

A hand is shown from the right side of the frame, holding a single red cherry just above a blue, slushy cocktail in a coupe glass. The background is a warm, orange-toned wall with a green leaf visible in the top right corner.

MONIN[®]

2022-2023 UK
SUMMER TRENDS
REPORT

Published March 2023





WELCOME

It is our pleasure to welcome you to the 2022-2023 MONIN Summer Trends report. This report was created in 2022 following an in-depth market review across a broad section of the market to bring you an overview on summer trends within cocktails, coffees and soft drinks. We have since updated the stats and insights, along with making trend predictions for 2023, to help businesses plan their menus and provide inspiration across the summer period for the out-of-home. We have worked with a number of insights partners - including CGA and Allegra - combined with our own national in-market reviews, to include real insights across the coffee shop, pub, bar and restaurant sectors, from high-end to casual dining and high street chains.

CONTENTS

1. STATE OF THE NATION
2. COFFEE SHOP SECTOR
 - 2A. KEY STATISTICS
 - 2B. THE KEY PLAYERS
 - 2C. HIGHLIGHTS FROM THE HIGH STREET
 - 2D. 2022 COFFEE SHOP TRENDS
 - 2E. 2023 COFFEE SHOP MENU SUGGESTIONS
3. COCKTAIL SECTOR
 - 3A. KEY STATISTICS
 - 3B. HIGHLIGHTS FROM THE HIGH STREET & HIGH END
 - 3C. 2022 COCKTAIL TRENDS
 - 3D. 2023 COCKTAIL MENU SUGGESTIONS
4. SOURCES & RECIPE APPENDIX

MACRO TRENDS

GDP Contrary to recession predictions, the UK economy grew by 0.1% in November 2022. However the future looks uncertain with The Bank of England predicting a recession to last until mid-2024 ^{1, 2}



INFLATION The annual rate of inflation reached 11.1% in October 2022, a 41-year high, before easing to 10.7% in November and 10.5% in December 2022 ⁴



TECHNOLOGICAL ADVANCES Artificial intelligence (AI) saw a huge breakthrough with the launch of ChatGPT in November 2022, taking the world by storm. As it begins to integrate into common applications, it will significantly impact future ways of working, from business to schooling to day-to-day life ⁷

ENERGY PRICES From December 2021 to December 2022, domestic gas prices increased by 129% and domestic electricity prices by 65%, largely due to Russia's full-scale invasion of Ukraine which caused cuts in Russian supply ⁴



UNEMPLOYMENT Despite reports of the lowest unemployment since the 70s, official government figures may be misleading, with a reported 3m people not included in reports. Long-term sickness is a big factor ³

CORONAVIRUS Despite rising infections throughout winter 2022, public opinion has changed, with less than a third of adults listing Coronavirus as an "important issue facing the UK today" ⁵

COST OF LIVING CRISIS 92% of adults reported their cost of living to have increased vs a year ago (Dec22). 73% of adults were worried about rising costs of living ⁴



STRIKES Widespread strikes across multiple industries are reported to have cost the UK economy £6bn and counting, with the number of working days lost due to strikes at a 30-year high ⁶

HOSPITALITY INSIGHTS

POSITIVE OUTLOOK for pubs and bars despite the economic situation - pubs and bars with food and premium alcohol are expected to perform particularly well ⁹. 47% of hospitality leaders are confident about their prospects over the next 12 months ¹⁴

NO & LO A record number of consumers signed up to Dry January, with 15% of drinkers abstaining during the month ⁸

STAFF SHORTAGES 11% of hospitality roles were vacant in 2022, despite pay increasing by 10% ¹⁰

VENUE CLOSURES 1,611 outlets closed between September-December 2022 - the equivalent of 18 every day. 90% of these were independents, driven by high inflation, labour shortages and fragile consumer confidence ²

PREMIUMISATION Consumers are buying fewer drinks, but trading up to premium options ¹⁰. Premium lagers and craft beers are driving revenue ⁹

SPENDING HABITS are changing due to the cost of living crisis, with frequency of visits to restaurants & bars expected to decrease ¹⁰, but spend per visit will remain the same as it is seen as an "affordable luxury" ¹¹

TAKEAWAY RISE Consumers are leading busier lifestyles, with heavier workloads. This is driving a preference to eat and drink at home ⁹, with ¼ of all spending at restaurant groups spent on takeaways and deliveries ¹⁰



SUPPLY CHAIN ISSUES wreaked havoc; 81% of hospitality leaders reported reduced product lines, and 60% reported significant food and drink price inflation ¹⁰

RISING COST IMPLICATIONS Venues will either increase prices, with food and drink prices increasing by 9% in 2022 ¹⁰, or reduce portion sizes but keep prices the same (shrinkflation) ⁹. Other responses involve cutting trading times and cutting staff hours ¹³

EXPERIENCE-LED CONSUMPTION is surging in popularity, with 78% of consumers more likely to visit a venue if it offers live music, 73% likely to stay longer and 76% more likely to buy more drinks ¹²

UNFORSEEN CANCELLATIONS Adverse weather and train strikes impacted Central London sales, down 46% compared to the same period in 2019. Weather and strikes contributed to a 30% booking cancellation rate in December ⁶.

