



# State of the Adult Beverage Menu

PREVIEW REPORT

# METHODOLOGY

## IN THIS REPORT

This preview of Datassential's *State of the Adult Beverage Menu* report provides an overview of how beer, wine, cocktails, and other alcoholic beverage menus are expanding.

As menus grow, so do opportunities for innovation—whether through unique flavor profiles, premium ingredients, or creative presentation. Dive in for major beverage trends, the drivers behind them, and a breakdown by segment.

## METHODOLOGY

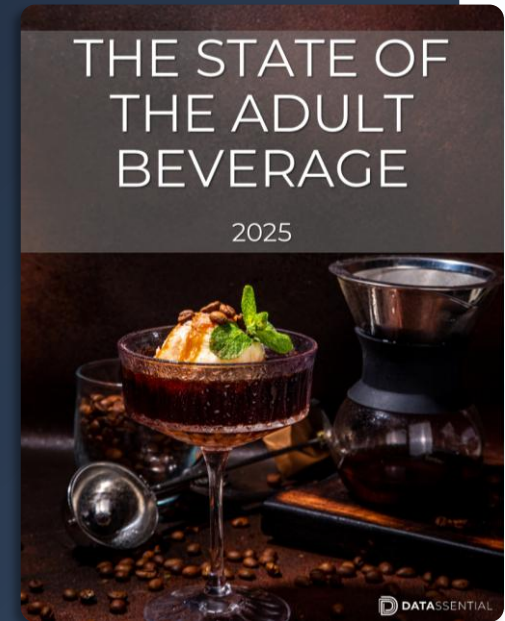
- This report utilizes data from our Menu Trends database, pulling in millions of menu items from around the globe, showing their trajectory, offering a glimpse into how they'll perform in the future.
- The focus in the pages ahead is on two key measures: Items Per Menu (# of items/# of menus) and Penetration (% of menus offering.)

## ABOUT DATASSENTIAL'S BEVERAGE INSIGHTS

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- Large scale reports on drinking habits and trends and like *Future of Drink*
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# State Of The Adult Beverage Menu 2025

01

Adult beverage menus didn't experience the large contraction other menu parts felt during the COVID-19 pandemic. After a slight contraction in 2021, overall, adult beverage menus have continued to grow.

02

Menus don't show massive growth, but many interesting trends are happening across beverage types. The category lends itself to trying new things, meaning that menus rotate frequently. There may be an opportunity to highlight what's new on menus to entice those who want to dabble in something different. Discounts on new beverages might encourage people to try things outside their "go-to drink."

03

Adult beverages are key at fine dining, and menus within that segment continue to experience growth. The number of options offered on cocktail and wine menus has grown strongly over the past year, while the number of beer offerings is holding steady. Fine dining is using cocktails to showcase its prowess in ingredient pairings.

