



FOOD AND BEVERAGES SERVICES INDEX

THIRD QUARTER (Q3) 2020

Department of Statistics
Department of Economic Planning and Statistics
Minister of Finance and Economy
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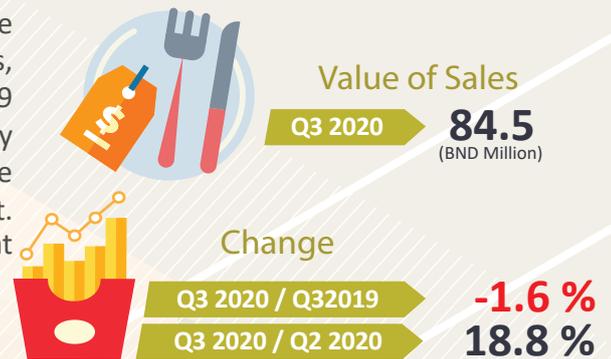
FOOD AND BEVERAGES SERVICES INDEX

3rd QUARTER 2020



Highlights

In the third quarter (Q3) 2020, Food & Beverages Services recorded a decline of 1.6 per cent year-on-year compared to Q3 2019. The decrease was attributed to declines in income of Restaurants, Fast-food Outlets and Other Food Services Activities. The Covid-19 de-escalation stage allowing 100% dine-in at all food premises only started in late July 2020. But compared to the previous quarter, the Food & Beverages services increased by 18.8 per cent. The total value of Food & Beverages Services was estimated at BND84.5 million in Q3 2020.



Year-On-Year nominal change

The sales revenue of Food & Beverages Services has decreased by 1.6 per cent in Q3 2020 compared to Q3 2019. The decrease was attributed to decreases in revenue of Restaurants activity; Fast-food Outlets activity; and Other Food Services Activities.

However, Beverage Serving Activities recorded a positive growth of 75.3 per cent due to the increasing demand of these counter-service drinks compared to same quarter last year.



Quarter-On-Quarter nominal change

Comparing to the second quarter of 2020, sales revenue of Food & Beverages Services has increased by 18.8 per cent in Q3 2020. The increase was due to increases in revenue of Restaurants; Fast-food Outlets; Beverage Serving Activities; and Other Food Services Activities.

Value of Sales and Percentage Change by Activities (2017 = 100)

ACTIVITY	Q3 2020 INDEX (2017 = 100)	VALUE OF SALE Q3 2020 BND Million	PERCENTAGE CHANGE	
			Q3 2020 vs Q2 2020	Q3 2020 vs Q3 2019
1. Restaurants	100.9	61.9	24.0	(0.8)
2. Fast-food outlets	124.4	17.8	3.5	(1.5)
3. Beverage serving activities	163.5	1.8	26.1	75.3
4. Other food service activities	77.9	3.0	16.7	(31.4)
TOTAL	104.9	84.5	18.8	(1.6)

TECHNICAL NOTES



Introduction

Food & Beverages Services refer to business activities related to food & beverages serving activities providing complete meals or drinks fit for immediate consumption, whether traditional, self-service or take-away restaurants. Food & Beverages Services is one of the important sectors that contributes to Brunei Darussalam's economy, accounting for nearly 11 per cent of the number of enterprises; employing around 9 per cent of the workforce; and generating about 2 per cent of the total operating revenue of the private sector in 2017.

The Food & Beverages Services Index (F&BSI) measures the movements of food & beverages services activities. It serves as a leading economic indicator of the food & beverages services performance as well as consumer spending behavior.

Scope and coverage

The Food & Beverages Services activities are classified accordance with the 'Brunei Darussalam Standard Industrial Classification (BDSIC) 2011' which is based on the United Nation's 'International Standard Industrial Classification (ISIC), revision 4'.

Group	Business Group Description
56	FOOD AND BEVERAGE SERVICES ACTIVITIES
561	Restaurants and mobile food services activities
562	Event catering and other food services activities
563	Beverage serving activities



Data Sources

F&BSI is compiled using data from the Quarterly Survey of Businesses (QSB) conducted by the Department of Economic Planning and Statistics (JPES) every quarter. A sample of 97 enterprises are covered in the QSB for retail trade activities.

