

Beer in the UK

A consumer perspective on the real state
of UK brewing and supply of beer
to pubs in 2026

A CAMRA Report



Welcome...

...to CAMRA's first ever report on the state of the UK beer market as experienced by the consumer. This report showcases everything that CAMRA is striving to be: the authoritative voice of beer drinkers and pubgoers, and a champion of independent brewers and consumer choice.

While this report is by consumers and focused on their experience, it doesn't mean it's only for consumers. It's for brewers, publicans, stockists, and the people who guide or make laws, and monitor and regulate markets. It's also for the decision-makers who have the biggest impact on choice, availability and price of beer on the bar. In our opinion, the hard-won reputation of UK brewing has been trashed by big business and is unsupported by Government. If nothing changes, the decline will continue and may become terminal.

This report demonstrates that decline and the impact it is having directly on consumers. CAMRA has and will continue to campaign against what we see as the destruction of quality and choice in British beer and what can be done to save it.

As consumers, we are angry. And that's because we have a lot to be angry about. Evidence in the report shows in clear and compelling words what we've known to be true for a long time.

Global brewers dominate the UK beer market and frequently make decisions that destroy or dismantle our rich brewing heritage. Flooding the market with uniform, dull beers and removing consumer choice, while running multi-million-pound marketing campaigns that trick consumers into thinking they're buying an independently produced beer and not just a brand.

Independent brewers are making some of the most interesting and exciting beers, focusing on high-quality ingredients, reviving traditional styles or exploring new possibilities, but they can't get them onto bars or into shops. They can't compete with the stranglehold that global brewers have on access to market, or their mass marketing campaigns. Consumers want beers from independent brewers but struggle to find them because the big four brewers dominate and dictate the status quo. Ordinary people who like beer are expected to pay up and shut up, accept the illusion of choice, all while successive governments treat beer and pubs as a cash cow.

I hope everyone, from ordinary beer drinkers like me, to the people tasked with monitoring and regulating markets, takes something from this report. It's a testament to the volunteers that have put it together, and we should all raise a pint of (independently brewed) beer to them.



Finally, if this report makes you angry, and you want to do something about it, please join us. Whether that's joining CAMRA as a member or supporting our campaigning or as someone who is passionate about good beer.

Together, we can get the changes we need to make this a market for the beer drinkers, instead of faceless corporations.

Ash Corbett-Collins
CAMRA Chairman



Key points:

- Since 1979 annual beer production in the UK has fallen from 68,900 to 36,100 hectolitres, or 12 billion to 6 billion pints per year, with annual per capita beer consumption falling from 122 to 63 litres, or from 18 to 9.2 pints per month.^(1, 2)
- Yet UK alcohol consumption remains the same today as it was in 1980, when beer made up 65–70% of the alcohol market. Since 2010, its share has hovered around 35–36%.⁽¹⁾ Beer has lost out as those wanting reliably flavourful drinks migrated to wine.
- Until 1990, UK brewing was 96% British-owned. Today over 80% of UK beer is produced by foreign firms. Of this, most comes from four subsidiaries of international corporations⁽³⁾, which have no affinity with Britain's brewing heritage and little reason to export beer brands that they already make in other countries.
- Meeting the consumer demand for more interesting beers is left to smaller independent breweries, but these are routinely excluded from outlets by the practices of the international brewers who distort the beer market by controlling distribution and sales, appearing to act as a "tight oligopoly" – a monopoly in all but name.
- Beer consumers are routinely misled about the origins of their beers. Most big brand 'foreign' lagers are made in the UK, often to diluted recipes; most of the largest 'craft' beer brands are made by corporate producers; and many 'local' beers come from industrial-scale national plants, far from the locality suggested by their names.
- Meanwhile, UK beer lovers must pay far more for beer than those in most other European countries, due to beer taxes that are the highest of any major beer producing nation in Europe. This is a fiscal disincentive to developing beers of character to impress the UK market and boost production for export, which further threatens the viability of many independent breweries.



Proposed solutions:

- If the British brewing industry is to reach its potential for growth, the UK beer market must be freed up for smaller independent producers to have fair access to it, and incentives must be found to develop distinctive British beers for export. This requires **a market investigation from the Competition and Markets Authority**.
- The routine deception of consumers must stop. Beers sold in the UK should **clearly name the company that owns the brand, and the place where it is brewed**, through an industry code of conduct or, failing that, new labelling legislation.
- The UK's abnormally high level of beer taxation, compared to the rest of Europe, needs to be challenged to justify its purpose. **The upcoming review of the 2022 changes to the alcohol duty system is an opportunity to make the UK industry competitive** with other major brewing nations.

The UK brewing industry – an overview

The decline in UK brewing since 1980 is greater than that seen in either of the 20th century's two world wars. Beer's share of the alcoholic beverage market has imploded, coinciding with the industry's reliance on uninspiring big-brand beers, the industry's takeover by large foreign companies with no affinity to Britain's brewing heritage, and the new owners' habit of retaining market share by stealth rather than excellence.



When the downturn began – beer versus wine

In the late 1950s the UK's largest brewers made moves to simplify the profile of beer. They decided to make it a production line drink, employing ever-cheaper techniques to create new, big-brand beers, carefully imaged to appear premium, giving them names like Harp, Skol, Tavern, Tankard, Tartan and Watney's Red.

At that time 90% of beer was sold in pubs or social clubs⁽⁴⁾, most of which were owned by, or contractually tied to the big brewers, so selling the new beer concept to a captive audience was relatively simple.

At roughly the same time, the leaders of Europe's wine industry also modernised their production techniques but took a completely different approach to the quality of their product, and its target market. They celebrated wine's diversity, promoting its different grapes, regions and styles, aiming it at the aspiring post-war generation, whose children – the baby boomers – had started to enjoy holidays abroad.

