

# Ashdale Insights

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## Don't be intolerant

*This month we ask are operators missing out by not providing gluten and other Free From options?*

Whether we realise it or not many of us have had the luxury of being able to eat or drink whatever we want. So over time we can come to some sort of conclusion when it comes to what we like and what we would rather avoid. I for one have taken this for granted. Following on from this I was talking with a friend a few years ago about how fussy children can be when it comes to food. I explained how amused I was that both my children having turned 18 now adore foods which just a few years earlier they would have refused to eat.

My friend's story however was somewhat different. She had also been through a similar experience with what she assumed was a 'fussy eater' only to discover after consulting with a doctor that her child had a genuine allergic reaction to a certain food



group. As a result as a family they needed to re-think what they ate both in and out of home. Whilst tweaking meals at home was a slight inconvenience it became clear that when eating in restaurants or pubs there was often a lack of options or even worse a lack of information regarding what individual menu items contained.

This meant that some restaurants and pubs just became no go areas for her whole family.

### Allergies and intolerance

As with most things in life things are rarely black or white. And this is certainly the case when it comes to people and

food. For example you have individuals who have what is known as an allergy. This is usually defined as a specific response, often quite severe, by the immune system to a substance which the body mistakenly believes to be harmful. You also have people who suffer an adverse reaction to a food type which although not impacting the immune system can cause varying degrees of discomfort and produce similar symptoms to that of an allergy.

**To read this in full and previous articles go to Ashdale Articles**

[www.ashdale-consulting.com](http://www.ashdale-consulting.com)

**The largest downward contribution came from gas & electricity, as prices fell in part as a result to the Ofgem imposed price cap**

**Co-op was the only non-discounter to gain market share over the last 12 weeks, driven by more shoppers**

**Despite concerns over Brexit the overall score for Consumer Confidence remained quite stable**

## Economic Headlines

*These headlines are from our Economic Bulletin.*

CPI for January 2019 was +1.8% down on +2.1% in December, this represents a two year low helped by falling energy prices and the cost of fuel.

Latest figures from the ONS show that unemployment remained

at 4.0%, as the number of people in work reached a record high of 32.6 million.

The estimate for GDP for Q4 2018 was +0.2%, meaning that GDP for the full year was estimated to be +1.4% vs +2.1% for 2017.

CPI	+1.8%
RPI	+2.5%
CPIH	+1.8%

UNEMPLOYMENT	+4.0%
PAY	+3.4%

Q4 GDP	+0.2%
TRADE BALANCE	(£10.4BN)
SERVICES	+£26.31BN

## Retail Headlines

*These headlines are from our Retail Bulletin.*

Retail sales rose +4.2% in January 2019 vs. January 2018, clothing stores saw strong growth due to price reductions and food also grew after the post-Christmas dip.

January's increase in retail sales shows that most households have

maintained a positive mentality, despite the uncertain political situation over Brexit.

Latest 12 week figures saw the Grocery Market grow by +1.7%, boosted in part by the strong performance of fresh produce for Veganuary.

RETAIL VOLUMES	+4.2%
RETAIL VALUES	+4.5%
INTERNET SALES	+9.8%

GROCERY MARKET	+1.7%
GROCERY INFLATION	+1.3%

Aldi	+9.1%
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## Consumer Spending Headlines

*These headlines are from our Consumer Spending Bulletin.*

Average family spending power was up £11 a week in December at £207, as wage growth continues to increase faster than headline inflation (+3.3% vs +2.1%). **No update.**

The estimated average mortgage debt in

December was £128,823, meaning the average annual interest paid would be £3,195 per household (based on a rate of 2.48%).

GfK's UK Consumer Confidence Index was (13) in February up +1 compared to January, as confidence remains somewhat 'stoic' amid fears of the unknown.

HOUSEHOLD INCOME	£799
TAXES & COST OF LIVING	£592
DISCRETIONARY	£207

HOUSEHOLD DEBT	£59,261
EXC MORTGAGES	£7,863

Overall Confidence	(13)
LY Personal Finances	+0
NY Personal Finances	+1

## Cider Update

Latest data from HMRC shows that cider returns in Q4 2018 were down **(3.8%)** on the same quarter a year ago.

The quarter started off poorly as returns in October were down **(12.5%)** on October last year.

This improved in November as returns

were up +21.4% vs. November 2017.

The quarter ended quite poorly as the returns for December were down **(18.4%)** compared to December last year.

A result of this has been that Cider returns on a MAT basis continue to fall and are now in decline at **(7.5%)**.

