mid-strength drinks throughout the entirety of the social occasion at home or when out in a venue. Drinking the same number of drinks, if not more,, because they can continue to enjoy the experience without destabilising the equilibrium.



## Getting the mid-strength message right in retail can drive sales

**71%**

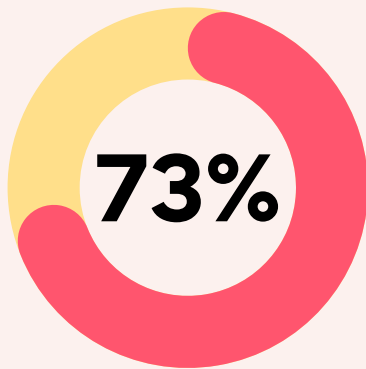
of consumers would be influenced to purchase by additional information/messaging on mid-strength alcohol drinks in the supermarket

Brands and retailers should work together to ensure messaging for mid-strength products is both clear and engaging, as the opportunity is there to grow category sales across all mid-strength products. Consumers need hand-holding in these early-adopter stages for the mid-strength category, but by working closely with the brands leading the trend, they can see their sales soar.



# The Rise of Moderation

## A fundamental shift in consumer drinking habits



Of consumers are currently moderating their alcohol consumption to some extent

The way consumers approach alcohol consumption is changing dramatically. Moderation is no longer a niche trend but a fundamental shift in behaviour. Half of all consumers are actively reducing their alcohol intake, with younger demographics leading the way. This shift is being driven by a combination of health consciousness, financial considerations, and lifestyle choices, as people seek ways to maintain social drinking habits without overindulging.



Consumers are currently trying to moderate their alcohol consumption for the following reasons...



For hospitality and retail operators, this presents a pivotal moment. The demand for mid-strength alcohol is increasing, and those that fail to adapt risk losing customers who are looking for better drinking alternatives. When people actively moderate their alcohol intake, it could have the potential to change how they interact with hospitality venues specifically - staying for shorter periods or ordering fewer drinks for example. However, offering mid-strength options provides a middle ground, retaining customers who might otherwise leave early or limit their spend.

# How Consumers are Moderating



## 21%

Of consumers are still drinking alcohol but having less drinks in total per occasion



## 19%

Are switching between alcohol and non-alcohol drinks on the same occasion



## 13%

Are drinking just mid-strength alcohol drinks on those occasions



## 6%

Are switching between alcoholic and mid-strength alcohol drinks on the same occasion



## 5%

Are drinking a mixture of alcoholic, mid-strength and non-alcoholic drinks on the same occasion

## We call this **COASTING** ↗

Coasting is where customers will drink mid-strength drinks throughout the entirety of the social occasion at home or when out in a venue. Drinking the same number of drinks, if not more, on a night out because they can continue to enjoy the experience without destabilising the equilibrium.

## ↖ We call this **ZEBRA STRIPING**

Zebra Stripping is a drinking strategy that involves alternating between alcoholic, mid-strength and non-alcoholic drinks. It's a way to moderate alcohol consumption without abstaining entirely.

Consumers are actively adopting different strategies to reduce their alcohol consumption, and mid-strength alcohol is uniquely positioned to meet these changing needs. Some are drinking less frequently, some are alternating between alcoholic and non-alcoholic beverages, and others are switching entirely to lower-strength drinks.

**What's important here is that moderation doesn't mean abstinence.** Consumers still want to enjoy the ritual and social benefits of drinking, whether out in a pub or at home, but they also want better control over their alcohol intake. Mid-strength drinks allow them to balance both needs. By choosing a mid-strength option, consumers can extend their time in venues without feeling the effects of high-strength alcohol, making them more likely to stay longer, order more, and return more often. Also, the benefits of consumers employing these methods to the grocery channel is that volume is unlikely to be impacted.