When UK supermarkets began to stock alcohol, they soon recognised that wine shoppers wanted distinctive flavours, while beer buyers sought familiar names. In the 1970s, wine sales grew by 150%, and beer by just 15%. When restaurants began replacing pubs and clubs, this created a second major market for wine, its sales trebling between 1980 and 2005, this time almost entirely at the expense of beer.⁽¹⁾

International takeovers

A second major factor in beer's decline began in the 1990s, as, firm by firm, the large brewing groups were bought by emerging international, sometimes global brewers, none of which had a significant UK connection.

Until that point the only major 'foreign-owned' brewery in the UK had been the Irish company Guinness. Three-quarters of beer came from six brewers, all of which were, by 2008, in the hands of four large corporations – AB-InBev, Heineken, Carlsberg and Molson Coors. These went on to acquire others, such as Marston's of Burton-on-Trent, Banks's of Wolverhampton, Wells of Bedford and Young's of Wandsworth.

This change of ownership broke UK brewing's connection with its own traditions. As a result, while original British beer styles, such as pale ale and IPA, porter and stout, oak-aged beer and barley wine are now revered around the world by 'craft beer' drinkers, little of that beer is supplied by UK brewers.

The four corporations focus on trying to bolster the flagging market in big-brand international lager, with little visible effort put into producing or developing heritage styles. Far from encouraging the growth of more diverse beers, these are suppressed, leaving the UK with remarkably few well-known beer brands for export.

The UK's residual brewers

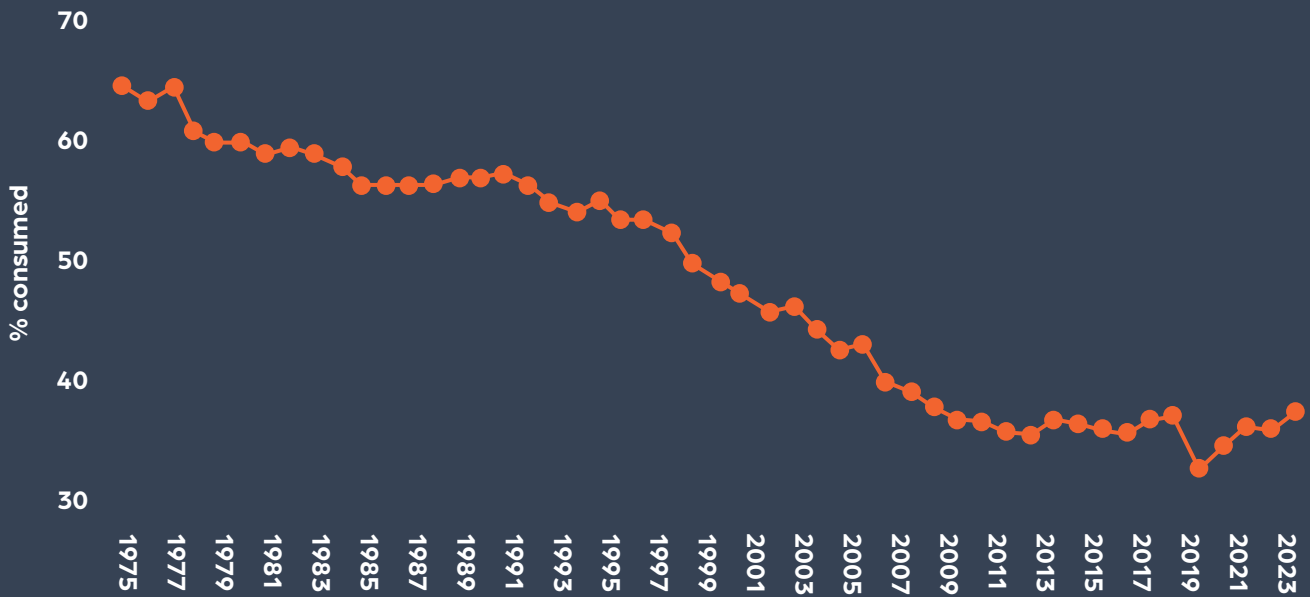
Several other important brewers are also foreign-owned. Greene King is part of a Chinese property firm; Tennent's belongs to an Irish brand brokerage; and Fullers, with others, is owned by the Japanese brewer, Asahi. Barcelona-based Damm brews in Bedford.

The largest British-owned brewer is Guinness, now owned by London-based Diageo, though still seen as Irish. The biggest independent was BrewDog, UK brewing's most significant 21st century success story, until it was bought in March by an American firm, for a knockdown price.

Of the 3,750 or so small independent breweries founded since 1980, fewer than half have survived^(5,6), and their combined share of the UK beer market is only around 7%, despite consumer surveys suggesting this would increase to 20% if retailers were free to buy the beers that their customers prefer.⁽⁷⁾



