

ON-TRADE

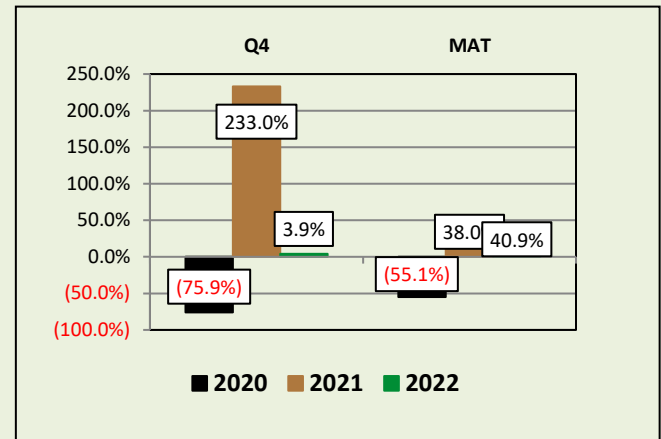


Beer sales in Pubs, Bars & Restaurants were up +3.9% in Q4 2022, taking the MAT to +40.9% – as comparisons vs last year are still impacted by Covid restrictions.

**Quarter 4
+3.9%**

**MAT Q4
+40.9%**

- Beer sales in the **on-trade** were **up +3.9%** in **Q4 2022**, this follows a growth of +1.7% in Q3 2022
 - This compares to a growth of +233.0% in Q4 last year
- This means the **MAT** is currently **growing** by +40.9%
 - This compares to a MAT growth of +38.0% this time last year
- The on-trade is currently **11.1M brls**, which is **41.3%** of all beer sales on a MAT basis



Update
Q4 2022 – 21st March 2023

OFF-TRADE

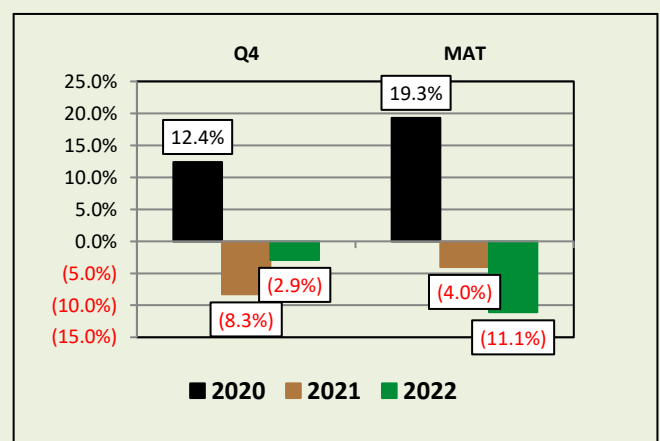


Beer sales in Supermarkets, Convenience Stores & Off-Licenses were down (2.9%) in Q4 2022, taking the MAT to (11.1%), as sales continue to lap lockdown levels.

**Quarter 4
(2.9%)**

**MAT Q4
(11.1%)**

- Beer sales in the **off-trade** were **down (2.9%)** in **Q4 2022**, this follows a decline of (5.0%) in Q3 2022
 - This compares to a decline of (8.3%) in Q4 last year
- This means the **MAT** is currently **declining** at a rate of **(11.1%)**
 - This compares to a MAT of (4.0%) this time last year
- The off-trade is currently **15.74M brls**, which is **58.7%** of all beer sales on a MAT basis



Update
Q4 2022 – 21st March 2023

Source: British Beer & Pub Association

TOTAL TRADE

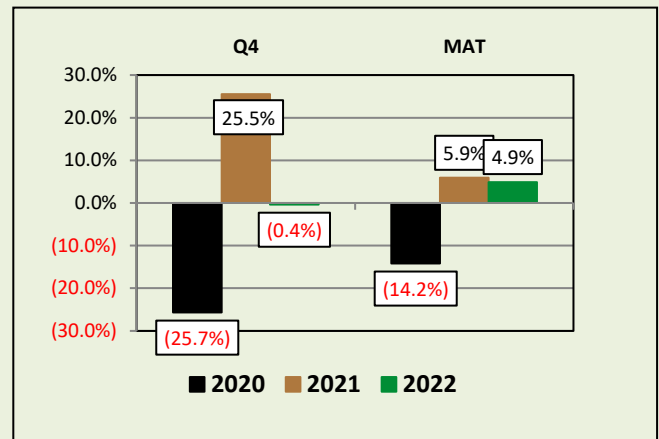


Total beer sales were down **(0.4%)** in Q4 2022, with the MAT in growth of **+4.9%**, as the market continues to find its new norm post covid.

Quarter 4
(0.4%)

MAT Q4
+4.9%

- Total beer sales **declined** in Q4 2022 by **(0.4%)** this follows a decline of **(2.3%)** in Q3 2022
 - This compares to a growth of **+25.5%** in Q4 last year
- This means the **MAT** is currently in **growth** at a rate of **+4.9%**
 - This compares to a MAT which was up **+5.9%** this time last year
- The total UK beer market is currently **26.80M brls**, about **+1,247th brls** more than it was at this time last year



Update
Q4 2022 – 21st March 2023

Source: British Beer & Pub Association

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