

ON-TRADE

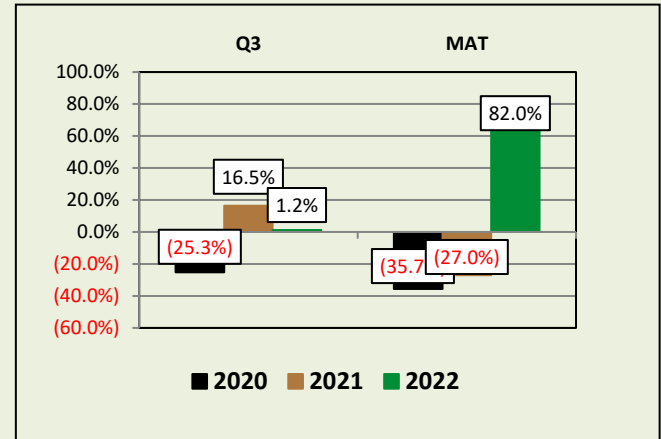


Beer sales in Pubs, Bars & Restaurants were up +1.2% in Q3 2022, as growth begins to slow as the cost-of-living crisis starts to make an impact

**Quarter 3
+1.2%**

**MAT Q3
+82.0%**

- Beer sales in the **on-trade** were **up +1.2%** in **Q3 2022**, this follows a growth of over +28.2% in Q2 2022
 - This compares to a growth of over +100% in Q3 last year
- This means the **MAT** is currently **growing by +82.0%**
 - This compares to a MAT decline of **(27.0%)** this time last year
- The on-trade is currently **10.87M brls**, which is **40.7%** of all beer sales on a MAT basis



Update
Q3 2022 – 9th November 2022

OFF-TRADE

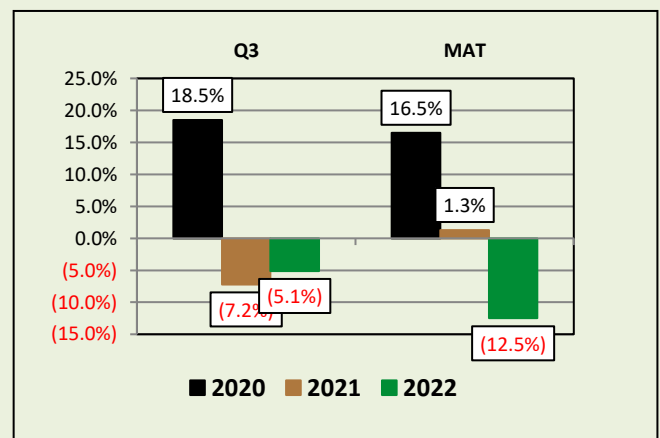


Beer sales in Supermarkets, Convenience Stores & Off-Licenses were down (5.1%) in Q3 2022, taking the MAT to (12.5%), as sales continue to lap lockdown levels

**Quarter 3
(5.1%)**

**MAT Q3
(12.5%)**

- Beer sales in the **off-trade** were **down (5.1%)** in **Q3 2022**, this follows a decline of **(15.6%)** in Q2 2022
 - This compares to a decline of **(7.2%)** in Q3 last year
- This means the **MAT** is currently **declining** at a rate of **(12.5%)**
 - This compares to a MAT of +1.3% this time last year
- The off-trade is currently **15.9M brls**, which is **59.3%** of all beer sales on a MAT basis



Update
Q3 2022 – 9th November 2022

Source: British Beer & Pub Association

TOTAL TRADE

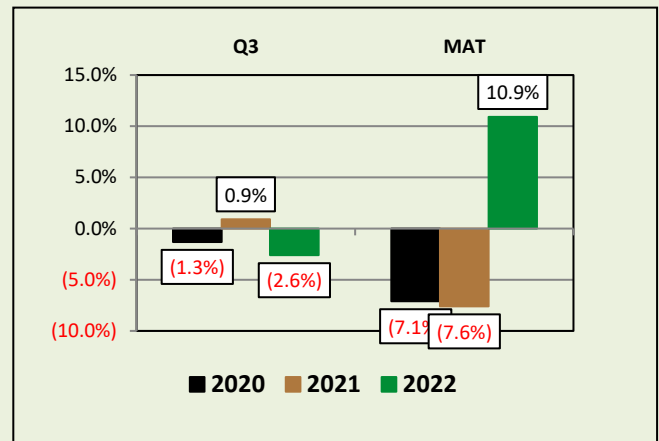


Total beer sales were up +39.4% in Q1 2022, with the MAT in growth of +18.4%, as the trade tries to return to pre-lockdown sales trends

**Quarter 3
(2.6%)**

**MAT Q3
+10.9%**

- **Total beer sales declined in Q3 2022 by (2.6%)** this follows a decline of (2.2%) in Q2 2022
 - This compares to a growth of +0.93% in Q3 last year
- This means the **MAT** is currently in **growth** at a rate of **+10.9%**
 - This compares to a MAT which was down (7.6%) this time last year
- The total UK beer market is currently **26.73M brls**, about +2,622th brls more than it was at this time last year



Update
Q3 2022 – 9th November 2022

Source: British Beer & Pub Association

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