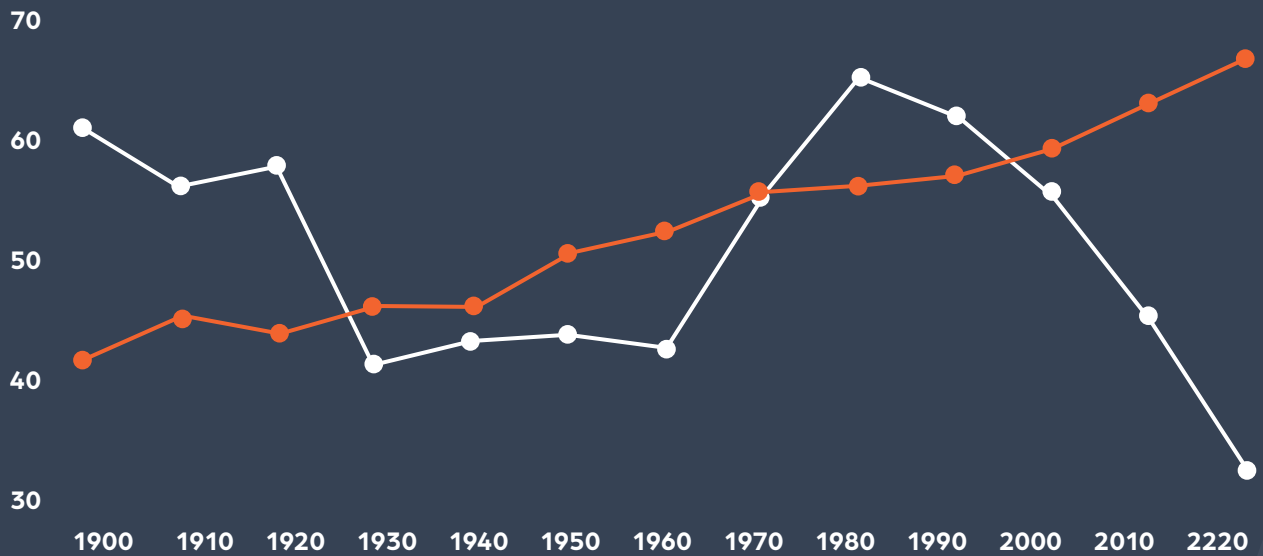
Beer as a proportion of alcohol consumed



Sources: HMRC, National Statistics, BBPA

Beer production vs population

● Thousand hectolitres ● Population (millions)



Sources: BBPA and ONS

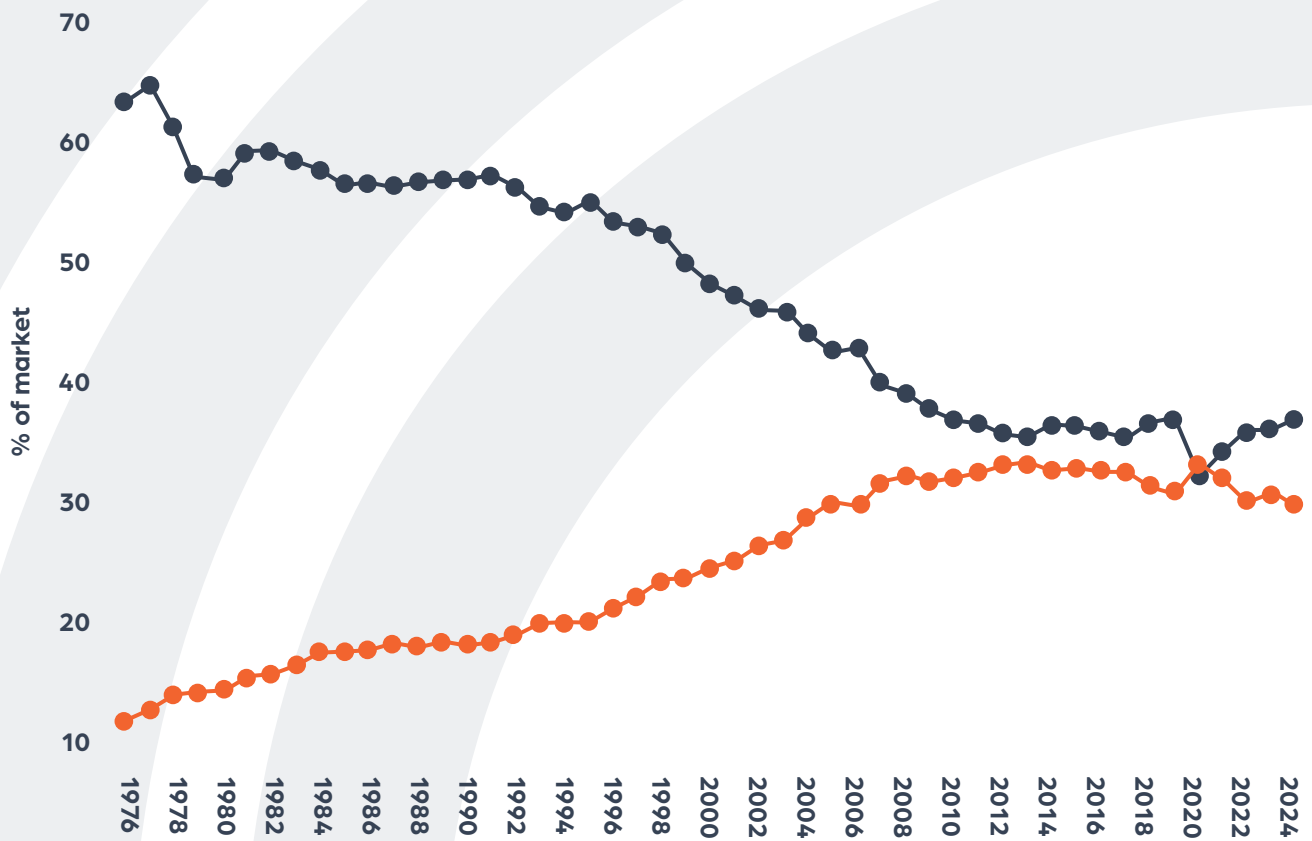
Since the arrival of affordable, well-made wines and uniform, undistinguished beers, British brewing has ceded much of the alcoholic beverage market. During 2020 in the first year of the pandemic, for the first time in history, wine took more of the UK alcohol market than beer.^(6,7)





Beer and wine percentages of the market

● Beer ● Wine



Sources: HMRC, National Statistics, BBPA

Beers for beer lovers

Beer is an enormously diverse drink, ranging in character from wine strength to non-alcoholic, black to straw-coloured, sweet to dry, smooth to crisp, with huge variations in aroma and flavour. Over 200 distinct styles are recognised ^(8,9,10), many with long pedigrees, though most of these are made only by smaller independent breweries.