By adopting the **COASTING** moderation tactic, consumers can enjoy mid-strength options across all social occasions, whilst still enjoying the equivalent number of drinks and social experiences as the rest of their group. Meaning that for operators and retailers, offering a great mid-strength range should be a boom for business.

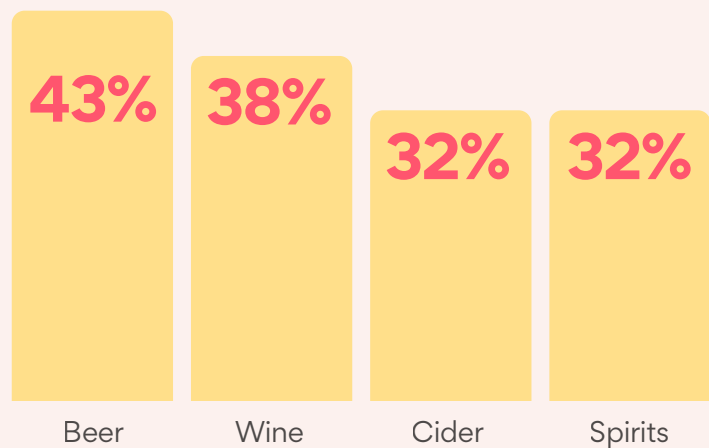


# Consumer Awareness and Perceptions of Mid-Strength Alcohol

Despite its potential, mid-strength alcohol remains relatively underdeveloped in terms of consumer awareness and accessibility.



Consumer awareness of mid-strength variants of the following categories...

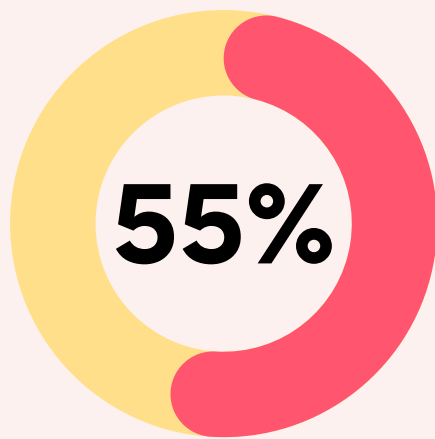


Despite its potential, mid-strength alcohol remains relatively underdeveloped in terms of consumer awareness and accessibility. With less than half of consumers familiar with mid-strength beer, and awareness of mid-strength wine, cider, and spirits even lower.

The challenge isn't just about availability, it's about education and positioning.

Consumers are often unsure about what mid-strength alcohol actually means. Does it taste the same? Is it significantly weaker? Is it a compromise? These unanswered questions create a barrier to trial, preventing the category from growing as quickly as it could. For operators and retailers, it means that there is a major opportunity to bridge this gap by providing clarity on the benefits of mid-strength alcohol.

# The Expanding Market for Mid-Strength Alcohol



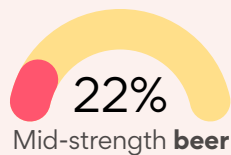
55% of all consumers are interested in exploring mid-strength drinks as an alternative to full-strength drinks.

This is higher with the younger demographics – 71% for 25-34s, 61% for 18-24, but also 35-44s, suggesting that mid-strength has a broader appeal. Appeal is also highest for those who are moderate drinkers (drink 4-10 units per week) – 69%, compared to 46% for low drinkers (3 or less units per week) and 59% for high drinkers (11 or more units per week).

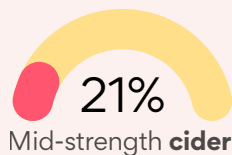
% who **have** tried mid-strength versions of these products previously



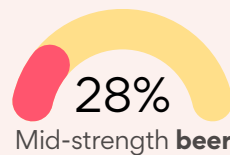
% who **would** try mid-strength versions of these products in the future



Mid-strength **beer**



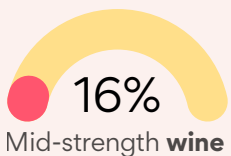
Mid-strength **cider**



Mid-strength **beer**



Mid-strength **cider**



Mid-strength **wine**



Mid-strength **spirits**



Mid-strength **wine**



Mid-strength **spirits**

When it comes to future trial, all categories are much closer, suggesting that future appeal is broader than the past. Mid-strength alcohol is no longer just an emerging trend. It's a mainstream preference. More than half of all consumers are interested in exploring these drinks as an alternative to full-strength alcohol, particularly among younger demographics.

