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978-0-521-07017-1 - The British Brewing Industry, 1830-1980

T. R. Gourvish and R. G. Wilson

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No industry provides more household names than brewing; none retains a firmer place in British culture; and at the height of the temperance movement none was more controversial. Yet this volume provides the first extended account of brewing in the modern period. Thoroughly based upon research in brewing archives, it surveys the industry from 1830 to 1980, tracing its development from one in which there were thousands of firms producing beer to one now dominated by half a dozen large companies. It is an account which carries the reader from the porters, ales and stouts, the vast vats, drays and myriad beer houses of early Victorian England, to the draught lagers, giant fermenters, beer tankers and theme pubs of the late twentieth century.

In this wide-ranging book the authors discuss free trade in beer, the impact of temperance, and the emergence of the great Victorian breweries together with their acquisition of public houses and company status. In the twentieth century, they examine the impact of two World Wars, the movement for improved public houses, the sobriety of the 1920s, and the revolution sweeping the industry since the 1950s. New material is introduced; the different experiences of hundreds of breweries, large and small, are traced across a century and a half. The book will fascinate all those interested in the history of a great traditional industry – beer enthusiasts and professional historians alike.

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THE BRITISH BREWING INDUSTRY

1830–1980



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For D.C.C.

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Preface

In November 1989 the Brewers' Society invited us to write a history of the British brewing industry in the century and a half after 1830. Exactly thirty years earlier, Peter Mathias had produced a widely acclaimed survey of the 1700–1830 period, concentrating particularly upon the great London breweries. Yet no comparable account of the modern (post-1830) industry followed. This remains true despite the general surveys by J. E. Vaizey (1960) and by K. H. Hawkins and C. L. Pass (1979); the industry in Scotland has received fuller treatment from Ian Donnachie (1979).

It was clear from the outset, however, that our volume could not match the detail of Mathias especially in his delineation of the excise and the malt and hops trades. For after 1830 the evidence itself begins to overwhelm. Firms grew in size; the industry generated a mass of statistical material, and company law insisted that those firms which came within its purview in the late nineteenth century kept proper records. And after the 1870s, the specialist brewing journals and financial press provide a wealth of detail, covering every aspect of the trade, to daunt the stoutest researcher. Moreover, the industry itself is difficult to confine since it runs in so many directions. The problem is not simply that until recently it encompassed hundreds of firms of various sizes across Britain, nor that the retailing of beer through scores of thousands of outlets is unusually complex. The industry is pervasive in other respects. In its raw material supplies it possesses close links with agriculture; it has always been conspicuously taxed; and the sale of beer is enmeshed in licensing laws. In all these areas, especially when the temperance storm raged, the industry was forced into the forefront of national politics.

We have tried to keep a balance between these many themes by sticking to the essential developments, economic and social, within the brewing industry itself. It means that some aspects, for example the

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intricacies of the malt trade, receive short shrift. Inevitably, there are some differences of emphasis between Parts I and II, reflecting variations in both the sorts of evidence which have survived and the problems which the industry encountered. Part I, which was written by Richard Wilson, covers the years up to 1914. During that time a wide-ranging industry of many, various-sized breweries had at its head a small number of great brewing partnerships and their successor companies. In contrast, the period of Part II, the responsibility of Terry Gourvish, witnessed remarkable changes in the structure and output of the industry, especially after the Second World War, as numerous businesses disappeared and giant combines emerged.

At the outset, one brewer assured us that in his view there were two difficult things in life which at first sight seemed simple – running a pub and writing a book. The latter task for us was made easier by the vast network of help running across the industry, though this support was never as liquid as our colleagues imagined. The list of names which follows is long and gratifying. We must single out for special thanks the members of our Steering Committee: Sam Whitbread (Chairman), Edward Guinness, Ewart Boddington, Ron Matthews, Donald Coleman and the chief press officer of the Society (Mike Ripley) and its statistician (Chris Thurman). Edward Guinness shared with us his knowledge of the industry and enthusiasm for the project. Donald Coleman combined, with rare skill, sharp criticism and warm friendship. To him, we dedicate our efforts. For two years we had admirable research assistance from Fiona Wood, appropriately a post-graduate student of Peter Mathias. She made the transition from historian of Fenland transport systems to brewing specialist, from vodka-and-tonic drinker to consumer of ‘Young’s *Ordinary*’ with remarkable ease.

The following kindly agreed to be interviewed on their experience in the modern brewing industry: Anthony Avis and Philip Bradfer-Lawrence (Bass Charrington); Charles Bartholomew (Wadworth); Dr Anthony Button (Grand Met); Martin Corke (Greene King); Anthony Fuller (Fuller, Smith & Turner); Trevor Kerslake (Guinness); George King and Charles Ritchie (Maclay); Evadne Lloyd (Flowers, Whitbread); Frank Pike (Hall & Woodhouse); Philip Pope (Eldridge Pope); and John Young (Young’s).