COFFEE SHOP SECTOR

KEY COFFEE SHOP STATISTICS

KEY 3 PLAYERS IN FOCUS

ARTISAN & INDEPENDENTS

HIGH STREET HIGHLIGHTS

TRENDS FROM SUMMER 2022

TREND PREDICTIONS FOR
SUMMER 2023

SUMMER SECTOR SERVE
SUGGESTIONS



KEY STATISTICS: COFFEE SHOP SECTOR

THE MARKET TODAY

The UK is **Europe's 5th largest coffee market** with an estimated **25.6m cups** of coffee served in a coffee shop every day ¹³

CUSTOMISING BEVERAGES

Syrup and whipped cream are the **most preferred ingredients** consumers add to their coffee shop beverages ¹³

FUTURE OUTLOOK

Allegra predicts the UK branded coffee shop market will surpass **10,200 outlets** by the end of 2024 ¹³

FAVOURITE HOT COFFEE FLAVOURS ¹³

- | | |
|-------------------|-------|
| 1. Caramel | 35.3% |
| 2. Vanilla | 29.4% |
| 3. Salted Caramel | 26.7% |
| 4. Hazelnut | 23.2% |
| 5. Gingerbread | 21.1% |
| 6. Cinnamon | 14.8% |
| 7. Pumpkin | 12.1% |
| 8. Milk Chocolate | 10.1% |
| 9. Toffee | 8.1% |
| 10. Coconut | 7.1% |

FAVOURITE BEVERAGE TYPES ¹³

Latte	69.3%
Cappuccino	47%
Hot Chocolate	38.7%
Flat White	36%
Americano	32.8%
Blended Iced Coffee	31.1%
Mocha	19.8%
Handmade Iced Coffee	18.5%
Bottled Water	18.3%
Blended Smoothie	14.7%

SUMMER AT THE 3 KEY PLAYERS

COSTA

Summer staples:

- Iced coffees
- Iced teas (3 flavours)
- Lemonades (2 flavours)
- Coolers (2 flavours)
- Frappes (6 flavours)



Frappe flavours:

Tropical Mango Bubble, Salted Caramel, Chocolate Fudge Brownie, Ruby Chocolate, Strawberries & Cream, and Mint Choc Chip

Limited Edition Iced Velvet Lattes: Chocolate & Oat, Vanilla & Coconut, and Caramel & Almond



RTD coffee frappes: plain coffee, caramel, and chocolate fudge brownie



The **core Frappuccino range:** Chocolate Coffee Crunch, Caramel Brownie Cream, and Classic Strawberries & Cream. They also introduced **Passionfruit Raspberry** and **Banana Split**



Iced coffee featured heavily on POS, including **iced oat/cocoa shaken espresso**



The Refreshas menu returned with **Strawberry Acai**, **Pink Coconut** and **Cool Lime**



CAFFÈ NERO

Frappe Crème Range included **vegan options:** Salted Caramel & Pistachio, Espresso & Caramel as well as regular Chocolate & Hazelnut, Strawberry & White Chocolate



Iced Flat White, Cappuccino and Latte

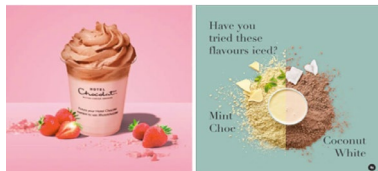
Pistachio Iced Latte



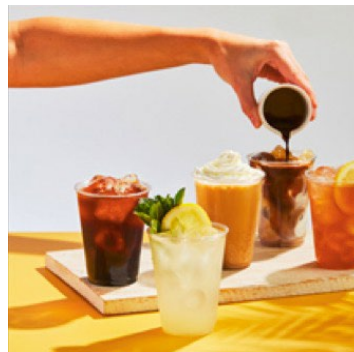
SUMMER HIGHLIGHTS FROM THE HIGH STREET

HOTEL CHOCOLAT

2 new iced chocolates: Coconut White and Mint Choc. Also Strawberry Chocolate Shake with their signature chocolate whipped cream

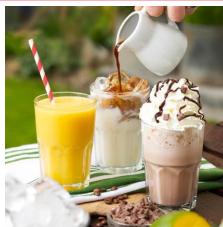


GAIL'S introduced iced chocolates



BAKERS & BARISTAS

Iced Latte, Chocolate & Coconut Iced Latte, Triple Choc Frappe, Mango, Pineapple & Passion Smoothie, and a Rhubarb & Custard Shake



PAUL BAKERY

Cloudy lemonade, cold brew, peach iced tea

LEON iced americano, iced vanilla latte, and a power house antioxidant matcha vanilla iced latte

COFFEE #1

large frappe range, with 4 flavours featured in their POS - Salted Caramel Banoffee, Chocolate, Strawberry and Coconut. They also had iced coffees and smoothies

PUCCINO'S

with Double Choc, White Choc Mocha and Strawberry White Choc Frappes. Also a pink lemonade, green tea and elderflower iced tea



PATISSERIE VALERIE

featuring a hot drink in the summer - a Macaron Mocha, as well as a Strawberry Macaron Shake



SNAPSHOTS FROM THE ARTISAN COFFEE SHOPS

CUTTER & SQUIDGE

wide selection of cake and fantasy iced drinks, including a purple mist fantasy drink; a **Lavender Iced Latte** with creamy foam



PEGGY PORSCHE

Iced Caramel Spanish Latte, served with a salted caramel macaron



ELAN CAFÉ

2 beautiful frappes - **Pistachio and Oreo**



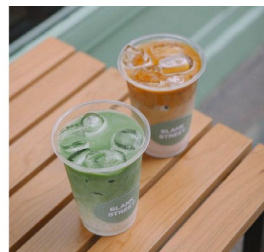
SOFT SERVE SOCIETY

Iced Candy Floss Latte



FEYA CAFÉ

with a **Lotus Latte** and **Pearl Rose Iced Latte**

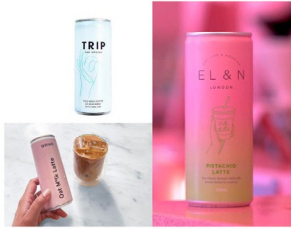


Iced Matcha and Iced Latte at **BLANK STREET** London. They also featured a **Strawberry Iced Latte** on the menu