The weight for each activity reflects its relative importance in the overall food and beverage services sector. The weights are computed based on the food and beverage services of each activity obtained from the Annual Census of Enterprises (ACE) for reference year 2017.

Index Compilation

The overall F&BSI is a weighted average of indices at the detailed activity level. The sales index at the activity level is derived by aggregating the sales value of enterprises belonging to the same activity and dividing it by the average quarterly sales for the same activity in the base year (2017). The overall F&BSI is then computed by summing all the weighted activities indices using the Laspeyres formula.

The indices are based on sales values at current prices. Hence the changes in the value indices may be due to changes in both price and quantity. The indices are also not seasonally adjusted.

Revision Policy

Revisions will only be made to the published figures for the previous periods if there are any changes based on the latest available data.

Annex 1: Quarterly Food & Beverages Services Index (2017 = 100)

No.	Description	Weights	2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020 ^r	Q3 2020
1	Restaurants	7,605	100.0	101.2	96.6	101.1	103.0	101.7	95.8	101.7	101.2	99.7	81.4	100.9
2	Fast-food outlets	1,777	100.0	103.8	105.3	110.9	118.2	117.8	119.9	126.3	131.6	128.6	120.2	124.4
3	Beverage serving activities	138	100.0	94.1	96.9	94.3	95.0	93.1	96.0	93.2	94.5	118.3	129.6	163.5
4	Other food service activities	480	100.0	110.8	97.3	106.4	110.9	110.4	108.1	113.5	113.5	104.3	66.7	77.9
	Total	10,000	100.0	102.1	98.2	103.0	105.9	104.9	100.7	106.5	107.1	105.3	88.3	104.9

Annex 2: Quarterly Food & Beverages Services Estimated Value of Sales (BND Million)

No.	Description	Weights	2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020
1	Restaurants	7,605	61.3	62.1	59.2	62.0	63.1	62.4	58.7	62.3	62.0	61.1	49.9	61.9
2	Fast-food outlets	1,777	14.3	14.9	15.1	15.9	16.9	16.9	17.2	18.1	18.9	18.4	17.2	17.8
3	Beverage serving activities	138	1.1	1.0	1.1	1.0	1.1	1.0	1.1	1.0	1.0	1.3	1.4	1.8
4	Other food service activities	480	3.9	4.3	3.8	4.1	4.3	4.3	4.2	4.4	4.4	4.0	2.6	3.0
	Total	10,000	80.6	82.3	79.1	83.0	85.4	84.5	81.1	85.9	86.3	84.9	71.1	84.5

Annex 3: Year-On-Year Growth Rate of Quarterly Food & Beverages Services Index (2017 = 100) (Per cent %)

No.	Description	Weights	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020 ^r	Q3 2020
1	Restaurants	7,605	0.5	(0.9)	0.6	(1.7)	(2.0)	(15.0)	(0.8)
2	Fast-food outlets	1,777	13.5	13.9	13.9	11.4	9.1	0.2	(1.5)
3	Beverage serving activities	138	(1.1)	(1.0)	(1.1)	(0.6)	27.2	35.0	75.3
4	Other food service activities	480	(0.3)	11.1	6.6	2.3	(5.6)	(38.3)	(31.4)
	Total	10,000	2.8	2.5	3.4	1.1	0.4	(12.3)	(1.6)

Annex 4: Quarter-On-Quarter Growth Rate of Quarterly Food & Beverages Services Index (2017 = 100) (Per cent %)

No.	Description	Weights	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020 ^r	Q3 2020
1	Restaurants	7,605	1.2	(4.6)	4.6	1.8	(1.2)	(5.9)	6.2	(0.5)	(1.5)	(18.3)	24.0
2	Fast-food outlets	1,777	3.8	1.4	5.4	6.5	(0.3)	1.8	5.4	4.2	(2.3)	(6.6)	3.5
3	Beverage serving activities	138	(5.9)	3.0	(2.7)	0.7	(2.1)	3.1	(2.9)	1.3	25.3	9.5	26.1
4	Other food service activities	480	10.8	(12.2)	9.4	4.2	(0.4)	(2.1)	5.0	0.0	(8.1)	(36.0)	16.7
	Total	10,000	2.1	(3.8)	4.9	2.8	(1.0)	(4.0)	5.8	0.6	(1.7)	(16.2)	18.8