This level of decline is similar to that which was seen at the end of 2016 and more in keeping with longer term trends seen for traditional Ciders.

Source: HMRC February 2019



***During 2018 only Q2 saw returns up on the previous year, helped by the great summer weather***

## Casual Dining Update

The Top Dog from El Perro Negro in Glasgow has been named the best burger in the UK at the National Burger Awards 2019. It consisted of a beef patty, bone marrow and Roquefort butter, double bacon, caramelized onions and black truffle mayonnaise.

A third (33.7%) of UK diners have failed to turn

up to a restaurant booking without informing the restaurant at some point in their life. According to new research by OpenTable, young adults are the worst offenders, with 25% of 16 to 24-year-olds admitting to regularly failing to show up for a restaurant reservation.

The UK's organic food and drink market has hit an all-time high of £2.3bn, according to Soil Association's Organic Market Report as sales grew 5.3% in 2018.



***Organic accounts for 1.5% of the overall food and drink market.***

## Weather Summaries

For more months and years then simply go to:

[www.ashdale-consulting.com](http://www.ashdale-consulting.com)

JANUARY	
<b>DRY</b> <b>COLD</b>	Temp = +0.0 Rain = 52 Sun = 101
<ul style="list-style-type: none"> <li>• Dry &amp; mild start, becoming colder with some frost &amp; snow</li> <li>• 9<sup>th</sup> driest January since 1910 and driest since 2006</li> </ul>	

FEBRUARY	
<b>WARM</b>	Temp = +2.4 Rain = 82 Sun = 144
<ul style="list-style-type: none"> <li>• Started with snow &amp; freezing temps and ended much warmer</li> <li>• 2<sup>nd</sup> sunniest February on record with temps over 20°C in places</li> </ul>	

***The winter saw two named storms, Deidre in mid-December and Erik in early February***

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## Helping clients...

**Sell More**  
**Charge More**  
**Lower Costs**

## About Ashdale Business Consulting

I help my clients *sell more, charge more* and *lower costs*.

Having been a client myself I understand you always have *more things which need doing* than you ever have time for. Sometimes you also need *additional skills* or *experience* to complement those already in your organisation.

### Sound familiar?

That's where help. I provide an independent flexible resource to draw from on just those occasions. I work across a range of different industry sectors providing *analysis, insight* and *strategic thinking*, however I specialise in helping the UK alcohol and hospitality sector.

Clients range from *individual outlets* and *microbrewers* through to *regional/national brewers*, as well as *global drinks companies* and *trade organisations*.

For more information go to my website:

[www.ashdale-consulting.com](http://www.ashdale-consulting.com)

## Dates and Events for Your Diary

### General

#### March

1<sup>st</sup> St David's Day  
5<sup>th</sup> Shrove Tuesday  
13<sup>th</sup> Spring Statement  
15<sup>th</sup> Comic Relief  
17<sup>th</sup> St Patrick's Day  
29<sup>th</sup> Brexit  
31<sup>st</sup> Mother's Day  
31<sup>st</sup> Clocks Go Back

#### April

8<sup>th</sup> London Emission Charge  
19<sup>th</sup> Good Friday  
21<sup>st</sup> Easter Sunday  
23<sup>rd</sup> St George's Day

### Licensed Trade

#### March

11<sup>th</sup>-17<sup>th</sup> Sheffield Beer Wk  
13<sup>th</sup>-14<sup>th</sup> Beer X (Liverpool)  
29<sup>th</sup>-30<sup>th</sup> CBR Taps (B'ham)

#### April

4<sup>th</sup>-7<sup>th</sup> We Are Lager (Man)  
8<sup>th</sup>-10<sup>th</sup> National  
Convenience Show (NEC)  
29<sup>th</sup> UK Coffee Week

### Sports

#### March

17<sup>th</sup> First Grand Prix (Aus)  
12<sup>th</sup>-15<sup>th</sup> Cheltenham  
22<sup>nd</sup> Eng vs. Czech Rep  
25<sup>th</sup> Montenegro vs. Eng  
31<sup>st</sup> Grand Prix (Bahrain)

#### April

6<sup>th</sup> Grand National (Aintree)  
7<sup>th</sup> Boat Race (Lnd)  
11<sup>th</sup>-14<sup>th</sup> Masters Golf (USA)  
28<sup>th</sup> London Marathon

## Ashdale Training Dates

### Helping Pubs & Bars Make More Money

Please get in touch to find out more about training dates & availability.

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