LOOKING BACK: SUMMER 2022 TRENDS



ICED COFFEE BOOM



RTD COFFEES TOOK OFF with many brands launching their own, including Elan Café's canned Pistachio Latte, Grind's Oat Milk Latte, and TRIP's CBD-infused coffees

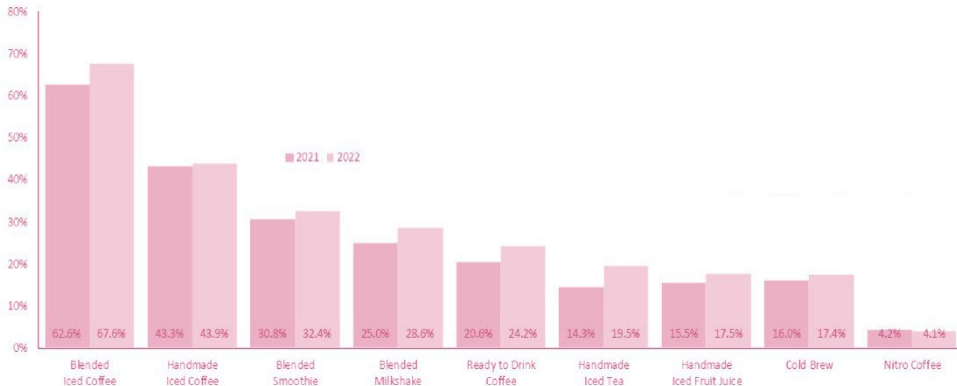
MORE INNOVATIVE FLAVOURS are appearing on the market, such as this **Strawberries & Cream Iced Latte** from Blank Street. Pistachio and Candy Floss are popular, and we expect to see co-branded confectionary flavours launching soon too

WHAT DO THE INSIGHTS SAY?

Iced coffees dominated UK coffee shop menus again this summer, with iced lattes the clear front-runner with **72.6%** (69.7% in 2021) favouring this serve vs 28.6% for an iced cappuccino and 26.7% for an iced mocha. Iced Mochas are gaining popularity, replacing Americano in 3rd place vs 2021 ¹⁶

DEMOGRAPHIC SPLIT

The popularity of iced coffee varies vastly by demographic, with **7.4%** of under 35s drinking iced coffee on a daily basis, vs **1.1%** of over 55s. Only 16.6% of under 35s 'never' drink iced coffee, vs 59.8% of over 55s ¹³



FLAVOUR AND DRINKS TRENDS

From a recent **KANTAR CONCEPT DRINK SURVEY** in the UK, consumers ranked their preferences from a selection of trendy, non-classic hot drinks. The **RAF (A.K.A Raff)** coffee came out on top, based purely on the indulgent description of the drink. **Golden Turmeric Latte** came in second place, ahead of matcha in 8th place. We found it interesting to see hot lemonade in 3rd too



CO-BRANDING continues to play an important role in coffee shop campaigns, with **Oreo** and **Lotus Biscoff** dominating, particularly in milkshake and frappe drinks.

UK'S FAVOURITE MILKSHAKE FLAVOURS

Strawberry (33.5%), vanilla (29.1%), and banana (26.6%) took the top 3 spots, followed by chocolate, salted caramel, cookies & cream, caramel, peanut butter, mango, and white chocolate



TOTAL Rang 1
 Total sélection (Rang 1+2+3)

RAF coffee	20%	47%
Golden latte	15%	38%
Hot lemonade	14%	42%
Mulled wine	12%	35%
Chai latte	11%	33%
Hot cocktails	11%	34%
Vegetarian/vegan milk	9%	25%
Matcha latte	7%	24%
Glögg	2%	21%

Base : 401

% Total sélection



TROPICAL FLAVOURS dominated the UK high street in 2022. Coffee shops embraced flavours such as watermelon, mango, pineapple, passionfruit, and banana. Dragon fruit and ube also get a special mention, appearing on menus in several venues



MUFFIN BREAK'S confectionary-themed shakes - Crunchie, Lotus Biscoff, Aero Mint, Oreo, and Peanut Butter & Chocolate



MYSTERY FLAVOUR CAMPAIGNS

Caffe Nero ran a promotion with The Batman Movie with 2 mystery hot chocolate flavours (Toffee Popcorn and Cola), and both Cadbury's and Coca-Cola had several "guess the flavour" campaigns

FOR A LIMITED TIME ONLY

SEASONAL CAMPAIGNS EXPANDING WITH NEW THEMES

In the past, seasonal campaigns only used to feature summer and festive offers, however, in recent years limited time offerings (LTOs) have featured more and more. In 2022, many brands embraced The Queen's Platinum Jubilee. We also saw many Easter drinks, Valentine's promotions, St Patrick's Day drinks and many brands showing support for Ukraine



CREAMS

Launched platinum puddings with 3 thick shakes; White Kinder Bueno, Smarties & Aero Mint Bubbles

PLANET ORGANIC

offered blue and yellow drinks in support of Ukraine, with all profits from those drinks going to charity



DUNKIN DONUTS

Platinum Jubilee Strawberries & Cream LTO



GRANDPA GREENES served decadent hot chocolates with Easter eggs, whipped cream and mini eggs

