

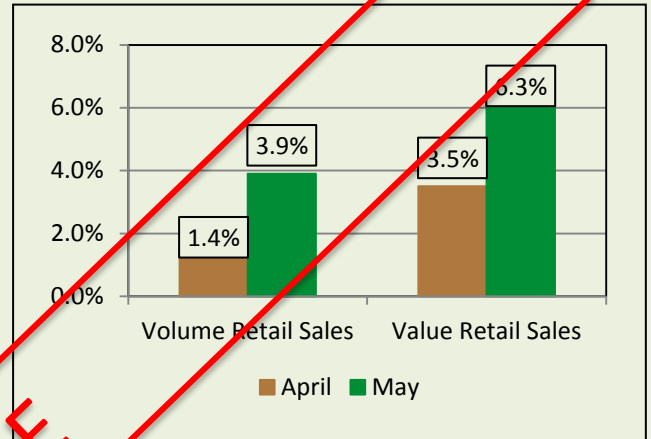
**RETAIL SALES**



**Retail sales rose +3.9% in May 2018 vs. May 2017, as good weather and the royal wedding celebrations contributed to a strong rise in retail sales in the month**

**Volume +3.9%**

**Value +6.3%**



**Update**  
May 2018 – 14<sup>th</sup> June 2018

- **May 2018** all retailing sales **volumes** were up **+3.9%** vs. May 2017, over the same period **values** were up **+6.3%**
  - **Store price inflation** was up +2.4% vs. May 2017
- Feedback from retailers suggested that the good weather and Royal Wedding celebrations encouraged food and household spending in May
- **May** average weekly **Internet sales** values were estimated to be £1.26bn up **+19.9%** vs. May LY
  - In **May 2018** internet sales were **17.5%** of all retail sales (excluding auto fuel) vs. 15.4% in May 2017

EXAMPLE

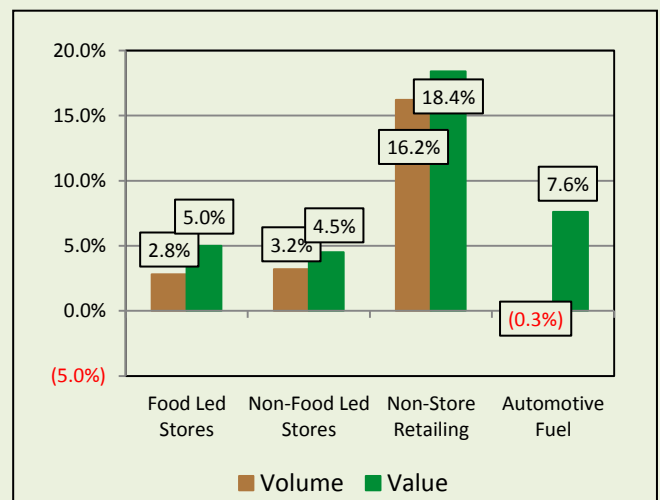
**SECTOR ANALYSIS**



**Strong sales in May masked the underlying trend which still sees the retail sector under pressure with House of Fraser and Poundworld hit the headlines**

**Food Volume +1.3%**

**Non-Food Volume +0.5%**



**Update**  
May 2018 – 14<sup>th</sup> June 2018

- **Food** led stores saw **volume** up **+2.8%** vs. last year, with **value** up **+5.0%** - average **price inflation** was **+2.1%** vs. +2.3% in April
  - Internet sales = 5.8% of all sector sales, growing by +20.7%
- **Non-Food** led stores saw **volume** up **+3.2%** vs. May 2017, with **value** up **+4.5%** - average **price inflation** was **+1.3%**, vs. +1.7% last month
  - Internet sales = 14.0% of all sector sales, growing by +23.7%
- **Non-Store** retailing saw **volume** up **+16.2%** vs. last year, with **value** up **+18.4%** - average **price inflation** was, **+2.3%** vs. +2.4% last month
  - Internet sales = 80.2% of all sector sales, growing by +17.2%

**GROCERY MARKET**

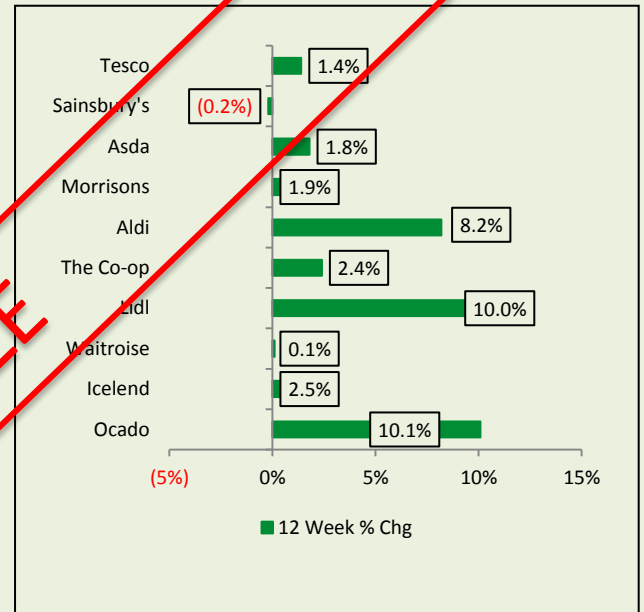


**Latest 12 week figures saw the Grocery Market grow by +2.1%, as wonky vegetables have helped Morrisons remain the fastest growing of the big four supermarkets**

**Grocery Market +2.1%**

**Grocery Inflation +1.9%**

- Latest 12 week figures show the **grocery market** is growing by **+2.1%** vs. +2.7% last month
  - **Grocery inflation** remained at +1.9% for the 12 week period ending 17<sup>th</sup> June 2018
- **Morrisons** was again the fastest growing of the big four as **Asda** and **Sainsbury's** had very mixed performances
  - **Latest 12 week shares** for **Tesco** = **27.7%** (LY = 27.9%), **Sainsbury's** = **15.6%** (LY = 16.0%), **Asda** = **15.1%** (LY = 15.2%), and **Morrisons** = **10.6%** (LY = 10.7%)
- **Co-op** recorded its strongest growth in over a year as sales and market share both grew
  - **Waitrose** grew sales by **+0.1%**, with **share** at **5.1%**
  - **The Co-op** saw sales up by **+2.4%**, with **share** at **6.2%**
- **Lidl** experienced double-digit growth as **Aldi** edged up to a new record high market share
  - **Aldi** was up **+8.2%** in the period, with **share** at **7.4%**
  - **Lidl** was up **+10.0%**, with a **share** of **5.4%**



**Update**  
12 Weeks Ending 17<sup>th</sup> June – 30<sup>th</sup> May 2018

Sources: Office of National Statistics  
Kantar WorldPanel

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