A key group of archivists, dedicated to the history of the industry, gave us unstinted help in our search for material and illustrations: Diana Lay and J. D. Burkett (Bass); Reg Carrington-Porter (Allied); Sue

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The following gave help at many points: Christopher and Jeremy Pope and Douglas Pratt (Eldridge Pope); Fred West, W. Gordon Bertwistle and Rachel Multon (Wadworth); Richard P. Kershaw (Joseph Holt plc); C. A. Sandland and Helen Osborne (Young's Brewery); R. G. Anderson, R. E. Bell and Brian Renwick (Allied); J. E. Chambers, Jim Dickson and Jim Merrington (Scottish & Newcastle); Robin Evans, Sarah Elsom and Alan Bentley (Bass); Chris Butchers and Don Brown (Bass, Cape Hill); Brian Hanks and Liz Gill (Grand Met); Paul Smith and Peter Walsh (Guinness); Patricia Oliver (J. Walter Thompson); John Williams (Bristol Record Office); Colin Waite (Joshua Tetley); Dorothy Sheridan (Tom Harrison Mass-Observation Archive, Sussex University); Louise Wright, Joanna Haskins and Alan Cary (Department of Transport); Joanna Irvin (Walker Art Gallery, Liverpool);

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Generosity was only to be expected in an industry noted for its hospitality and traditions. Nevertheless, we have found it a wonderful source of strength together with the support provided by our families and colleagues. We hope, in spite of errors and omissions, that the result of all this trust will encourage others to appreciate and to research further this great industry. For none is more revealing about British culture, history and attitudes.

T.R.G.
R.G.W.

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Abbreviations

AAS	Annual Abstract of Statistics
Abv	Alcohol by volume
APV	Aluminium Plant and Vessel Co. Ltd
AWP	Amusement with Prizes
blls	barrels
BLPES	British Library of Political and Economic Science, London School of Economics
BM&B	Bass Mitchells & Butlers
BMRB	British Market Research Bureau
Bodd	Boddington Group plc
BRF	Brewing Research Foundation
BS	Brewers' Society
BSWG	Brewing Sector Working Group
B(THB)	Breweries (Truman Hanbury Buxton)
BWTE	Brewers' without Tied Estate
CAMRA	Campaign for Real Ale
CBI	Confederation of British Industry
CIU	Working Men's Clubs and Institute Union
Cd, Cm, Cmd, Cmnd	Command
COBC	Cheltenham Original Brewery Company
Cos. House	Companies House
CSO	Central Statistical Office
DBB	Dictionary of Business Biography
DOR	Defence of the Realm
DTI	Department of Trade and Industry
EC	European Commission
EEC	European Economic Community
EP	Eldridge Pope & Co. plc
FBG	Fosters Brewing Group Ltd

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xxiv	<i>List of abbreviations</i>
FBI	Federation of British Industries
GABBA	Guinness, Allied and Bush Boake Allen
GLC	Greater London Council
GLRO	Greater London Record Office
G Met, Grand Met	Grand Metropolitan
GPR	Guinness Archive, Park Royal, London
GDP	Gross Domestic Product
HGV	Heavy Goods Vehicle
IDV	International Distillers & Vintners Ltd
ICI	Imperial Chemical Industries
ics	in-can system
ICTA	Ind Coope Tetley Ansell
JIB	Journal of the Institute of Brewing
LAB	Low Alcohol Beer
LCC	London County Council
MAFF	Ministry of Agriculture, Fisheries and Food
MC	Monopolies Commission
MMC	Monopolies and Mergers Commission
MO	Tom Harrisson Mass-Observation Archive, Sussex University
MORI	Market Opinion and Research International I
MRC	Modern Records Centre, University of Warw
n.a.	not available
NAB	No Alcohol Beer
NBPI	National Board for Prices and Incomes
NEDO	National Economic Development Office
NTDA	National Trade Defence (Development) Association
<i>Parl. Deb.</i>	<i>Parliamentary Debates</i>
PC	Price Commission
<i>PP</i>	<i>Parliamentary Papers</i>
PRD	Park Royal Department (Guinness)
PRO	Public Record Office
R & D	Research and Development
SBA	Scottish Brewing Archive
SCHC	Select Committee of the House of Commons
SCHL	Select Committee of the House of Lords
S&N	Scottish & Newcastle
SD	Standard Deviation
TFP	Total Factor Productivity

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TGWU	Transport and General Workers' Union
VAT	Value Added Tax
W&Co.	Whitbread & Co. Archive, London
WMTB	Watney Mann & Truman Brewers