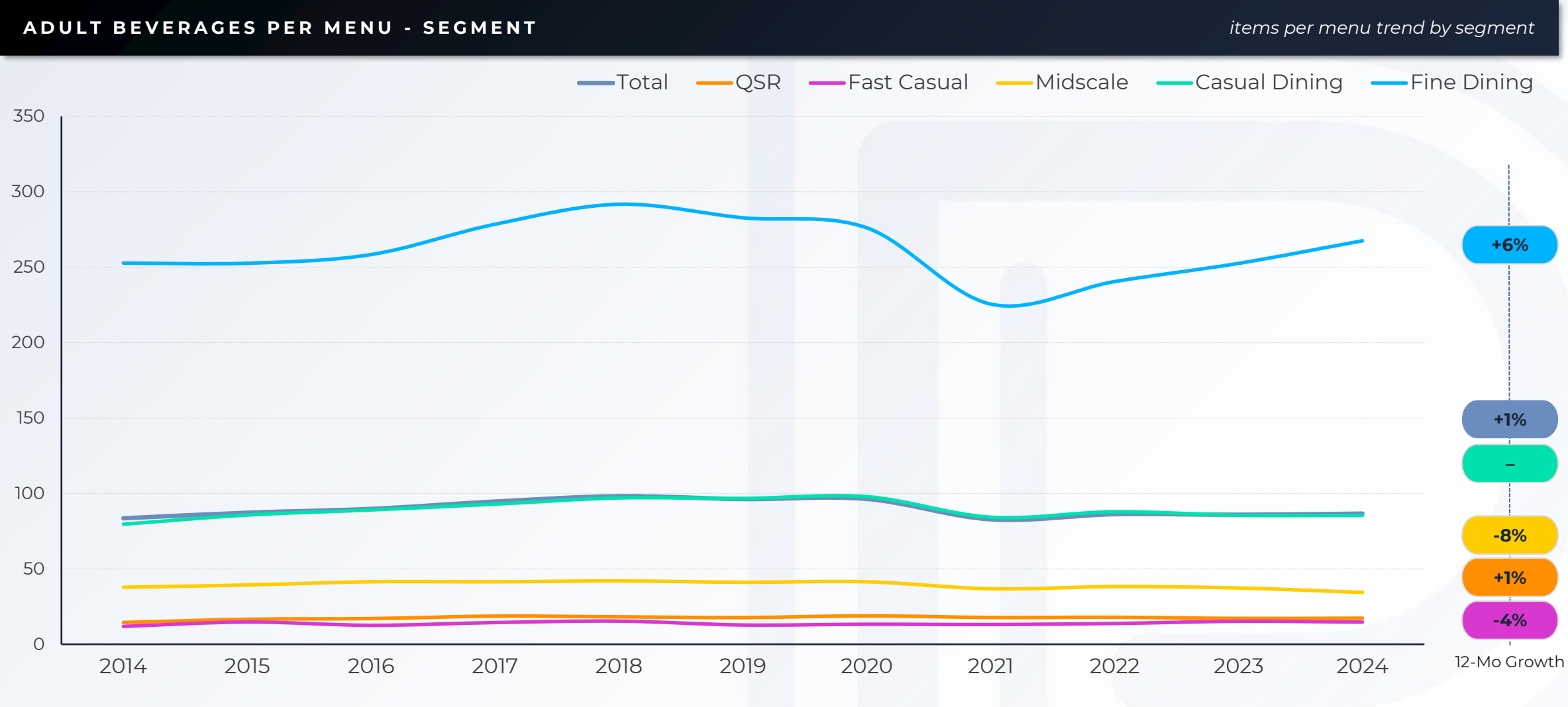
04

There's much discussion of other adult beverages (seltzers, ciders, kombuchas, teas, lemonade, and more), but these tend to be offered as one-offs on menus rather than fully developed beverage categories.



# Fine dining adult beverage menus are by far the largest among restaurant segments and continue to trend towards pre-COVID levels over the past year.

At most other segments (excluding midscale) the number of adult beverages is holding steady.



# Fruity flavors are experiencing growth across categories such as punches, mango, yuzu, cranberry, and more.

No and low options continue to trend.