COSTA co-branded with KitKat for Easter. Each of their KitKat flavoured hot drinks were served with a mini KitKat bunny

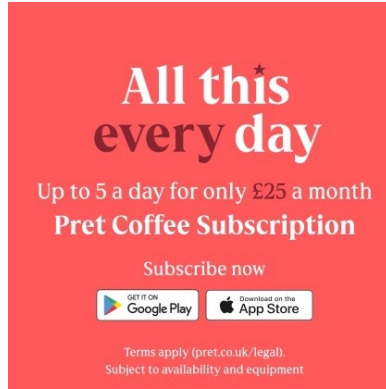


M&S CAFÉ had a limited edition Easter-themed Hot Cross Bun Latte



SUBSCRIPTIONS, LOYALTY SCHEMES, REWARDS AND TECH

A LOT OF COMPETITION ON THE HIGH STREET is causing coffee shop brands to rely increasingly on enticing rewards, offers, loyalty schemes, and PR to draw customers in. We expect brands to get increasingly creative with their approach to this, and we expect to see further changes in the way they market to the younger generations.



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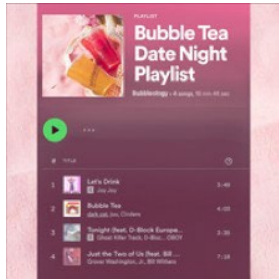
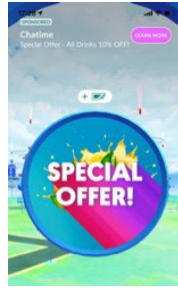
Terms apply (pret.co.uk/legal). Subject to availability and equipment

PRET subscription - 5 coffees every day for £25 per month



LEON gave out free iced coffees with purchases of their chick'n wraps

CHATIME has over 2,500 outlets in 38 countries, and over 30 locations in the UK alone. They partnered with the hugely popular AR mobile game **Pokemon Go**, with their stores acting as Pokemon Go hubs, with special offers for Chatime drinks within the game



BUBBLEOLOGY joined the tech trend, offering bespoke themed Spotify playlists



SOHO COFFEE fought the tech revolution with £1.50 iced coffees when ordering in-store



PAUL BAKERY with £1 off **Macaron Frappes** when downloading their app, and a limited time BOGOF promotion for app users



MORRISONS offered shoppers free refills across all of their iced drinks in cafes on the hottest day of the year, gaining a positive response from customers on social media

THE BUBBLE TEA BOOM

Whilst growth in the UK bubble tea market has been strong over the last few years, as a stroll through any major UK city centre could tell you, the market looks set to become even stronger over the next few years



According to a market study, the UK bubble tea market is set to grow at 8.5% CAGR over the next 10 years. This represents a 50% growth in the size of the market over the next 5 years and a 225% growth over the next decade.¹⁷



AHMED TEA
Rainbows & Unicorns
Bubble Tea



COSTA launched their Tropical Mango Bubble Frappe ahead of their competitors, which proved extremely popular by all accounts

CHERRY'S BOBA SHOP in Manchester is said to boast the widest range of bubble tea flavours in the UK, with over 10,000 drink combinations available



BUBBLOLOGY
broke into the cocktail market with a limited promotion featuring Malibu, Kahlua, and Absolut



HOTEL CHOCOLAT
Mango & Passion
Sundae containing
boba pearls

INSIGHT-LED MENU SUGGESTIONS FOR SUMMER 2023



COFFEE SHOP TREND 1

ICED & BLENDED COFFEES

THE INSIGHTS

Blended iced coffees are the #1 favourite iced beverage and saw the largest annual increase of all beverage types, up

11.1% vs 2022 ¹⁶

Handmade iced coffees are the #2 favoured iced, particularly in the under 35 age demographic ¹⁶

DINE IN & TAKEAWAY

Both blended and handmade iced coffees are popular for both dine-in and takeaway, with more consumers ordering takeaway for both drinks ¹⁶

FAVOURITE FLAVOURS

1. Caramel
2. Salted Caramel
3. Vanilla
4. Hazelnut
5. Milk Chocolate

TREND-LED RECIPE INSPIRATION

THE MENU STAPLE

Caramel Iced Latte

AN INDULGENT TREAT

Banoffee Coffee Frappe (blended coffee)

A SUMMER LTO

Strawberry Iced Cold Brew

A HEALTHIER ALTERNATIVE

Oat Milk Sugar-Free Salted Caramel Latte

TOP TIP Offering the option of customisable flavour, milk choice and beverage size is key to happy customers!

RECIPES for the above drinks can be found in the appendix after the sources

COFFEE SHOP TREND 2

BUBBLE TEA

THE INSIGHTS

The UK holds a major share in the European bubble tea market, forecasted to grow

8.5% YOY until 2032 ²¹

CUSTOMISATION IS KEY

1. Flavour
2. Sweetness
3. Milk type
4. Taste profile

TREND-LED RECIPE INSPIRATION

COCKTAIL-INSPIRED MILK TEA

Piña Colada Milk Tea

EXOTIC-INSPIRED BOBA TEA

Peach & Lemon Bubble Tea

CLASSIC TAPIOCA TEA

Brown Sugar Milk Tea

TOP TIP Offering a sustainable packaging option would help to convert eco-driven consumers

RECIPES for the above drinks can be found in the appendix after the sources

THE INSIGHTS

46% of consumers said they would like to try **new beverages** in coffee shops ¹³

Consumers listed '**bolder flavours**' as the #5 reason to buy an iced beverage in a coffee shop, particularly for men ¹³

