

# Ashdale Quarterly Newsletter

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## Shall we eat outside today

*This quarter we ask are do operators do as much as they can to enhance the experience of those customers who dine outside?*

According to the Met Office for official reporting purposes the summer as far as they are concerned begins on the 1st of June (and ends on the 31st of August).

For those of you who prefer a more ancient and mystical definition, the summer solstice heralds the beginning of summer for the Northern Hemisphere and is usually on June 21st, around about 12.24am.

Of course when it comes to the general public and operators alike the reality is that we know summer has arrived when the hardy souls who need to go out to have a cigarette are joined by the rest of us to eat and drink outside.

And whilst this may very much depend on which part of the country you are in and the weather that you are experiencing, in broad



terms outdoor dining becomes more and more frequent from the beginning of May and can continue right through September.

You may have noticed up to this point I have avoided using the term al fresco. Whilst a popular label used in this country, it is borrowed from the Italian for "in the cool [air]", although the Italians themselves use the phrases fuori or all'aperto. In fact in Italy the expression al fresco usually refers to spending time in jail!

Interestingly the Spanish meaning of al fresco is similar to that of the Italians. Which leads me to ask do your efforts to

deliver an outdoor eating and drinking experience give you a real point of difference or is it just a crime?

Clean and well set tables When it comes to priorities for waiting-on staff, taking orders and delivering food is usually high up on the things they look to do. For the more commercially minded, especially when a tip maybe involved, providing and settling the bill can also be well up there.

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

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***The UK beer market has now been in growth on a 12-month rolling basis since June 2018***

***Although not in these figures, the general consensus is that fruit based ciders continue to perform well***

***It is quite possible that wine, especially sparkling, is suffering due to the success of flavoured gin***

## Beer Update

Latest data from the British Beer & Pub Association shows that beer sales in Q1 2019 were up +1.3% on the same quarter a year ago. The growth was driven by sales through Supermarkets & Convenience Stores although sales through Pubs, Bars & Restaurants also did well.

Sales through Pubs, Bars & Restaurants in the UK in Q1 were down (1.1%). This compares to growth of +2.2% in Q4 last year and a decline of (1.9%) in Q1 in 2018.

Sales through Supermarkets & Convenience Stores in the UK in Q1 were up +3.6% compared to the same quarter last year.

This compares to an increase of +3.8% in Q4 and a decline of (1.8%) in Q1 in 2018.

Total sales on a MAT basis are up +3.7%.

Source: BBPA April 2019



## Cider Update

Latest data from HMRC shows that cider returns in Q1 2019 were down (0.8%) on the same quarter a year ago.

The quarter started off well as returns in January were up +12.6% on January last year.

This didn't last as returns in February were down (3.6%) vs. February 2018.

The quarter ended quite poorly as the returns for March were down (6.8%) compared to March last year.

A result of this has been that Cider returns on a MAT basis continue to fall and are now in decline at (5.0%).

These declines are for traditional apple Ciders

only. Fruit based Cider volumes are categorized as Made-Wine for duty by HMRC.

Source: HMRC May 2019



## Wine Update

Latest data from the HMRC shows that still wine returns for March 2019 were down (1.0%) March the previous year.

This combined with January up +0.5% and February up +2.3% meant that Q1 2019 was up +0.4% vs. 2018.

This means that the current MAT is down (0.7%) vs. this time last

year.

Sales of sparkling wines in March were down (5.4%). Combined with a decline in January of (3.9%) and decline of (9.4%) in February meant Q1 2019 finished down (6.3%) vs. 2018.

This means that the current MAT is in decline of (1.5%).

It is quite possible that wine, especially sparkling, is suffering due to the success of flavoured gin.

Source: HMRC May 2019



## Pubs & Bars Update

The Church Inn in Mobberley, Cheshire, has been named as the best pub in the UK, having secured the top accolade at last night's National Pub & Bar Awards.