But this isn't just about consumer interest, it's about how this interest translates into behaviour. When venues and retailers stock a diverse range of mid-strength products, they encourage more frequent visits, longer dwell time, and greater spend per visit. The more consumers see mid-strength alcohol as a viable alternative, the more they will incorporate it into their drinking habits.

# The Broad Appeal of Mid-Strength Alcohol Across Social Occasions

There is a wide range of occasions on which consumers would consider drinking mid-strength alcohol instead of full-strength options. These would include...

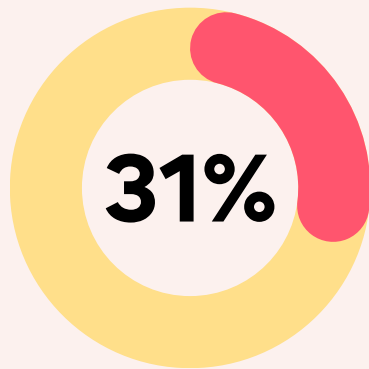


This challenges the idea that mid-strength alcohol is only for those trying to cut down on drinking. It's a choice that fits seamlessly into a variety of lifestyles. Positioning mid-strength products as a viable option for any occasion will be able to drive greater engagement and repeat business.

Mid-strength alcohol is not just an alternative for specific moments. It's a flexible solution that should be marketed across all drinking occasions and for all customer types.



# On Trade Moderation Behaviours and Tactics

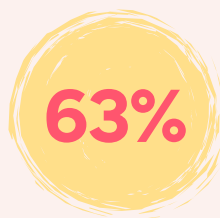


Of consumers say they would consider drinking a mid-strength alcoholic drink in a pub, bar or restaurant if they were moderating on that occasion.

31% of consumers say they would consider drinking a mid-strength alcoholic drink in a pub, bar or restaurant if they were moderating on that occasion. Compared to 65% who would choose a traditional soft drink, 34% who would choose water, and 32% who would choose an alcohol-free drink. Therefore, currently mid-strength has the least appeal out of these options with consumers. Mid-strength has a higher appeal with the 25-44 age range (36%).



The top factors that consumers are looking for when ordering a mid-strength alcohol drink in a pub, bar, or restaurant are...



Great taste



A taste that is the same as the full-strength version



An exciting/interesting flavour



Something that is refreshing

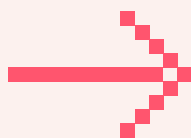


Low sugar content

Just 41% of consumers say that it's easy to find mid-strength beers that are available in the pubs, bars, and restaurants they regularly visit. It's a similar story for the choice/range, with 42% of consumers saying that the choice/range of the mid-strength beers available is very good/good. This presents a clear opportunity for operators to step in and fill the gap. If venues clearly promote their mid-strength range, they can capture the interest of customers who are moderating but still want to engage in social drinking. The key is not just offering mid-strength alcohol - but making it easy to find and order.

# The Revenue Impact for the On-Trade

Why mid-strength alcohol matters for on-trade venues



## 1 in 3

Customers have either left early or been left disappointed when visiting a pub, bar or restaurant in the last 3 months due to a poor choice of mid-strength options.

If pubs, bars and restaurants improved the **visibility** of mid-strength alcohol drinks in their venues, then...



**20%** would visit more often



**27%** would spend more per visit



**17%** would order more drinks

If pubs, bars and restaurants improved the **range/choice** of mid-strength alcohol drinks in their venues, then...