FLAVOUR TRENDS TO WATCH

1. Yuzu
2. 'Swicy' (Sweet & Spicy)
3. Exotic flavours e.g. Jabuticaba
4. Grapefruit
5. 'Swalty' (Sweet & Salty)

TREND-LED RECIPE INSPIRATION

EXOTIC LEMONADE

Jabuticaba Lemonade

TROPICAL ICED TEA

Rooibos & Passionfruit Iced Tea

FOR THE ADVENTUROUS CONSUMER

Spicy Mango Chocolate Milkshake

RECIPES for the above drinks can be found in the appendix after the sources

COCKTAIL SECTOR

KEY STATISTICS

HIGHLIGHTS FROM THE HIGH STREET

HIGHLIGHTS FROM THE HIGH END

FLAVOUR AND DRINK TRENDS

NO AND LOW



KEY COCKTAIL STATS

TOP 10 MAINSTREAM COCKTAILS BASED ON SHARE OF SERVE

Classic cocktail serves are starting to lose market share as consumers' desire for experimentation increases resulting in Daiquiris, flavoured Martinis and Spritzes growing in the OOH ¹⁹



"AT WHAT TIME OF YEAR DO YOU DRINK COCKTAILS OUT?"



SUMMER CONTINUES TO REPRESENT A KEY COCKTAIL PERIOD ¹⁹



31% OF GB CONSUMERS TYPICALLY DRINK COCKTAILS IN THE ON PREMISE (+11pp vs 2021).²³

COCKTAIL FLAVOUR PREFERENCES (INDEXED VS 2021)



AT A GLANCE:

67%

of consumers are very likely to pay more for a better quality cocktail

£664m

is the total value of cocktails in GB

Flavour & Ingredients

are top factors when choosing a cocktail

HIGHLIGHTS FROM THE HIGH STREET



MILLER AND CARTER offered a complimentary Blood Orange Spritz when you downloaded the app. They also had a Grey Goose Martini Flight Board



TURTLE BAY Jamaican Wake
Up with rum, vanilla, coconut milk and cold brew coffee



PREZZO had a range of summer cocktails including a **Blackberry Negroni**, **Lemon & Elderflower Spritz** and a **Blood Orange Margarita**



LAS IGUANAS spring/summer 2022 featured a **Mezcal Iced Coffee**, **Passion Fruit Mojito Royale**, a **Cuban Negroni Spritz** and **popping boba cocktails**; **Passion Fruit Colada** and **Ocean Colada**

ED'S DINER

Ed's featured their hard shakes on menus across the concept with the Mudslide or the EdSpresso Martini



BE AT ONE

Four LTO cocktails representing four different countries with a promotion to buy the cocktail and scan the QR code for the chance to win a trip to the country



HIGHLIGHTS FROM THE HIGH END



HACHA, LONDON

Flight board showcasing 3 generations of Margaritas:
-1930s Classic Margarita
-1970s Frozen Margarita
-2020s Mirror Margarita



MURDER INC, SOHO

Companero Cobbler -
rum, french melon, rose,
citrus, cucumber
& almond



THE PINEAPPLE CLUB, BIRMINGHAM

a five-
strong cocktail menu for
the Commonwealth
Games, each cocktail
representing a country



FILTHY XIII, BRISTOL

Rose Gin Ramos



CALLOOH CHELSEA X CHELSEA FLOWER

SHOW Martin Millers Gin,
Sorrel, amaretto,
soda water



LAKI KANE, ISLINGTON

Zero-waste cocktail with
chocolate wine and
raspberry



ORIOLE, LONDON

Appleton Rum, Trois
Rivieres, Feijoa Fruit
Liqueur, Sauvignon Blanc



ARTESIAN, LONDON

Beach Bar Paradise
with edible coral
garnish



MILK THISTLE, BRISTOL

Hendrick's Neptunia, Yuzu
Sake, Elderflower &
Grapefruit



SWIFT, SOHO

Elderflower Spritz and
Sgroppino

LOOKING BACK: SUMMER 2022 COCKTAIL TRENDS

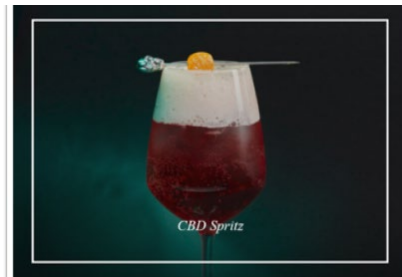


2022 FLAVOUR AND DRINKS TRENDS

SUMMER 2022 SAW THE RESURGENCE OF DISCO- INSPIRED DRINKS, heavily featuring blue Curaçao as an ingredient, across both casual dining and high-end bars alike

MEXICAN-INSPIRED DRINKS such as the Horchata, Paloma and Picante have also played a key role on menus in 2022.

CBD Functionality continues to be at the forefront of consumers' minds, with more bars adding **CBD** as an ingredient



THE ALCHEMIST
Featured a CBD Spritz containing a CBD gummy garnish



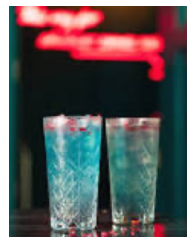
LAS IGUANAS introduced a **Vegan Horchata** for summer containing Malibu, Oatly, cinnamon & nutmeg syrups, and popcorn



SOHO HOUSE's world-renowned Picante, which is appearing more and more frequently on menus across the market



GBK Launched a CBD menu across limited sites, including a **CBD Mojito**



SCHOFIELD'S BAR - Blue Train
DIRTY MARTINI - Coco Colada
BE AT ONE - Raspberry Beret
THREE SHEETS - Sgroppino

Patrón Tequila sponsored **PALOMA WEEK 2022** at **SATAN'S WHISKERS**



CABANA RESTAURANTS launched a Paloma Picante across their menus



Paloma Picante 10.5
the thinking person's tequila cocktail.