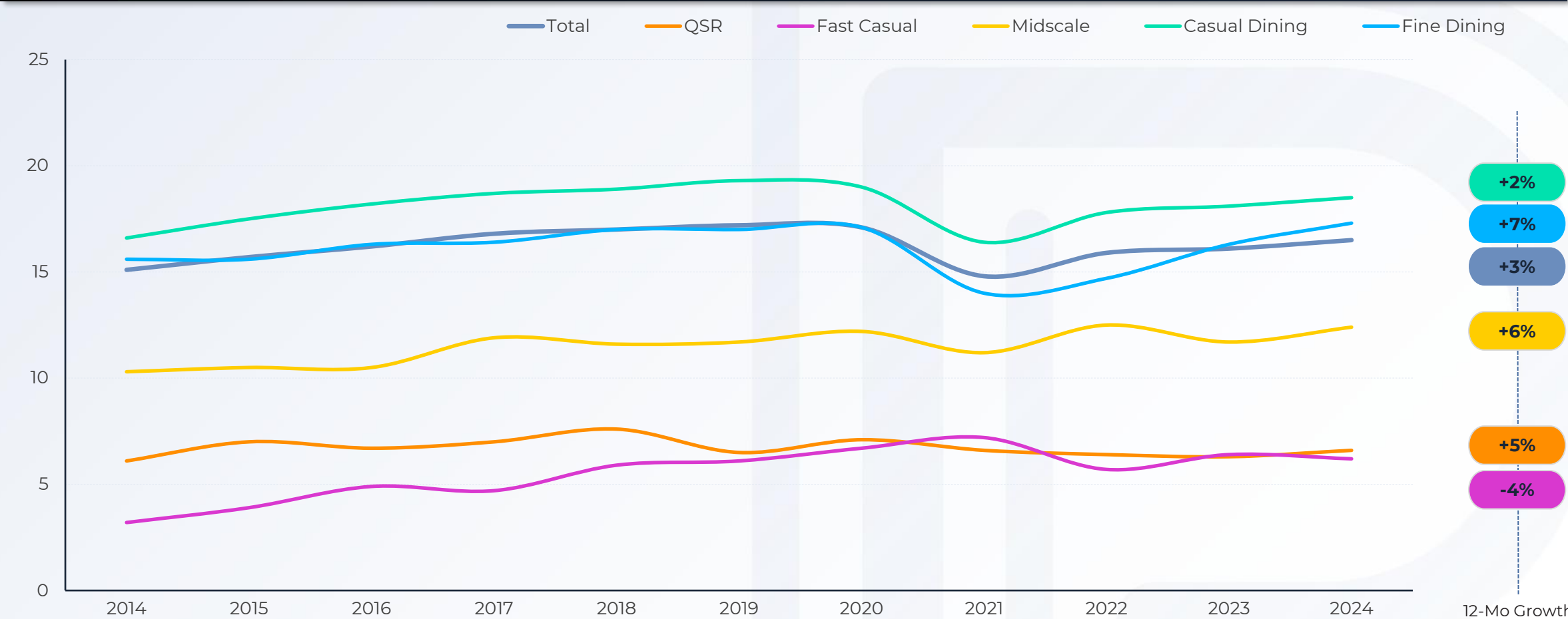
TOP GROWING BY CATEGORY					ranked by 12-Mo penetration growth				
COCKTAILS		WINE		BEER		SPIRITS*		OTHER ADULT BEV	
Zero Proof	+267%	Lillet	+292%	Punch	+142%	Rosa Reposado	+202%	Long Drink	+173%
Cupcake	+171%	Zero Proof	+206%	Slushie	+85%	Heirloom	+85%	Orange Cider	+86%
Green Bean	+171%	Vermouth	+171%	Crispy	+60%	Allspice	+79%	Kiwi	+82%
Sweet Cream	+157%	Bourguignonne	+124%	Atomic	+59%	Lychee	+68%	Soda	+78%
Affogato	+147%	Non-Alcoholic	+77%	Gummy	+59%	Demerara	+64%	Yuzu	+56%
Hugo	+127%	Macabeo	+51%	Sorghum	+59%	Scandinavian	+56%	Hard Iced Tea	+44%
Carajillo	+118%	Bartolo Mascarello	+50%	Candy	+49%	Hazelnut	+51%	Cranberry	+36%
Kombucha	+114%	Orange Wine	+44%	Sunny	+44%	Aquavit	+51%	Passion Fruit	+26%
Mocktail	+110%	Muller-thurgau	+33%	India Pale Lager	+44%	Non-Alcoholic Spirits	+48%	Blood Orange	+19%
Madagascar Vanilla	+97%	Bologna	+27%	Czech Pilsner	+43%	Pastis	+44%	Watermelon	+18%
Mango Lemonade	+97%	Malvasia	+22%	Rhubarb	+23%	Salted Caramel	+41%	Orange	+17%
White Port	+97%	Arizona	+22%	Yuzu	+21%	Berry	+39%	Citrus	+16%
Hot Honey	+88%	Sustainable	+22%	Dubbel	+19%	Creme De Cacao	+39%	Punch	+16%
Planters Punch	+83%	Marsala	+19%	Russian Imperial Stout	+16%	Rosemary	+37%	Blackberry	+7%
Truffle	+83%	Romanee-conti	+19%	Irish Red Ale	+13%	Creme De Cassis	+34%	Cherry Cider	+7%



