

ON-TRADE

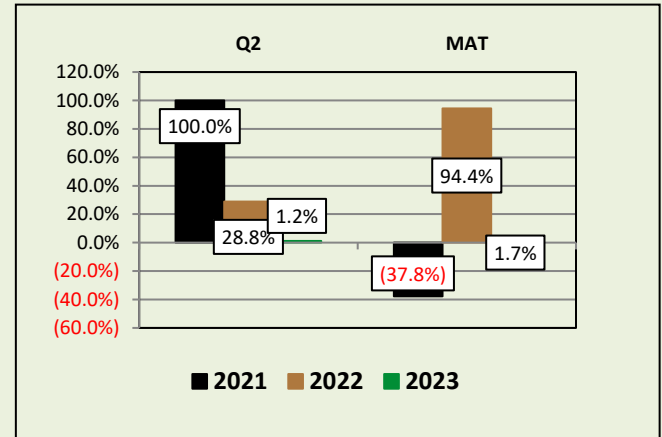


Beer sales in Pubs, Bars & Restaurants were up +1.2% in Q2 2023, taking the MAT to +1.7% –comparisons vs last year are starting to be normalize.

**Quarter 2
+1.2%**

**MAT Q2
+1.7%**

- Beer sales in the **on-trade** were **up +1.2%** in **Q2 2023**, this follows a growth of +0.2% in Q1 2023
 - This compares to a growth of +28.8% in Q2 last year
- This means the **MAT** is currently **growing by +1.7%**
 - Compares to a MAT growth of +94.4% this time last year
- The on-trade is currently **11.10M brls**, which is **41.2%** of all beer sales on a MAT basis



Update
Q2 2023 – 31st August 2023

OFF-TRADE

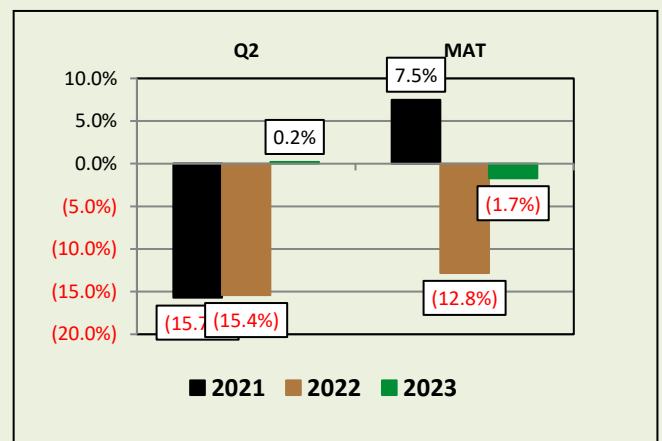


Beer sales in Supermarkets, Convenience Stores & Off-Licenses were up +0.2% in Q2 2023, taking the MAT to (1.7%), as MAT sales continue to lap lockdown levels.

**Quarter 2
+0.2%**

**MAT Q2
(1.7%)**

- Beer sales in the **off-trade** were **up +0.2%** in **Q2 2023**, this follows a growth of +2.3% in Q1 2023
 - This compares to a decline of (15.4%) in Q2 last year
- This means the **MAT** is currently **declining** at a rate of **(1.7%)**
 - This compares to a MAT of (12.8%) 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
Q2 2023 – 31st August 2023

Source: British Beer & Pub Association

TOTAL TRADE

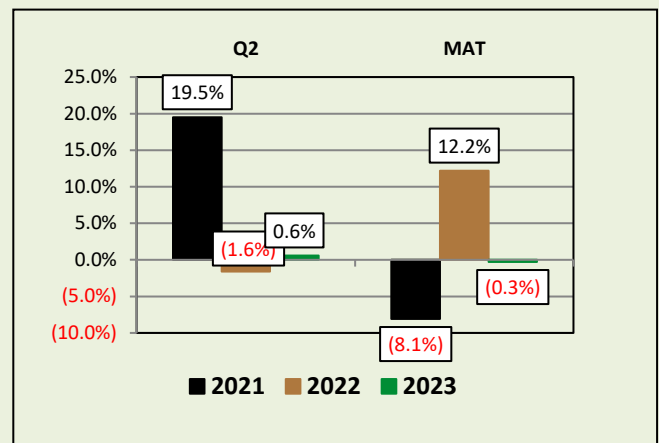


Total beer sales were up **+0.6%** in Q2 2023, with the MAT in decline of **(0.3%)**, driven by lower sales in the off-trade.

Quarter 2
+0.6%

MAT Q2
(0.3%)

- Total beer sales grew in Q2 2023 by **+0.6%** this follows a growth of **+1.3%** in Q1 2023
 - This compares to a decline of **(1.6%)** in Q2 last year
- This means the MAT is currently in **decline** at a rate of **(0.3%)**
 - This compares to a MAT which was up **+12.2%** this time last year
- The total UK beer market is currently **26.91M brls**, about **(83th)** brls less than it was at this time last year



Update
Q2 2023 – 31st August 2023

Source: British Beer & Pub Association

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