Research by Greene King has revealed that fans will spend 10 hours a week watching sport on TV this summer, starting with the Champions League final

on the 1<sup>st</sup> of June. According to the research, 34% of British males plan on watching over 10 hours of sport across the summer months, whereas 28% of females only plan on watching 2 to 4 hours a week.

Cask Marque has announced the launch of a new accreditation

scheme called Beer Marque. Inspections started in May with a consumer program due to begin in 2020, once Beer Marque has over 2,000 plaques on walls.



***The Beer Marque aim is to champion 15,000 pubs that deliver a great beer experience to their customers***

## Casual Dining Update

More than one-third (38%) of Brits only try new venues to eat or drink at less than once a year, according to new research from BLACKBX. With Londoners more likely to try new venues more often.

Amazon has become the largest investor in Deliveroo's Series G funding round, as the

delivery partner looks to raise \$575m alongside existing investors. This new round of funding takes the total raised to date to \$1.53bn.

Jamie Oliver Restaurant Group has called in administrators, leading to the closure of all Jamie's Italian sites except for the three sites at Gatwick Airport, Barbecoa and

Fifteen London. The closures have led to the loss of 1,000 jobs. The international restaurants will continue to trade as normal, as will Fifteen Cornwall, as a franchise.



***With this funding, Deliveroo will look to grow its engineering team based in its London headquarters***

## Supermarket Update

Latest 12 week figures show the grocery market is growing by +1.3% vs. +2.0% last month.

Grocery inflation is +1.2% for the 12 week period ending 19th May 2019

Tesco was the strongest performing of the 'big 4' even though sales were flat.

Tesco's profits have

soared 29 per cent despite an uncertain market as the store continues its impressive turnaround. Revenues at wholesaler Booker, which Tesco acquired in 2016, jumped 11 per cent.

Sainsbury's is overhauling its premium own-label brand Taste the Difference with fresh packaging, reformulated

recipes and new lines. The new branding will feature an updated logo and food photography visuals across packs.

Source: Kantar World Panel and The Grocer



***Sainsbury's new packaging will feature longer product descriptions focusing on provenance and quality***

## Helping clients...

**Sell More  
Charge More  
Lower Costs**

## Dates and Events for Your Diary

### General

#### July

4<sup>th</sup> Independence Day (USA)  
14<sup>th</sup> Bastille Day (France)

#### August

5<sup>th</sup> Bank Holiday (Scot)  
26<sup>th</sup> Bank Holiday (E&W)

#### September

23<sup>rd</sup> Autumnal Equinox

### Licensed Trade

#### July

1<sup>st</sup> & 2<sup>nd</sup> Imbibe Olympia  
13<sup>th</sup> & 14<sup>th</sup> Weymouth  
Seafood Festival

#### August

9<sup>th</sup> 11<sup>th</sup> London Craft Beer  
Festival  
6<sup>th</sup> – 10<sup>th</sup> GBBF Olympia  
20<sup>th</sup> – 24<sup>th</sup> Peterborough Beer  
Festival

#### September

19<sup>th</sup> – 29<sup>th</sup> Cask Ale Week

### Sports

#### July

1<sup>st</sup> – 14<sup>th</sup> Wimbledon  
14<sup>th</sup> British Grand Prix  
14<sup>th</sup> Cricket ODI WC Final  
18<sup>th</sup> – 21<sup>st</sup> British Golf Open

#### August

1<sup>st</sup> Eng vs Aus Ashes Starts  
4<sup>th</sup> Hungarian Grand Prix  
10<sup>th</sup> Premier League Starts  
24<sup>th</sup> Rugby League Cup Final

#### September

1<sup>st</sup> Belgian Grand Prix  
7<sup>th</sup> Eng vs Bulgaria  
8<sup>th</sup> – 15<sup>th</sup> Cycling Tour (UK)  
10<sup>th</sup> Eng vs Kosovo  
20<sup>th</sup> Rugby WC Starts (Jpn)  
21<sup>st</sup> T20 Final Day (B'ham)

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## 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:

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