

ON-TRADE

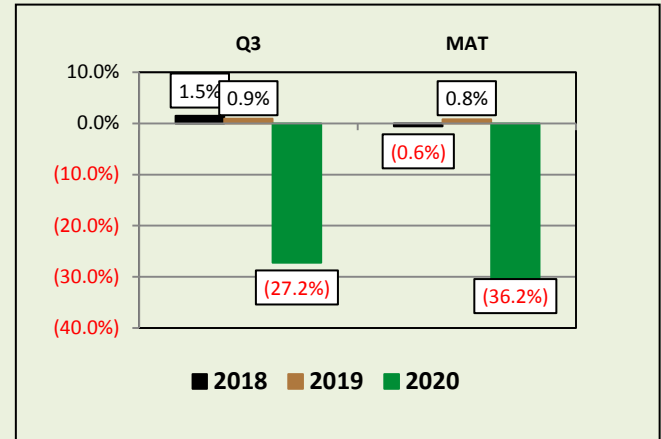


Beer sales in Pubs, Bars & Restaurants were down **(27.2%)** in Q3 2020, taking the MAT to **(36.2%)** – as some outlets began to re-open in July

Quarter 3
(27.2%)

MAT Q3
(36.2%)

- Beer sales in the **on-trade** were **down (27.2%)** in **Q3 2020**, this follows a decline of **(95.6%)** in Q2 2020
 - This compares to a growth of +0.9% in Q3 last year
- This means the **MAT** is currently **declining** by **(36.2%)**
 - This compares to a MAT growth of +0.8% this time last year
- The on-trade is currently 8.12M brls, which is 31.2% of all beer sales on a MAT basis



Update
Q3 2020 – 5th November 2020

OFF-TRADE

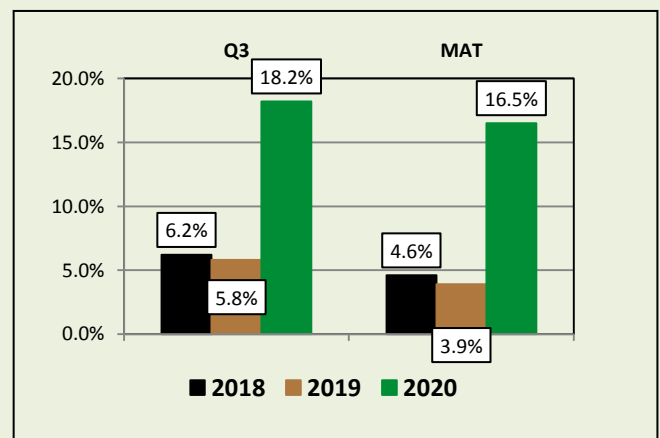


Beer sales in Supermarkets, Convenience Stores & Off-Licenses were up **+18.2%** in Q3 2020, taking the MAT to **+16.5%**, as sales begin to slow as some pubs re-opened

Quarter 3
+18.2%

MAT Q3
+16.5%

- Beer sales in the **off-trade** were **up +18.2%** in **Q3 2020**, this follows a growth of +39.3% in Q2 2020
 - This compares to a growth of +5.8% in Q3 last year
- This means the **MAT** is currently **growing** at a rate of **+16.5%**
 - This compares to a MAT of +3.9% this time last year
- The off-trade is currently 17.90M brls, which is 68.8% of all beer sales on a MAT basis



Update
Q3 2020 – 5th November 2020

Source: British Beer & Pub Association

TOTAL TRADE

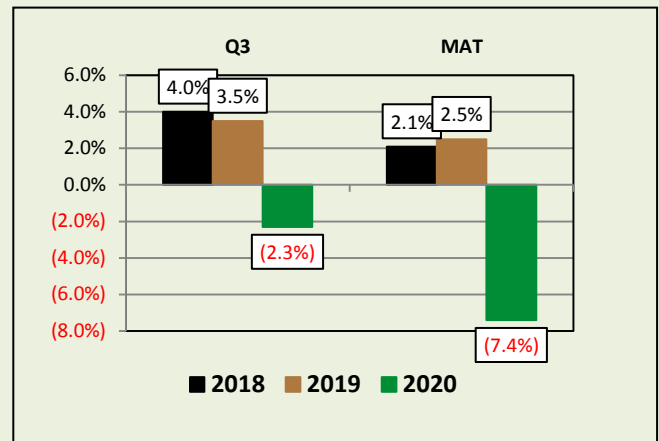


Total beer sales were down **(2.3%)** in Q3 2020, with the MAT in decline of **(7.4%)**, as sales are impacted by pub occupancy levels, curfews and local restrictions

Quarter 3
(2.3%)

MAT Q3
(7.4%)

- Total beer sales declined in Q3 2020 by **(2.3%)** this follows a decline of **(19.5%)** in Q2 2020
 - This compares to a growth of +0.9% in Q3 last year
- This means the **MAT** is currently in **decline** at a rate of **(7.4%)**
 - This compares to a MAT which was up +2.5% this time last year
- The total UK beer market is currently 26.02M brls, about **(2.1M)** brls less than it was at this time last year



Update
Q3 2020 – 5th November 2020

Source: British Beer & Pub Association

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