

ON-TRADE

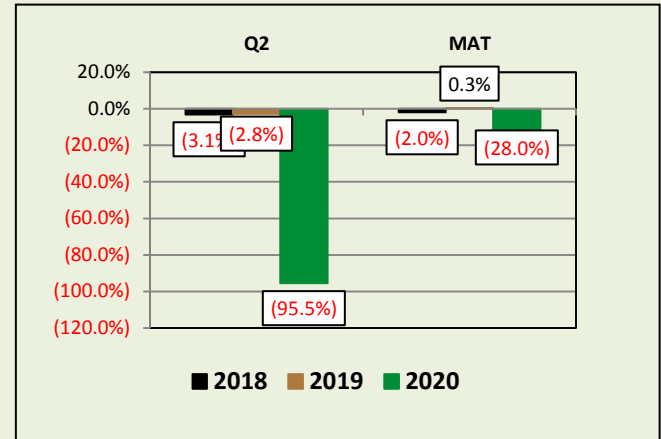


Beer sales in Pubs, Bars & Restaurants were down (95.5%) in Q2 2020, taking the MAT to (28.0%) – as outlets were closed in April, May and June

**Quarter 2
(95.5%)**

**MAT Q2
(28.0%)**

- Beer sales in the **on-trade** were **down (95.5%)** in **Q2 2020**, this follows a decline of **(18.1%)** in Q1 2020
 - This compares to a decline of **(2.8%)** in Q2 last year
- This means the **MAT** is currently **declining** by **(28.0%)**
 - This compares to a MAT growth of +0.3% this time last year
- The on-trade is currently 9.09M brls, which is 34.8% of all beer sales on a MAT basis



Note: BBPA data is based on sales into the trade so there were some sales recorded in June in preparation for some outlets re-opening in July

Update
Q2 2020 – 4th August 2020

OFF-TRADE

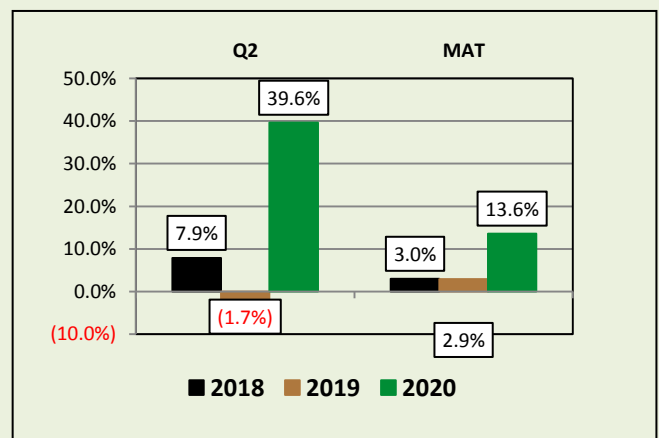


Beer sales in Supermarkets, Convenience Stores & Off-Licenses were up +39.6% in Q2 2020, taking the MAT to +13.6%, as sales benefitted from the closure of pubs etc.

**Quarter 2
+39.6%**

**MAT Q2
+13.6%**

- Beer sales in the **off-trade** were **up +39.6%** in **Q2 2020**, this follows a growth of +1.8% in Q1 2020
 - This compares to a decline of **(1.7%)** in Q2 last year
- This means the **MAT** is currently **growing** at a rate of **+13.6%**
 - This compares to a MAT of +2.9% this time last year
- The off-trade is currently 17.02M brls, which is 65.2% of all beer sales on a MAT basis



Update
Q2 2020 – 4th August 2020

Source: British Beer & Pub Association

TOTAL TRADE

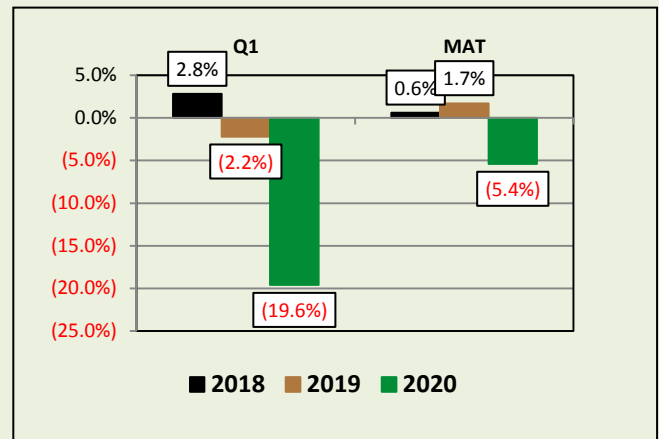


Total beer sales were down **(19.6%)** in Q2 2020, with the MAT in decline of **(5.4%)**, with the road to recovery likely to be slower than previously expected

Quarter 2
(19.6%)

MAT Q2
(5.4%)

- Total beer sales declined in Q2 2020 by **(19.6%)** this follows a decline of **(8.1%)** in Q1 2020
 - This compares to a decline of **(2.2%)** in Q2 last year
- This means the **MAT** is currently in **decline** at a rate of **(5.4%)**
 - This compares to a MAT which was up +1.7% this time last year
- The total UK beer market is currently 26.11M brls, about **(1.5M)** brls less than it was at this time last year



Update
Q2 2020 – 4th August 2020

Source: British Beer & Pub Association

For further information please contact:

Chris Holden
Ashdale Business Consulting Ltd

07967 197533
info@ashdale-consulting.com



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