

ON-TRADE

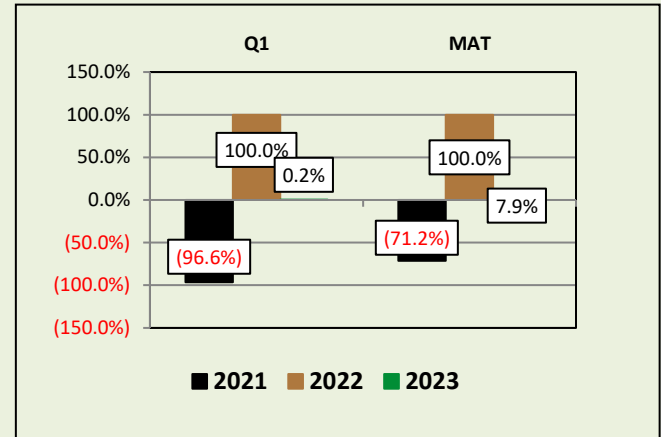


Beer sales in Pubs, Bars & Restaurants were up +0.2% in Q1 2023, taking the MAT to +7.9% – comparisons vs last year are starting to be normalised.

**Quarter 1
+0.2%**

**MAT Q1
+7.9%**

- Beer sales in the **on-trade** were **up +0.2%** in **Q1 2023**, this follows a growth of +3.9% in Q4 2022
 - This compares to a growth of +100.0% in Q1 last year
- This means the **MAT** is currently **growing** by +7.9%
 - Compares to a MAT growth of +100.0% this time last year
- The on-trade is currently **11.07M brls**, which is **41.2%** of all beer sales on a MAT basis



Update
Q1 2023 – 23rd May 2023

OFF-TRADE

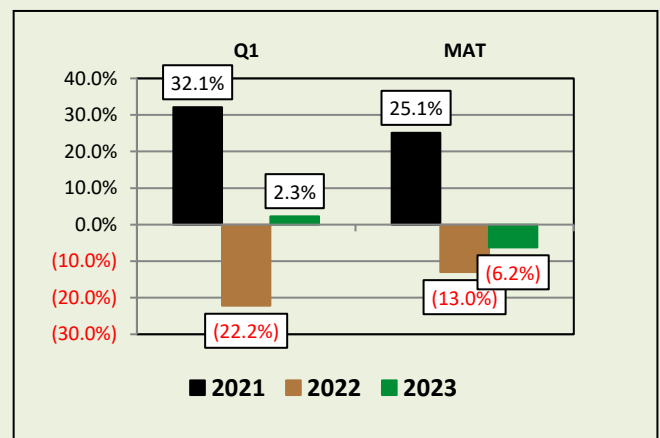


Beer sales in Supermarkets, Convenience Stores & Off-Licenses were up +2.3% in Q1 2023, taking the MAT to (6.2%), as MAT sales continue to lap lockdown levels.

**Quarter 1
+2.3%**

**MAT Q1
(6.2%)**

- Beer sales in the **off-trade** were **up +2.3%** in **Q1 2023**, this follows a decline of (2.9%) in Q4 2022
 - This compares to a decline of (22.2%) in Q1 last year
- This means the **MAT** is currently **declining** at a rate of **(6.2%)**
 - This compares to a MAT of (13.0%) this time last year
- The off-trade is currently **15.81M brls**, which is **58.8%** of all beer sales on a MAT basis



Update
Q1 2023 – 23rd May 2023

Source: British Beer & Pub Association

TOTAL TRADE

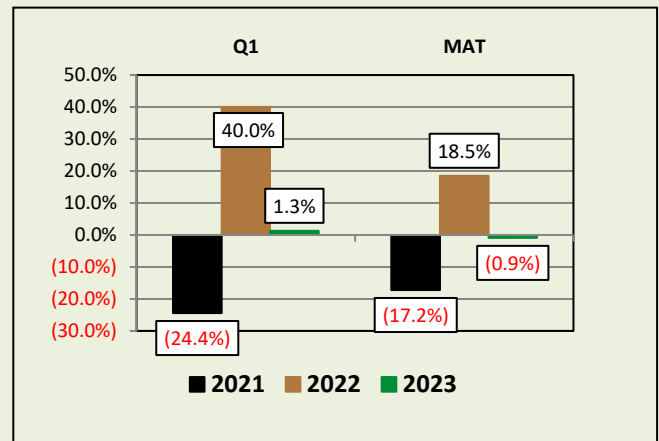


Total beer sales were up **+1.3%** in Q1 2023, with the MAT in decline of **(0.9%)**, driven by lower sales in the off-trade.

Quarter 1
+1.3%

MAT Q1
(0.9%)

- Total beer sales grew in Q1 2023 by **+1.3%** this follows a decline of **(0.4%)** in Q4 2022
 - This compares to a growth of **+40.0%** in Q1 last year
- This means the MAT is currently in **decline** at a rate of **(0.9%)**
 - This compares to a MAT which was up **+18.5%** this time last year
- The total UK beer market is currently **26.87M brls**, about **(242th)** brls less than it was at this time last year



Update
Q1 2023 – 23rd May 2023

Source: British Beer & Pub Association

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