Patrón Silver tequila,
Two Keys Grapefruit Soda,
Two Keys Picante Syrup, salt rim

SLUSHIES & SPRITZES

TAKEAWAY DRINK EQUIPMENT

During the Covid pandemic, we saw many venues invest in equipment utilised for takeaway drinks (tap dispense systems, slushy machines etc.). Now the pandemic is in the rear-view mirror, those venues are still incorporating that equipment for in-house drinks which in turn has encouraged other venues to do the same. **Spritzes** still reign king with the likes of Aperol investing heavily in venue stock/POS/cash retros, but we're seeing more venues do their own interesting spins on the classic spritz. We're also seeing **retro-inspired serves**, with the **Twister** lolly a favourite inspiration.

18% of Spritz cocktail drinkers are willing to pay more for a premium drink

Spritz are a huge opportunity in summer. Spritz now account for 1 in every 20 cocktails served in the on trade with this figure increasing during summer



FAT HIPPO MANCHESTER

Aperol Spritz Chicken Burger, made using Aperol hot honey butter



HMSS, BRISTOL

The Twister - pear vodka, kiwi and strawberry, lime sherbet, Martini bitter with a grapefruit ice lolly



MURDER INC, LONDON

Afternoon Par-Tea - chamomile vodka, marmalade sherbet, virgin cane honey, citrus, Moët Champagne



PREZZO launched a signature 'Venetian Spritz' featuring 'Select' aperitivo and cloudy lemonade



SATANS WHISKERS, LONDON

Frozen Irish Coffee



JAM JAR, PAISLEY
co-branded frozen Twister Daiquiri

CLARIFIED COCKTAILS

CLARIFIED COCKTAILS were widespread; from milk punches to acid blends and fat washes. Venues were ditching fresh citrus juice (and the waste they produce) for the likes of **clear acid blends** like Supasawa and Citric Blend. Many bars offered **clarified twists on classics**, such as clarified Margaritas, Long Island Ice Teas, Grasshoppers, Piña Coladas and Highballs.

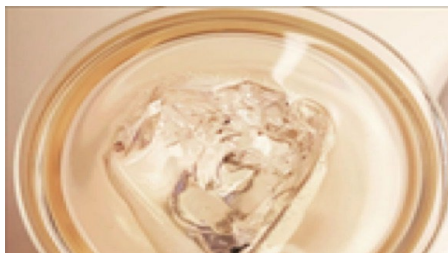
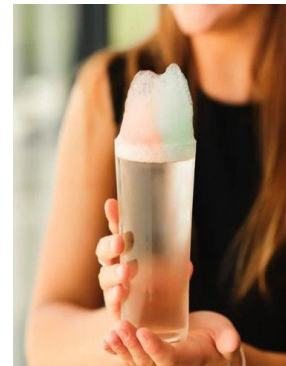


THE IVY ASIA, LONDON

Thai Green Curry - tequila, lime, ginger, lemongrass, coconut water, green Tabasco and coconut foam

THE UGLY BUTTERFLY, CORNWALL

"Kittens in Fashioned" - nasturtium-infused white rum, elderflower liqueur, rose vermouth, Paragon White Penja cordial, citric blend, saline, mint stem soda, mint and hibiscus air



SWIFT, SHOREDITCH

Featured a Rhubarb & Custard Milk Punch



THE ALCHEMIST

Featured "The Invisible Negroni" which comprised of Campari Air, Bulldog Gin and Martini Ambratto



SPEAK IN CODE, MANCHESTER

Their "Untitled 2" was a modern interpretation of a June Bug

EXTRAORDINARY SERVES

WOW FACTOR - more and more venues are looking for the “wow factor” when it comes to visuals for their beverages. Whether it’s a Tiki mug, dry ice, a Fabergé egg, or even a drink served out of a mini safe, venues are going the extra mile to encourage consumers to post their drinks on their **social media platforms**

43% of consumers

post a photo of their cocktail on social media ‘every time’ or ‘almost every time’¹⁹



NIGHTJAR, LONDON

With an extensive ingredient list and impressive visual, it featured Volcan de mi Tierra Blanco Tequila, Amores Verde Momento Mezcal, passion berry tincture, milk oolong & Osmanthus mead wine infusion, grapefruit juice, lime juice and agave syrup



THE COCKTAIL TRADING CO

Served in a Fabergé egg, this Instagrammable serve included **Flawless Eminente** Cuban rum, Montenegro Amaro, praline bitters and pickled pear

MOTHER MERCY, NEWCASTLE

Maximised on the growing experimental trend with a mystery cocktail game offering an off-menu cocktail



HOMEBOY, ISLINGTON

Their **Dog House Punch** was served in an impressive vessel, and featured Bacardi 8yr, Hennessy VS, peach liqueur, peach tea and lemon soda



NO AND LOW

70%

OF ALCOHOL DRINKERS TRIED TO CUT DOWN ON ALCOHOL IN JANUARY.

46%

OF ALCOHOL DRINKERS HAVE TRIED NO OR LOW ALTERNATIVES.