**21%** would visit more often



**28%** would spend more per visit



**16%** would order more drinks

Lack of mid-strength options isn't just a customer frustration, it's a direct revenue loss for venues. Consumers who don't find suitable options often leave early or switch to water or soft drinks, reducing overall spend.

# Going for 2 is the New Going for 1



Of consumers would rather have 2 mid-strength alcohol drinks rather than 1 full-strength drink if they were “just going to the pub for one” with a friend

A significant proportion of consumers would rather have two mid-strength drinks than one full-strength drink. This means they are more likely to stay for an extra round, boosting revenue without increasing excessive alcohol intake.

Venues that promote mid-strength alcohol as a way to enjoy ‘one more drink’ will see greater dwell time and higher order volumes.

This is also relevant for grocery retail as it suggests that customers who are looking to moderate will not be cutting down on volume when purchasing mid-strength products.



**WHY?**  
**THIS MATTERS**

The ‘one more drink’ mentality means that mid-strength alcohol is not just a moderation tool - it’s a revenue driver that venues should actively promote.



# Enhancing the Social Experience



Of consumers say that having mid-strength alcohol options available will enhance their **social experience**, when they visit pubs, bars and restaurants in the future (as high as 43% for the 25-34s)

Of consumers say that drinking mid-strength alcohol drinks on a night out would improve the **quality of their interactions** and/or allow them to stay **more present in social settings** (as high as 44% for 25-34s, and 43% for 18-24s)



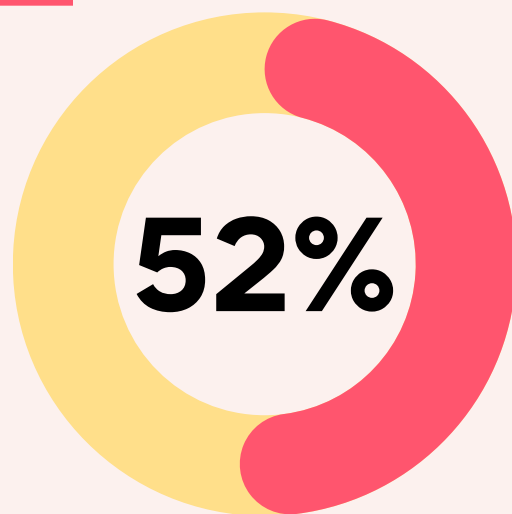
People are increasingly seeking out meaningful social interactions to counterbalance the stress of daily life, economic uncertainty, and remote work. Venues that create an environment where social connection can flourish will not only build loyalty but also drive repeat visits. Pubs, bars, and restaurants have long been central to our social culture, acting as spaces where people gather, unwind, and create lasting memories. However, as consumer behavior shifts towards moderation, the challenge is ensuring that these venues remain inclusive for those who want to enjoy a night out without overindulgence. Mid-strength alcohol plays a key role here, allowing customers to socialise over extended periods while keeping control over their consumption.

# Mid-Strength Price Perceptions

There remains a perception that the lower the alcohol content, the cheaper the product should be

52% of consumers think that mid-strength alcohol versions should be cheaper than the standard alcoholic version of the same drink.

27% think it should be the same price.



One of the biggest consumer misconceptions about mid-strength alcohol is pricing. Many believe that because mid-strength alcohol contains less alcohol, it should be cheaper. However, the reality is that mid-strength drinks often offer premium ingredients, a superior drinking experience, and added benefits such as lower calories and a reduced hangover impact.

Educating consumers on the value proposition of mid-strength alcohol is critical. Operators and retailers should highlight key benefits beyond alcohol content, such as quality, craftsmanship, and suitability for longer drinking occasions. **The collective aim should be to change customer perceptions and deliver the message that removing alcohol strength is not taking away from the customer experience, but adding to it.**

# Driving Sales in Grocery Retail

For customers looking to buy a mid-strength alcohol drink in a supermarket, these are the factors that would be most important in their decision making process...

