

ON-TRADE

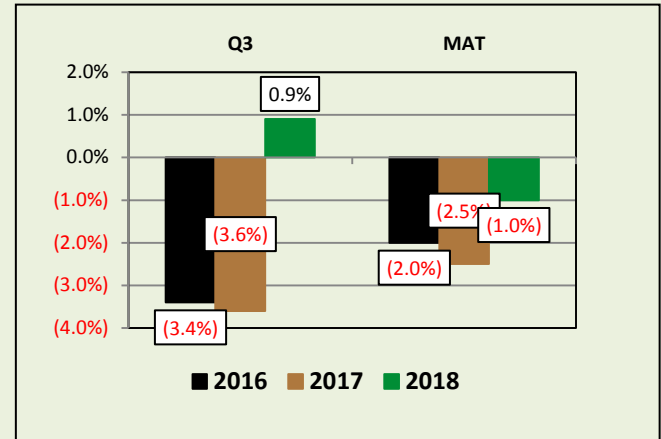


Beer sales in Pubs, Bars & Restaurants were up +0.9% in Q3 2018, taking the MAT to (1.0%) – this was driven by the great summer weather and the World Cup

**Quarter 3
+0.9%**

**MAT Q3
(1.0%)**

- Beer sales in the **on-trade** were **up +0.9%** in **Q3 2018**, this follows a decline of **(1.0%)** in Q2 2018
 - This compares to a decline of **(3.6%)** in Q3 last year
- This means the **MAT** is currently **declining** at a rate of **(1.0%)**
 - This compares to a MAT decline of **(2.5%)** this time last year
- The on-trade is currently 12.6M brls, which is 45.9% of all beer sales on a MAT basis



Update
Q3 2018 – 24th October 2018

OFF-TRADE

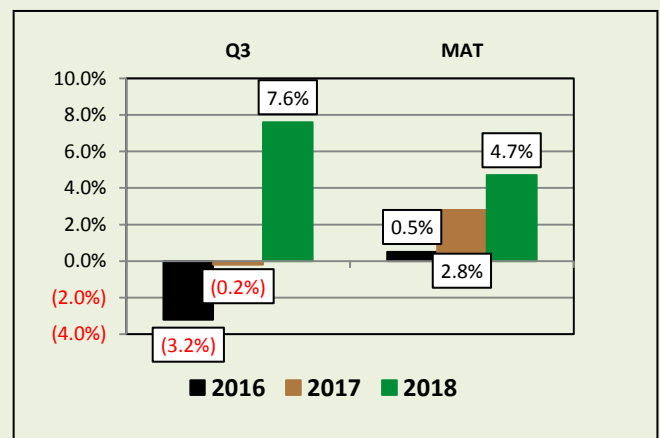


Beer sales in Supermarkets, Convenience Stores & Off-Licenses were up +7.6% in Q3 2018, taking the MAT to +4.7% - again driven by the weather and the World Cup

**Quarter 3
+7.6%**

**MAT Q3
+4.7%**

- Beer sales in the **off-trade** were **up +7.6%** in **Q3 2018**, this follows a growth of +7.7% in Q2 2018
 - This compares to a decline of **(0.2%)** in Q3 last year
- This means the **MAT** is currently **growing** at a rate of **+4.7%**
 - This compares to a MAT of +2.8% this time last year
- The off-trade is currently 14.8M brls, which is 54.1% of all beer sales on a MAT basis



Update
Q3 2018 – 24th October 2018

Source: British Beer & Pub Association

TOTAL TRADE

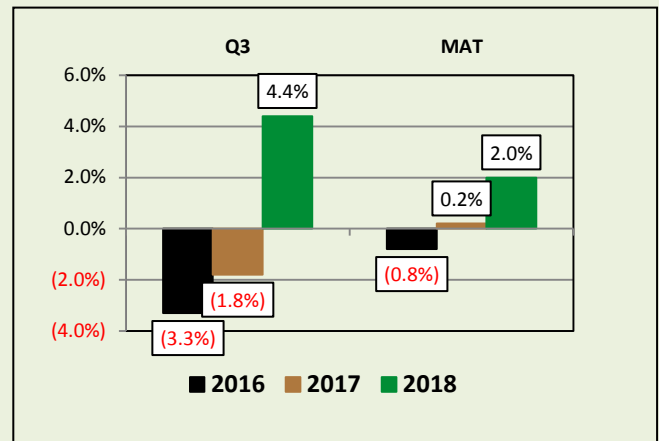


Total beer sales were up +4.4% in Q3 2018, with the MAT in growth of +2.0% primarily driven by sales through Supermarkets & Convenience Stores

**Quarter 3
+4.4%**

**MAT Q3
+2.0%**

- **Total beer sales grew in Q3 2018 by +4.4%** this follows an increase of +3.6% in Q2 2018
 - This compares to a decline of (1.8%) in Q3 last year
- This means the **MAT** is currently in **growth** at a rate of **+2.0%**
 - This compares to a MAT which was up +0.2% this time last year
- The total UK beer market is currently 27.4M brls, about 500th brls more than it was at this time last year



Update
Q3 2018 – 24th October 2018

Source: British Beer & Pub Association

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