Following Prohibition, beer in the United States became commoditised, leading to a narrow range of typically blond and frothy-topped beers being made on an industrial scale. Most other countries followed suit and by 1975, only four continued to have a significant heritage brewing sector: Germany, Belgium, Czechoslovakia and the UK.

The last quarter of the 20th century saw consumers kick back against standardisation with the rise of CAMRA in the UK, a homebrewing and microbrewery movement in the US, and the emergence of national beer consumer groups across Europe. Craft and heritage beer styles have since spread to over a hundred countries.

As a result, the world now has 30,000 smaller independent breweries, with 10,000 in Europe and 1,600 in the UK,⁽²⁾ though despite this, 87% of the world's beer comes from just forty companies, and more than half from the four that operate Britain's largest brewers.⁽¹¹⁾



Exerting control over the market

In the UK, the four multinational subsidiary companies produce nearly 70% of UK-brewed beer.⁽³⁾ Their brands dominate our pubs and bars, as well as supermarkets and other off-trade outlets. They achieve market dominance not by the excellence of their beers but by a network of interconnected practices that shape the industry's structure, strategies and policies.

Their principal brands are production line lagers of similar appearance and style, with the brands boxing and coxing with each other for a share of the declining market in such beers. Most are marketed as if they are 'foreign', despite being UK-made, often to recipes that are tweaked to include a higher water content. The companies' few remaining cask and bottled beer brands are often sold as if produced in a particular locality, or else to small-batch or 'craft' specifications, when typically, they are neither.

Yet the routinely misleading nature of their products' provenance is not the biggest problem inhibiting the growth of UK brewing. Careful analysis of the industry reveals structural issues and anti-competitive practices that account far better for beer's consistent failure in the alcoholic beverage market in recent decades.

Critically, artificial barriers have been constructed that leave independent local and regional producers excluded, in effect, from large parts of the UK beer market, in particular the on-trade. These include, but are not limited to, controls on the range of beers that a licensee is contractually allowed to source at a competitive price, and the draught beers they are allowed to sell through their dispense equipment.

Alternatives to inefficiency

CAMRA sees the brewing industry's failure to retain its share of the UK's alcoholic beverage market as testament to its collective inefficiency. The bigger players' emphasis on limiting the prospects of smaller firms in the market not only denies consumers the choices they seek, but it also takes away the need to rise to the challenges of serving the market better.

Put more simply, one principal reason that beer sales have plummeted is that the four large brewing corporations have concentrated on producing beers that suit their business model more than the beer consumer.

The interconnected network of beer supply chain actors, products and services (see 'Understanding how the beer trade works', below) creates network effects across the whole beer market, leading to a reduction in effective competition. These are compounded by common pricing practices and, in turn, result in higher prices and reduced concern for consumers. For example, through the practices of 'double marginalisation' and 'full-line forcing'.

Double marginalisation occurs when two or more firms, with market power in a supply chain, apply their own 'mark-up'. This creates a higher price for the consumer than it would be the case in a fully competitive market, making the industry less efficient by reducing outputs at the same time.

Full-line forcing is when a supplier effectively forces a retailer to offer only products from their range. Where this is backed up by exclusive supply and distribution agreements, and other contractual restrictions, this will exacerbate the double marginalisation effect. Both double marginalisation and line-forcing are commonplace in the UK beer industry.

To get an idea of the extent of the problem, official industry data ^(12,13) describe around 40% of pubs as "independent and free of tie", giving the impression that their licensees are free to order the beers they choose. However, CAMRA's pub database, which is the most comprehensive qualitative pub database in the UK compiled from a consumer perspective, indicates that fewer than a quarter of these 'independent' pubs seem able to exert any such degree of freedom. The other categories of pub, described as managed, tenanted or franchised, are generally even more likely to have contractual restrictions on what beers they can sell.

The OECD stated in 2025 that, "Well-functioning markets are crucial for economic growth and stability".⁽¹⁴⁾ A more competitive and better functioning beer market would promote enhanced efficiency, encourage market innovation, and make for better use of resources. From its consumer perspective, CAMRA would add that the measures needed to improve competition and efficiency will inevitably be good for consumer choice.



Understanding how the UK beer trade works

The term 'on-trade' refers to places that are licensed to serve alcohol for consumption on their premises. Its largest part remains the pub trade, though nightclubs, members' clubs, hotels, restaurants and others are also included.

A majority of pubs are owned by property companies, known collectively as 'pubcos' (pub companies). Some have only a handful of outlets, while the largest has accumulated over 4,000. Most have contractual agreements with one or more of the four corporations, which lead them frequently to limit the beers they supply to their pubs. If one of the company's licensees wishes to stock a beer from an independent brewer, they will often find they are either not allowed to do so, or they must pay a significant premium. This distorts the beer market.

Separately from this, many premises have service contracts for the maintenance and upkeep of draught beer lines, which often include a restriction on the beers that may be served through those lines, or the imposition of an exorbitant 'connection' fee to allow an independent brewer's beer to be served through them. One such company, Inserve Ltd, stated on its website in December 2025 ⁽¹⁵⁾ that it provided equipment and services to over 90,000 outlets in the UK, from a generally agreed total of around 105,000. It is largely co-owned by Heineken and Carlsberg. Where such deals include the practice of full-line forcing, this distorts the beer market.

In the case of Carlsberg, the scope for leveraging further restrictions on customers would rise, were they to use their acquisition of the Britvic portfolio of soft drinks brands to incentivise line ties.

The relatively small number of pubs that are not subject to a pubco tie, or a restrictive line-servicing agreement, often rely on wholesalers for their beer supply. While many of these companies are technically independent traders, most carry a range of beers that is shaped by contractual arrangements with the four corporations. Where it occurs, this can also distort the beer market.