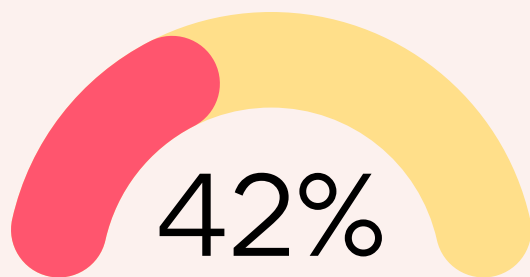


For brands and grocery retailers, these are the factors that will most likely influence a consumer into making a purchase. Getting the display right, getting the messaging right, and encouraging trial are the fundamentals for a category that is still being discovered by the average consumer. However, the opportunity is there for both parties if they can succeed in communicating these messages to those looking to moderate.



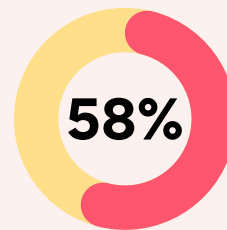
# The Retail Opportunity

Driving sales in  
supermarkets  
and off-trade

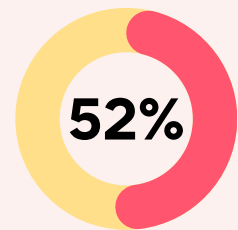


Just 42% of consumers rate the current range/choice of mid-strength beer in supermarkets as very good/good. This is the highest out of the four main categories, compared to 29% for cider, 29% for wine, and 24% for spirits. As we've seen in the on-trade, visibility is one of the biggest barriers to purchase in the off-trade. Just 43% of consumers say that it's easy to find mid-strength beer in the supermarkets they regularly visit, compared to just 32% for wine, 28% for cider and 25% for spirits.

The following types of  
information would  
encourage consumers  
to purchase mid-  
strength alcohol drinks  
in the supermarket...

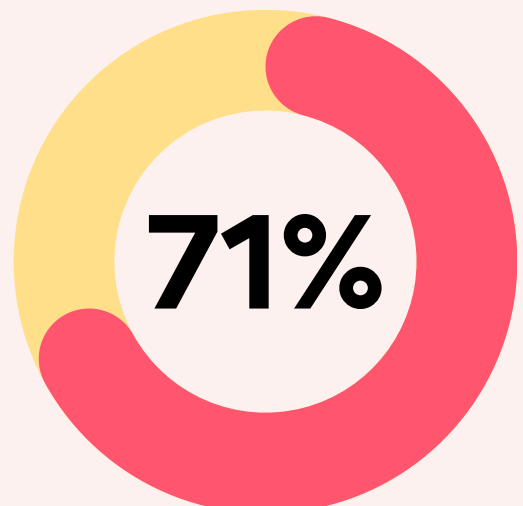


Want to know the alcohol  
units per serving and the  
comparison between their  
full-strength equivalents



Want to know the calorie  
content and the calorie  
saving compared to the full-  
strength equivalent

71% of consumers would be  
influenced to purchase by  
additional information/  
messaging on mid-strength  
alcohol drinks in the  
supermarket





# The Massive Potential for Mid-Strength Alcohol

The shift toward moderation is not a passing trend but a long-term transformation in the way consumers approach alcohol. As health and wellness continue to be key considerations, mid-strength alcohol is poised for sustained growth across both on-trade and off-trade sectors.

For businesses, this means that investing in mid-strength alcohol now will yield long-term dividends. As younger generations seek out more balanced drinking options, the demand for mid-strength will only grow. Businesses that act early, by expanding their range, improving visibility, and educating consumers, will gain a competitive edge in a market that is still developing but full of potential.

Awareness is a significant barrier to mid-strength alcohol adoption. Many consumers remain unaware of their options or unsure of the benefits. To overcome this, businesses should leverage targeted marketing campaigns, in-store promotions, and on-trade activations to build consumer familiarity and encourage trial.