Research by Diageo suggests the **alcohol-free market will grow 17%** over the **next two years**, to a total value of **£273 million**. **Millennials and Zoomers** are the generations **most likely to drink no & low alcohol drinks** in the traditional boozy setting of being out with friends at parties ²⁰



DE SOI

Created by **Katy Perry**, De Soi is a non-alcoholic aperitif containing Reishi mushroom, ashwagandha and l-theanine



TGI FRIDAY'S

Even the high street chains are launching non-alcoholic cocktails, such as TGI's with their **Ginless Garden**, featuring Seedlip Garden 108, rhubarb tonic, citrus and cucumber.



THE BOTANIST

Featured a non-alcoholic **Cherry Blossom** created with Everleaf non-alcoholic aperitif



THE IVY CHELSEA

With a non-alcoholic **Peach & Elderflower Iced Tea**

INSIGHT-LED MENU SUGGESTIONS FOR SUMMER 2023



COCKTAIL TREND 1

TEQUILA & MEXICAN-INSPIRED

THE INSIGHTS

Tequila was the most-increased alcoholic beverage to order OOH, up **7%** vs Q1 2021 ¹⁹

ROOM FOR GROWTH

Currently, tequila doesn't feature in any of the top 10 mainstream cocktails ¹⁹, but we'll be watching out for new data as we expect Margaritas to move up the ranks

RETAIL-DRIVEN

Sales of tequila almost doubled in the two years 2020-2022 ²²

TREND-LED RECIPE INSPIRATION

A MENU MUST-HAVE

Paloma

A SUMMERY TWIST

Timmy's Margarita

ONE FOR THE BOLD

Thai Green Picante

RECIPES for the above drinks can be found in the appendix after the sources

COCKTAIL TREND 2

SLUSHIES

THE INSIGHTS

SEASONALITY is a key decision maker, with **43%**

of consumers changing their cocktail order depending on the time of year ⁶⁵

REFRESHMENT

Is the #6 reason to order a cocktail out, with **28%** making their choice for this reason ¹⁹

FLAVOUR PROFILES

'Berry' is the #1 flavour for cocktails, which lends itself to slushy serves ¹⁹

TREND-LED RECIPE INSPIRATION

VODKA-BASED

Frozen Cosmo Slushy

RUM-BASED

Frozen Pina Colada

TEQUILA-BASED

Frozen Strawberry Margarita

RECIPES for the above drinks can be found in the appendix after the sources

COCKTAIL TREND 3 CLARIFICATION

THE INSIGHTS

INSTAGRAMMABLE cocktails are a key driver for venue coverage on social media, with **43%** of consumers posting a photo of their cocktail on social media 'every time' or 'almost every time';¹⁹

ELEVATED COCKTAILS
With at-home consumption here to stay, venues should offer serves that are hard to replicate at home in order to differentiate

SPONTANEITY - **61%** of consumers make their cocktail decision at the bar, where consumers can be influenced by staff recommendations¹⁹

TREND-LED RECIPE INSPIRATION

MILK PUNCH
Penicillin Milk Punch

BATCH-MADE
Clear Daiquiri

THE CHEAT'S METHOD
Crystal Cuba Libre

RECIPES for the above drinks can be found in the appendix after the sources

THANK YOU FOR READING

To learn more about any of the trends mentioned in this report, please find a link to our 2023 Summer Drink Trends Webinar [here](#).

If you'd like to know more about any of the products mentioned in this report, please email us on moninuk@monin.com

If you are interested in visiting our UK studio for a menu development session, please enquire for more information on moninuk@monin.com

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APPENDIX

ICED & BLENDED COFFEES

CARAMEL ICED LATTE

INGREDIENTS

20ml MONIN Caramel syrup
1 double espresso OR 30 ml MONIN Cold Brew concentrate
120 ml milk of choice
12 oz glass of ice

METHOD

Add milk and MONIN syrup into cup of choice with ice and stir. Pour over espresso or cold brew to create a layered effect

BANOFFEE BLENDED ICED COFFEE

INGREDIENTS

10 ml MONIN Caramel syrup, to coat the inside of the glass
30 ml Le Fruit de MONIN Banana fruit mix
1 scoop MONIN Vanilla Frappe powder
1 single espresso OR 20 ml MONIN Cold Brew concentrate
100 ml milk
12 oz cup of ice

METHOD

Combine everything in a blender with a 12 oz cup of ice and blend on high power. Pour into a cup or milkshake glass, top with whipped cream and a dusting of chocolate powder, and serve

STRAWBERRY ICED COLD BREW

INGREDIENTS

20 ml MONIN Strawberry syrup
30 ml MONIN Cold Brew concentrate
120 ml water
12 oz glass of ice

METHOD

Add MONIN syrup and cold brew into your glass of choice with ice and water and stir

SUGAR-FREE SALTED CARAMEL OAT MILK LATTE

INGREDIENTS

20 ml MONIN Sugar-free Salted Caramel syrup
1 double espresso
180 ml oat milk

METHOD

Extract a double espresso into a latte glass and add in the MONIN syrup. Steam the oat milk and pour into the glass. Optionally, garnish with non-dairy whipped cream

APPENDIX

BUBBLE TEA

PIÑA COLADA MILK TEA

INGREDIENTS

30 ml MONIN White Tea concentrate

20 ml MONIN Piña Colada syrup

150 ml coconut milk

1 heaped tablespoon tapioca pearls

METHOD

Place the tapioca pearls in a glass and add all liquids, add ice and churn lightly to combine the liquids together. Serve with a wide straw

PEACH & LEMON BUBBLE TEA

INGREDIENTS

30 ml Le Fruit de MONIN Peach fruit mix

30 ml MONIN Lemon Tea concentrate

150 ml chilled water

1 heaped tablespoon peach boba pearls

METHOD

Place the boba pearls into a glass and add all liquids, add ice and churn lightly to combine the liquids together. Serve with a wide straw