There is a particular problem with the UK on-trade, where more open competition is needed to ensure adequate supply of a wide choice of quality beers, available to serve consumer preferences. The case today is that consumers are presented with a limited range of beers, predominately provided by the four large brewers, amounting, in reality, to a curated selection of brands that give an illusion of choice (see 'The myth of choice and misleading provenance' below).

CAMRA believes that a formal analysis of the market, by competition authorities, is urgently needed to examine the combined effects of these practices on the competitive supply and distribution of beer to the market, particularly the on-trade sector.



The importance of the off-trade

Historically, most UK beer was sold in the on-trade, so much so that the brewing and pub trades were seen as wings of the same industry. This is no longer the case.

Between 1980 and 2025, beer sales migrated from on- to off-sales, at a steady rate of 1% per year. From serving 90% of the beer market for decades, the on-trade now accounts for just over 40%. The rest is sold mostly for home consumption.^(1,2)

The off-trade beer market is made up of supermarkets and general stores; specialist off-licences; and home delivery services, some operated by breweries. Most off-licences and specialist beer outlets are part of regional or national chains, with few independently owned. Supermarkets account for the bulk of off-trade sales, between them selling more beer than the whole UK pub estate. The national chains and supermarkets are almost invariably contracted to the four corporations, which distorts the off-trade beer market.

We harbour considerable concerns about anti-competitive practices in the off-trade beer market. Between 2000 and 2024 on-trade beer prices increased by 118%, slightly above the Retail Price Index, while off-trade beer prices rose by only 27%, the increases often being applied to the same brand.⁽¹⁴⁾ This implies that aggressive discounting is occurring in the off-trade, at the expense of sales to the on-trade. The increased price differential that occurs as a result, further damages the pub trade, which already has multiple cost challenges.

We note also that this would have a similar effect on excluding smaller companies from the off-trade market.

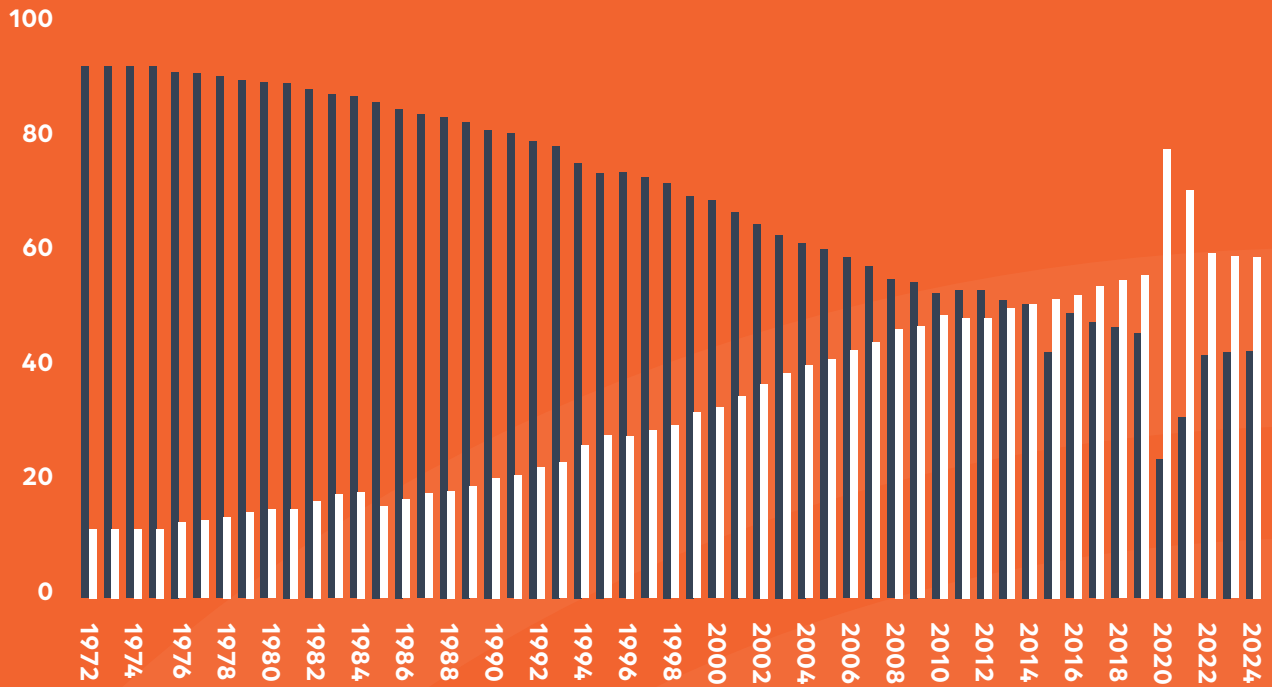


Saturday.



On vs Off Sales (UK)