Successful marketing tactics include:

- Prominent menu placement and bartender recommendations in on-trade venues
- Dedicated in-store signage and POS materials in supermarkets
- Tasting events and sample campaigns to help consumers discover the category
- Social media and influencer marketing to engage younger demographics

The right marketing approach can drive awareness, encourage trial, and establish mid-strength alcohol as a staple in consumer drinking habits.

One of the biggest advantages of mid-strength alcohol is its ability to retain customers in venues for longer periods. Consumers who moderate their alcohol intake often leave venues earlier, reducing dwell time and limiting their spend. However, when mid-strength options are available, these consumers are more likely to extend their visit, order more drinks, and increase their overall spend. The opportunity also extends beyond the on-trade. With many customers employing coasting tactics for moderation, they are likely to purchase mid-strength products in the same volume as their full-strength counterparts when engaging in social occasions at home. Mid-strength alcohol bridges the gap between traditional full-strength drinks and non-alcoholic options, keeping customers engaged for longer and increasing per-visit spend.

The mid-strength alcohol market is growing rapidly. Operators and retailers who take action now will be the leaders in this new era of balanced drinking. The time to invest in mid-strength alcohol is today.

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# Closing Statement



It's clear to Club Soda that the growth of mid-strength drinks has begun, driven by the same consumer behaviours fuelling the rise of alcohol-free options - a strong desire to moderate alcohol consumption without compromising social experiences.

This research helpfully builds on our 2024 White Paper, *The Forgotten Middle*, that highlighted the challenge for the category and confirms that 'mid-strength' is definitely a thing.

This category of drinks offers a unique proposition for both trade and consumers. It allows people to enjoy the same number of drinks, but with only half the alcohol.

However, the sector faces distinct challenges, both for consumers and the industry. This research highlights key questions that need to be addressed:

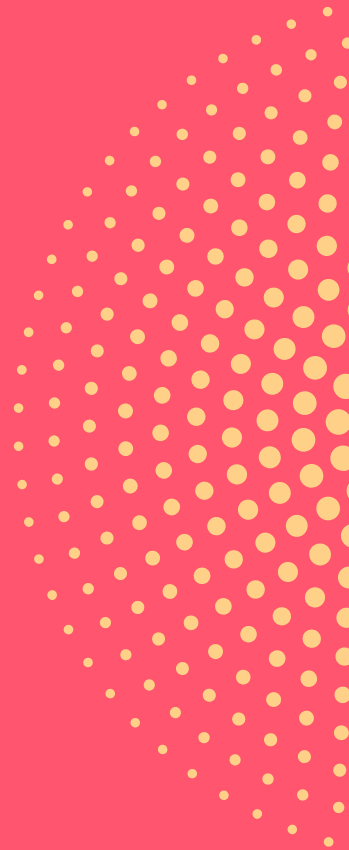
- Defining mid-strength – Does the category need an official definition, and can it be standardised globally?
- Consumer communication – How can mid-strength be easily understood when awareness of ABV and units is low, and labeling rules for “low,” “lower,” and “reduced” alcohol need updating?
- Legal and regulatory hurdles – As with alcohol-free drinks, mid-strength drinks face challenges regarding legal naming conventions (e.g. wine, gin, whisky) and classification rules such as AOP (Appellation d'Origine Protégée) and IGP (Indication Géographique Protégée) for wines.

Ultimately, moderation does not have to be a binary choice between drinking and not drinking. The goal is to encourage a more intentional drinking culture - one where we pay attention to what we drink, not just when we choose to abstain from alcohol, but also when we choose to enjoy it.

Laura Willoughby  
Club Soda Co-Founder







# THE MID STRENGTH OPPORTUNITY

UNDERSTANDING CONSUMER  
DEMAND AND TRADE POTENTIAL

Brought to you by



Club  
Soda

KAM