

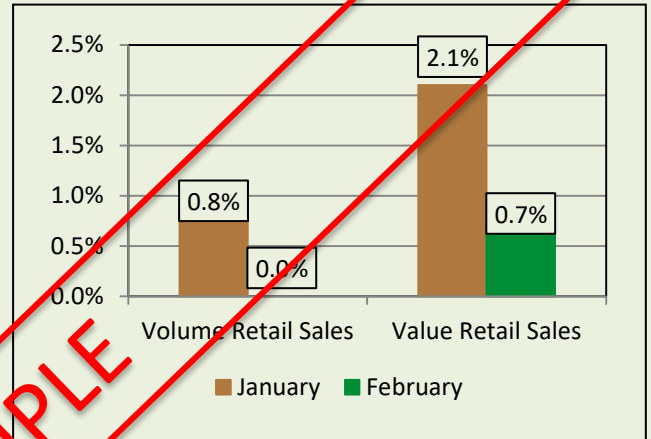
**RETAIL SALES**



**Retail sales were flat at +0.0% in February 2020 vs. February 2019, as the bad weather kept British shoppers at home – this pre-dates any Covid-19 effect**

**Volume +0.0%**  
**Value +0.7%**

- **February 2020** all retailing sales **volumes** were **flat +0.0%** vs. February 2019, over the same period **values** were **up +0.7%**
  - **Store price inflation** was up +0.5% vs. February 2019
- February's bad weather kept Britain's shoppers at home and resulted in a fall in retail sales even before the coronavirus pandemic led to the closure of all non-essential shops
- **February** average weekly **Internet sales** values were estimated to be £1.31bn **up +5.3%** vs. Feb LY
  - In **February 2020** internet sales were **18.8%** of all retail sales (excluding auto fuel) vs. 18.3% in February 2019



**Update**  
February 2020 – 26<sup>th</sup> March 2020  
\* Internet sales non-seasonally adjusted

**EXAMPLE**

**SECTOR ANALYSIS**

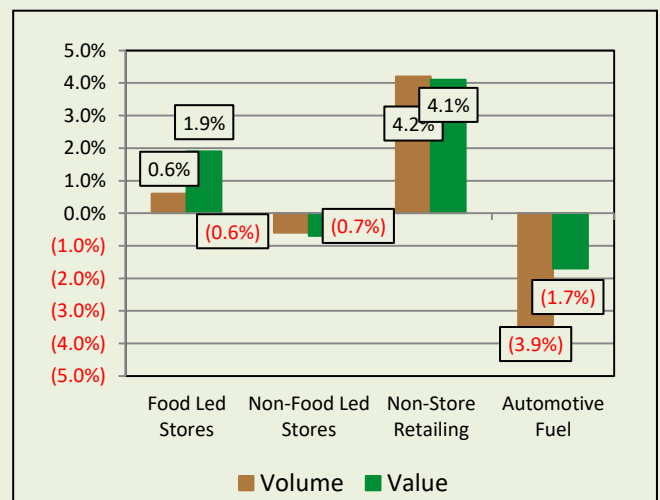


**While the expectation is that Food led stores and online will receive a boost in March the drop in the other sectors is likely to be at unprecedented levels**

**Food Volume +0.6%**

**Non-Food Volume (0.6%)**

- **Food** led stores saw **volume** up **+0.6%** vs. last year, with **value** up **+1.9%** - average **price inflation** was **+1.0%** vs. +1.5% in January
  - Internet sales = 5.4% of all sector sales, growing by +0.8%
- **Non-Food** led stores saw **volume** down **(0.6%)** vs. February 2019, with **value** down **(0.7%)** - average **price inflation** was **(0.3%)**, vs. +0.2% last month
  - Internet sales = 15.5% of all sector sales, growing by +3.6%
- **Non-Store** retailing saw **volume** up **+4.2%** vs. last year, with **value** up **+4.1%** - average **price inflation** was, **(0.7%)** vs. **(0.1%)** last month
  - Internet sales = 81.1% of all sector sales, growing by +7.0%



**Update**  
February 2020 – 26<sup>th</sup> March 2020

**GROCERY MARKET**

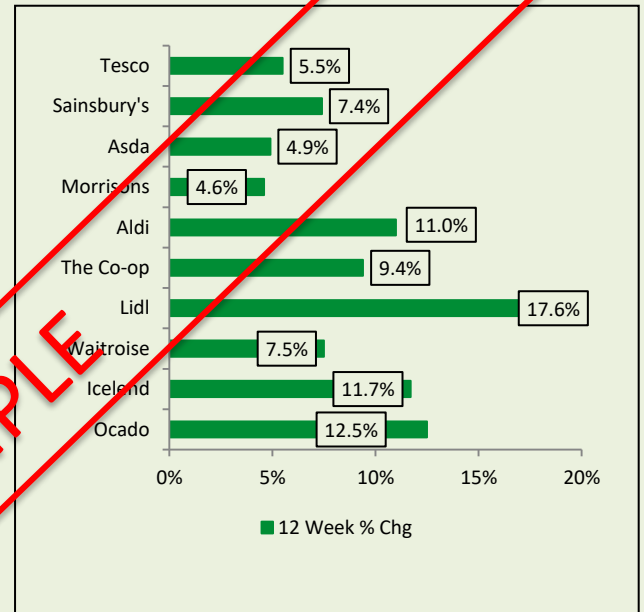


**Latest 12 week figures saw the Grocery Market grow +7.6%, with the past four weeks growing by +20.6% the biggest month on record for grocery sales**

**Grocery Market +7.6%**

**Grocery Inflation +0.9%**

- Latest 12 week figures show the **grocery market +7.6%** vs. +0.7% last month
  - **Grocery inflation** is +0.9% for the 12 week period ending 22<sup>nd</sup> March 2020
- With growth of +7.4%, **Sainsbury's** was the fastest growing of the traditional big four this period
  - **Latest 12 week shares** for **Tesco = 26.8%** (LY = 27.3%), **Sainsbury's = 15.3%** (LY = 15.3%), **Asda = 15.0%** (LY = 15.4%), and **Morrison's = 10.0%** (LY = 10.3%)
- Co-op's extensive number of convenience outlets helped to attract people looking to shop locally
  - **The Co-op** saw sales up by +9.4%, with **share at 6.2%**
  - **Waitrose** sales declined by +7.5%, with **share at 5.0%**
- **Lidl** sales were up +17.6%, as its market share rose by +0.5pp, with **Aldi** reaching a new record share high 8.2%
  - **Aldi** was up +11.0% in the period, with **share at 8.2%**
  - **Lidl** was up +17.6%, with a **share of 6.1%**



**Update**  
12 Weeks Ending 22<sup>nd</sup> March 2020 – 31<sup>st</sup> March 2020

Sources: Office of National Statistics  
Kantar WorldPanel

For further information please contact:

**Chris Holden**  
**Ashdale Business Consulting Ltd**  
**+44 (0) 7967 197533**  
**chris@ashdale-consulting.com**



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