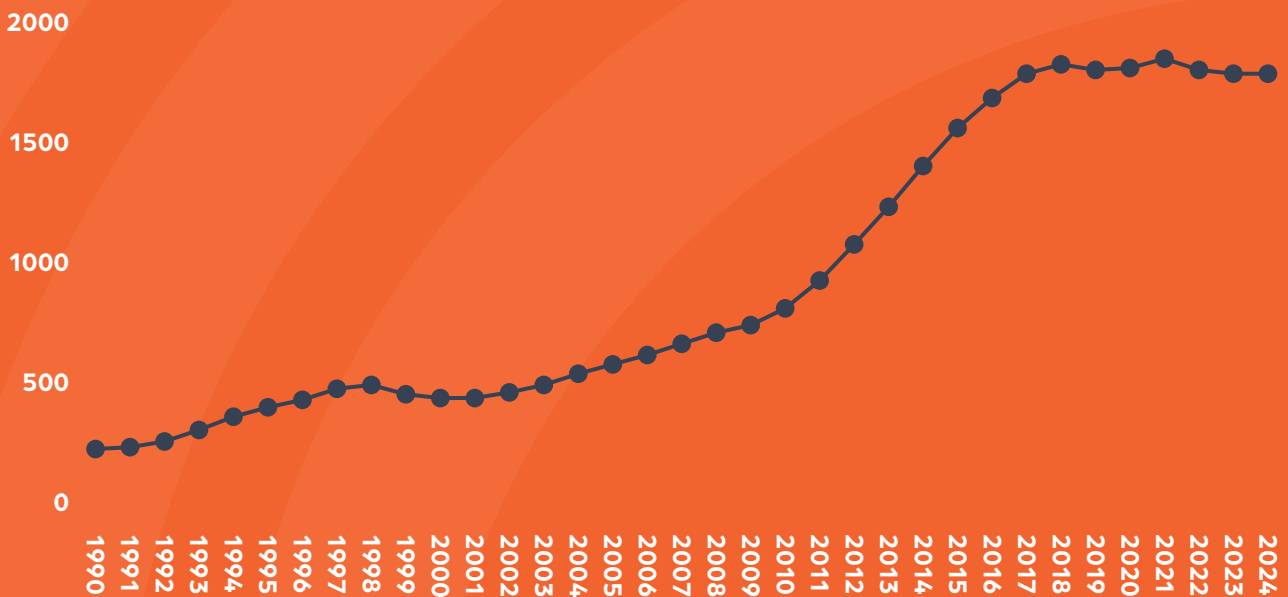
● % On Trade ● % Off Trade



Source: BBPA

In parallel with beer's loss of its share of the UK alcoholic beverage market,⁽¹⁾ sales of beer have shifted from the social setting of the pub to drinking at home.^(1,2)

UK breweries in production



Sources: HMRC, National Statistics, BBPA

Of the 3,730 breweries known to have opened since 1980, fewer than 1,700 are still in production.^(5,6) Despite the high number of start-ups, these small independent firms share only around 7% of the total UK beer market.

The myth of choice and misleading provenance

The range of beers available in the UK, from home and abroad, appears, on the surface, to offer a glittering array of choice. However, after removing the glittery packaging, skilfully applied by marketeers, the real state of choice is less colourful.

Over three-quarters of the beer drunk in Britain is lager, most of it blond and brewed to a narrow range of styles, usually on an industrial scale. All the leading brands produced are owned by the four large corporations. Most of these are projected, through words and images, as being from abroad.

Our research suggests that the following lager brands are all produced in the UK, with many but not all, simplified to meet UK specifications, usually meaning lower strength:

Amstel	Asahi	Becks	Brooklyn
Bud Light	Budweiser	Carling	Carlsberg
Cobra	Coors	Corona	Cruzcampo
Estrella Damm	Fosters	Heineken	Holsten
Kingfisher	Kirin	Kronenbourg	Madri
Mahou	Miller	Molson	Moretti
Poretti	Pravha	Red Stripe	San Miguel
Singha	Skol	Sol	Staropramen
Stella Artois	Tiger	Tuborg	Via Roma

Additionally, some imported beers, while genuinely brewed abroad, have been reported as produced in a diluted strength for the UK, including Estrella Galicia, Grolsch, Rosa Blanca and Super Bock.⁽¹⁶⁾

The traditional 'ale' brands produced by the four corporations read like a roll call of famous British brewing names, though their breweries of origin are wholly owned subsidiaries or defunct, with the beers now brewed elsewhere:

Banks's	Bass	Beavertown	Boddingtons
Brakspear	Courage	Doom Bar	Eagle
Hancock's	Hobgoblin	John Smith's	Manns
Mansfield	Marston's	McEwan's	Newcastle Brown
Ringwood	Sharp's	Stone's	Tetley's
Wainwright	Worthington	Wychwood	Young's

A third form of misrepresentation is the portrayal of brands from large corporations as 'craft beers', a claim that would not be allowed in most other countries. For example:

Beavertown (Heineken)	Blue Moon (Molson Coors)
Brixton (Carlsberg)	Brooklyn (Carlsberg)
Camden Town (AB InBev)	Gamma Ray (Heineken)
Goose Island (AB InBev)	Lagunitas (Heineken)
Neck Oil (Heineken)	Shipyard IPA (Carlsberg)

In the past year, Carlsberg has even taken to serving keg beers as if they were cask, through a plinth-mounted handpull, to quote its promotional materials, because of the "all-important handpull theatre and serve". As a result of all these practices, the UK brewing industry is once more developing an unenviable reputation for routinely misleading its domestic consumers, another factor that mitigates against British success in the export market.

The export problem

Since Brexit, the UK's beer exports have been made up largely of big brand beers, produced in many other countries, being sent to Ireland or elsewhere in the European Union, because of historic supply agreements, temporary shortages, or unplanned surpluses.

The export of beers from most smaller UK producers has fallen away, due to an exponential increase in the volume and complexity of paperwork associated with customs regulations, and the subsequent unwillingness of transport companies to carry high-risk loads of perishable beer, for fear that faulty or incomplete paperwork will delay, and thereby spoil the stock.



Photo courtesy of © Matthew Curtis

The end result is that while Britain's historic beer styles are highly regarded internationally, sales of these beers in overseas markets come from suppliers based outside the UK, in countries where innovation and growth in the independent brewing sector are still encouraged.

Advertencia: elaborada en Gran Bretaña
Varování: vařeno v Británii
Achtung: in Großbritannien gebraut
Attenzione: prodotta in Gran Bretagna
Advarsel: brygget i Storbritannien
Waarschuwing: gebrouwen in Groot-Brittannië
Attention : brassé en Grande-Bretagne
Ostrzeżenie: warzone w Wielkiej Brytanii
警告: 英国で醸造

(Spanish)
(Czech)
(German)
(Italian)
(Danish)
(Dutch)
(French)
(Polish)
(Japanese)



The UK's absurdly high beer taxes

The direct taxes on beer production are excise duty and sales tax (VAT). Each of these raises £3.5 to 4 billion of revenue per year.⁽¹⁷⁾ VAT is not only applied to the cost of the beer but also to its excise, making it a tax on a tax.