BROWN SUGAR MILK TEA

INGREDIENTS

30 ml MONIN White Tea concentrate

20 ml MONIN Brown Sugar syrup

150 ml milk

1 heaped tablespoon tapioca pearls

METHOD

Place the tapioca pearls into a glass and add all liquids, add ice and churn lightly to combine the liquids together. Serve with a wide straw

APPENDIX

BOLD, EXOTIC FLAVOURS

JABUTICABA LEMONADE

INGREDIENTS

15 ml Le Fruit de MONIN Jabuticaba fruit mix
30 ml MONIN Cloudy Lemonade concentrate
150 ml chilled water

METHOD

Add all liquids to a highball glass filled with ice and churn lightly to combine

ROOIBOS & PASSIONFRUIT ICED TEA

INGREDIENTS

10 ml MONIN Passion Fruit syrup
30 ml MONIN Rooibos concentrate
150 ml chilled water

METHOD

Add all liquids to a highball glass filled with ice and churn lightly to combine

SPICY MANGO ICED CHOCOLATE

INGREDIENTS

20 ml MONIN Spicy Mango syrup
1 scoop MONIN Chocolate Frappe powder
175 ml milk

METHOD

In a steaming jug, steam the frappe powder with 75ml of milk to create a thick chocolate sauce. Add the ice to a highball glass and pour in the syrup and 100ml of milk. Stir to combine, then drizzle over the liquid chocolate. Stir once and serve with a straw.

APPENDIX

TEQUILA & MEXICAN-INSPIRED

PALOMA

INGREDIENTS

20 ml MONIN Pink Grapefruit syrup
20 ml MONIN Cloudy Lemonade concentrate
50 ml tequila
soda water, to top

METHOD

Add all liquids to a highball glass filled with ice and churn lightly to combine

TIMMY'S MARGARITA

INGREDIENTS

10 ml MONIN Agave syrup
20 ml Paragon Timur Berry Cordial
10 ml Citric Blend or Supasawa
50 ml tequila

METHOD

Add all ingredients to a stirring glass filled with ice and stir thoroughly for 30 seconds. Strain into a chilled cocktail glass or coupette and garnish with lime zest

THAI GREEN PICANTE

INGREDIENTS

20 ml MONIN Lemongrass syrup
50 ml Tequila
20 ml lime juice
50 ml coconut water
2 sprigs fresh coriander
half a chopped green chilli
3-6 dashes green Tabasco
pinch of salt

METHOD

Add all ingredients to a shaker, fill with ice and shake thoroughly. Strain into a chilled highball or cocktail glass with ice and garnish with chilli, coriander and lemongrass

APPENDIX

SLUSHIES

FROZEN PIÑA COLADA

INGREDIENTS

20 ml Le Fruit de MONIN Pineapple fruit mix
20 ml MONIN Lime Rantcho concentrate
1 scoop MONIN Non-Dairy Frappe powder
50 ml white rum
120 ml coconut milk
12 oz cup of ice

METHOD

Combine everything in a blender with the ice and blend on high power. Pour into a cocktail glass, add some pineapple leaves to garnish, and serve.

FROZEN COSMO

INGREDIENTS

20 ml MONIN Triple Sec syrup
20 ml MONIN Lime Rantcho concentrate
1 scoop MONIN Non-Dairy Frappe powder
50 ml citron vodka
120 ml cranberry juice
12 oz cup of ice

METHOD

Combine everything in a blender with the ice and blend on high power. Pour into a coupe glass, add a flamed orange zest to garnish, and serve

FROZEN STRAWBERRY MARGARITA

INGREDIENTS

30 ml Le Fruit de MONIN Strawberry fruit mix
30 ml MONIN Lime Rantcho concentrate
1 scoop MONIN Non-Dairy Frappe powder
50 ml tequila
12 oz cup of ice

METHOD

Combine everything in a blender with the ice and blend on high power. Pour into a cup or glass, add some strawberries and a mint sprig to garnish, and serve

APPENDIX

CLARIFIED

PENICILLIN MILK PUNCH

INGREDIENTS

20 ml MONIN Honey syrup
10 ml MONIN Ginger syrup
40 ml Scotch whisky
10 ml Islay Scotch
50 ml whole or semi-skimmed milk
35 ml lemon juice

METHOD

Combine all ingredients in a mixing jug, making sure the lemon juice is last. Churn the mixture thoroughly to combine and leave to rest in the fridge for 2-3 hours. Then, pass through a series of coffee filters until the liquid runs clear. Once the mixture is fully strained, add 100ml to a rocks glass with block ice and serve

CLEAR DAIQUIRI

INGREDIENTS

20 ml MONIN Pure Cane Sugar syrup
20 ml Citric Blend or Supasawa
50 ml white rum

METHOD

Add all ingredients to a stirring glass filled with ice and stir thoroughly. Strain into a chilled cocktail glass or coupette and garnish with lime zest

CRYSTAL CUBA LIBRE

INGREDIENTS

10 ml MONIN Vanilla syrup
10 ml MONIN Triple Sec syrup
30 ml Velvet Falernum Liqueur
25 ml white rum
25 ml Citric Blend or Supasawa
8 drops Ms. Better's Kola Bitters
soda water, to top

METHOD

Build all liquids into a chilled highball glass filled with ice and top with soda water, churn lightly to combine.

You can batch this serve by scaling up all ingredients and bottling - excluding the soda. For each serve, pour 100 ml of the liquid into a chilled highball glass filled with ice and top with soda water



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