# Cocktails are continuing their comeback post-COVID, fine dining seems to be leaning into focusing on cocktails.

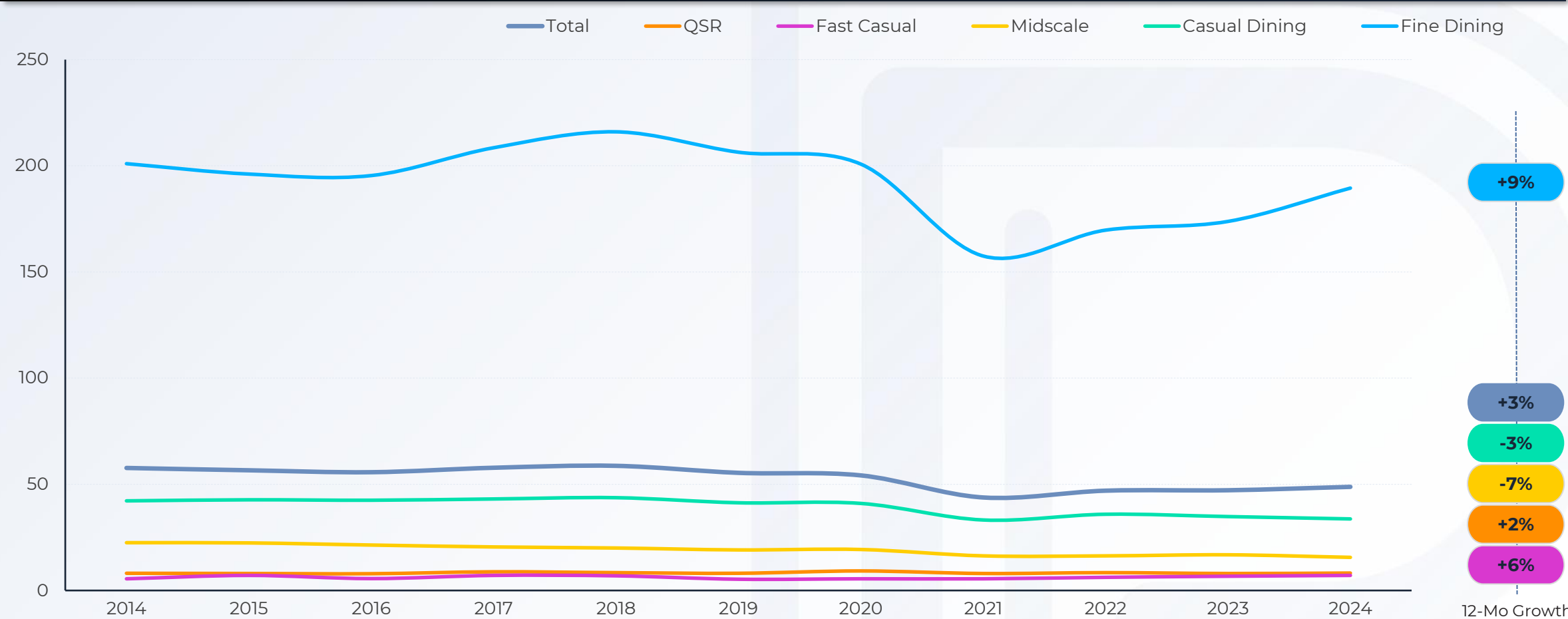
After a year of decline last year, QSR menus are growing again, suggesting that they are continuing to determine the role cocktails have on their menus.