Europe's other traditional beer-brewing nations are Germany, Belgium, the Czech Republic, the Netherlands, Denmark, Austria, Ireland, Poland and Spain. On average, these take one-tenth the amount of beer tax.⁽²⁾ They have:

- Total population ± 230 million people – roughly 3.5 times that of the UK
- Total beer production ± 25 billion litres – over seven times that of the UK
- Combined excise take from beer ± € 3300 million – 25% less than the UK

Throughout the time of the UK's membership of the European Union (1974–2020), the amount of excise raised from beer in all these countries combined, was less than that of the UK alone.

Among the most important beer-producing nations in Europe, only the UK and Ireland tax beer highly, the latter having inherited the British habit on independence in 1921.

When corrected for average income and local rates of VAT, only Norway, Finland and Iceland tax beer at a higher rate than the UK.

Unintended consequences

As a general rule, the beers best suited to the export trade are either typical or exceptional examples of a particular national beer style, or else beers of more robust character. One subtle side-effect of taxing beers excessively in their home market is that these more distinctive brands tend to become particularly expensive, thereby reducing the exposure they enjoy, and limiting their chances of deserved fame.

Additionally, excessive tax on beer is a persistent factor in the already high and increasing costs of running pubs and other venues for social drinking. This is an important factor in driving the move towards purchases in the off-trade.

Home consumption lacks the social safeguards of drinking in community settings, such as pubs and members' clubs, and the growth in off-sales has been cited as a potential factor behind rises in alcohol-related harm, which was particularly noticeable during the UK's national lockdowns in response to the COVID pandemic. During that time, overall alcohol consumption fell marginally but the reported rate of acute illnesses directly related to alcohol intoxication rose significantly.

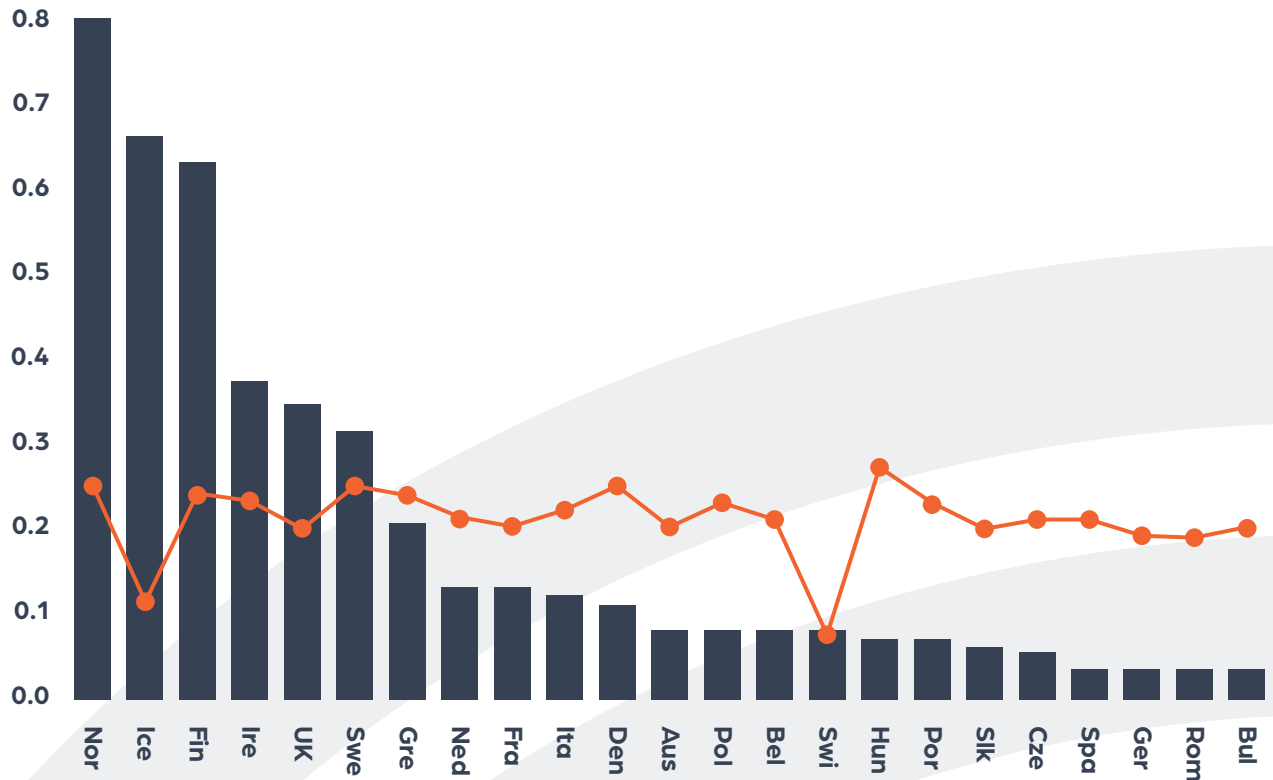
The high level of beer taxes in the UK impacts particularly strongly in the UK pub trade, which has been hit by numerous hikes in other forms of taxation in the past year. CAMRA wants the Government to increase the duty differential between beer destined for the on-trade and for supermarkets.

We also call for a fundamental review of the rationale behind beer taxation, and what it is intended to achieve.