COCKTAILS PER MENU - SEGMENT items per menu trend by segment

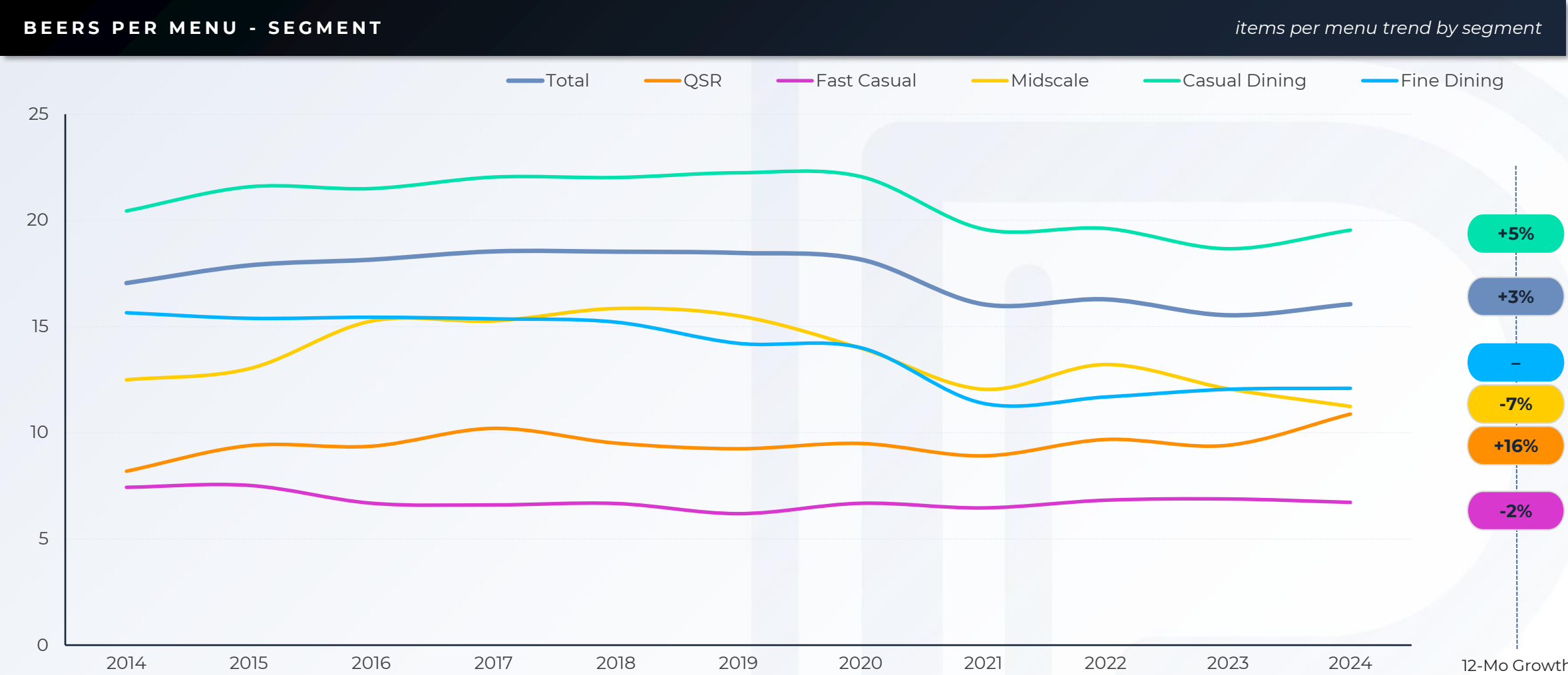


# Wine is essential at fine dining and the segment continues to grow their menus back to pre-pandemic levels.

WINES PER MENU - SEGMENT items per menu trend by segment



The number of beers per menu overall has grown slightly over the past twelve months with strong growth at QSR.

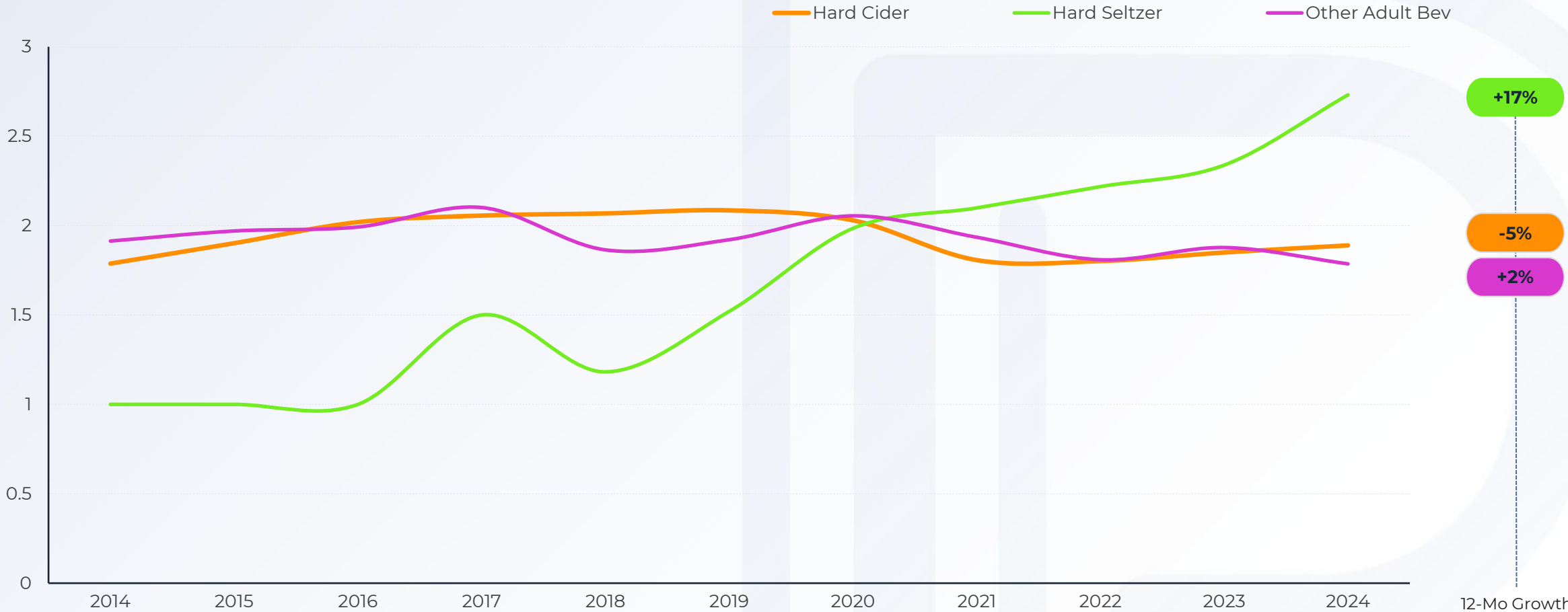




Overall, most menus that opt to offer other adult beverages tend to offer just one or two of the option, rather than full or longer lists.

The strategy seems to be to avoid the veto vote with just one item per drink type, allowing operators to not miss a sale to someone who will otherwise opt for no adult beverage or go elsewhere.

OTHER ADULT BEVERAGES PER MENU items per menu trend by segment





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