Beer tax rates across Europe Excise in € per 33cl of 5% ABV beer – VAT 0.2 = 20%

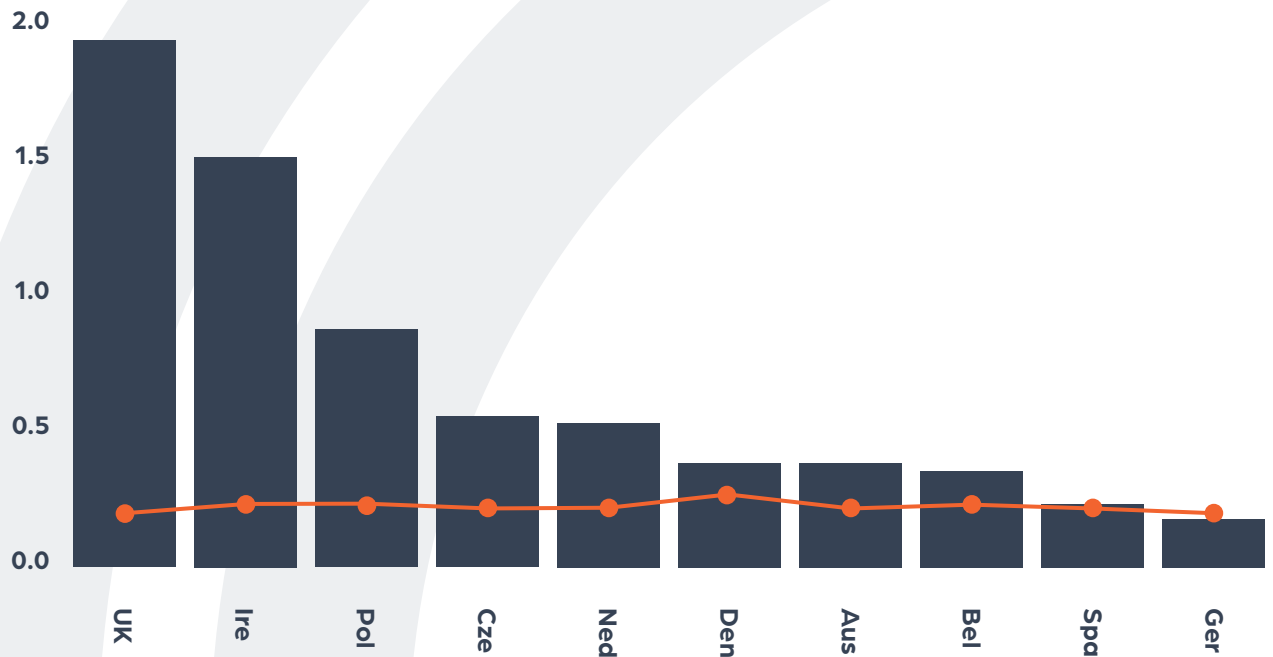
● Duty on 33cl of 5% beer ● VAT on beer



The UK has the fourth highest beer taxes in Europe, after the high-wage economies of Norway, Iceland and Finland. Although on a par with Ireland, when corrected for average income, UK beer tax is 20% higher. The UK and Ireland are the only major brewing nations to impose excessive taxes on brewing beer.^(18, 19)

Beer taxes in major nations Ratios corrector for average income

● Excise ratio corrected for income ● VAT on beer





Brewers without breweries

In addition to the mistrust generated by mislabelling British-made lagers as foreign, ascribing beers to breweries or regions with which they have no living connection, passing off industrial beers as 'craft', and keg beers as hand pulled, a fifth challenge to the provenance of a beer is emerging, across brewery companies of all sizes. This is the issue of "breweries" that do not brew, but have others brew for them.

This is not a simple issue, as these arrangements take many forms. This may be as simple as a stopgap arrangement when a brewery is overloaded or being renovated, and a neighbouring brewery helps out for a time; or a means by which a start-up brewer may minimise costs by hiring and operating another firm's brewery for a day, gaining useful practical experience in the process.

However, at the other end of the spectrum are marketing firms that buy existing beers, relabel them (sometimes with minor tweaks) then market them as if their own creation, misrepresenting themselves as brewers in the process. A variant on this is the company that acquires a heritage brand name from its owner and proceeds to produce or commission a beer of that name, produced with little or no reference to the heritage product. As far as the consumer is concerned, this is misrepresentation.

In between are "fig leaf brewers", who brew a tiny proportion of their beers themselves, while commissioning others to produce the bulk of them.

In principle, CAMRA does not object to companies collaborating to produce a beer and bring it to market. However, where a beer appears to come from one brewery but is in practice made by another, we believe this should be stated on the label. Knowing where a beer has come from is as important, in our view, as knowing its style, its alcohol content and its price.

CAMRA believes this problem is so widespread that legislation about beer provenance is required, though we accept that agreeing an honourable trade-wide code of conduct to deal with imaging British-made lagers as 'foreign', centrally produced beers as 'local', corporate brands as 'craft', and commissioned beers as 'own brews' may help.

CAMRA's policy on provenance of beer and labelling

A company that does not brew beer should not refer to itself as a brewery or portray itself in marketing materials as a beer producer.

At point of sale all beers should declare their brewery of origin, its location and the brand ownership.

Any beer that is an existing brand with minimal or no changes should state the name of the base beer on the label.

The case for government action

Community value of beer and pubs

The community and social value of pubs and social clubs is well documented and has been recognised by successive governments.

Their role in tackling social isolation and loneliness is recognised in the Loneliness Strategy,⁽²⁰⁾ and research commissioned by CAMRA from Oxford University found that people who have a 'local' have more friends and feel more connected to their local community than those who don't.⁽²¹⁾ Just last year, Pub is the Hub released research measuring the social value of pubs to communities.⁽²²⁾

Community pub ownership and diversification to offer local services has greatly increased over the last decade, encouraged by government funding streams and most recently the English Devolution and Community Empowerment Act.⁽²³⁾

In the context of the cost-of-living crisis, the role of pubs and social clubs in their communities is more important than ever. Many pubs offer low-cost or free meals to people in need and have diversified to provide a range of community services such as cafes, post offices and hosting village defibrillators.

The wider plight of hospitality businesses, and business rates relief for pubs

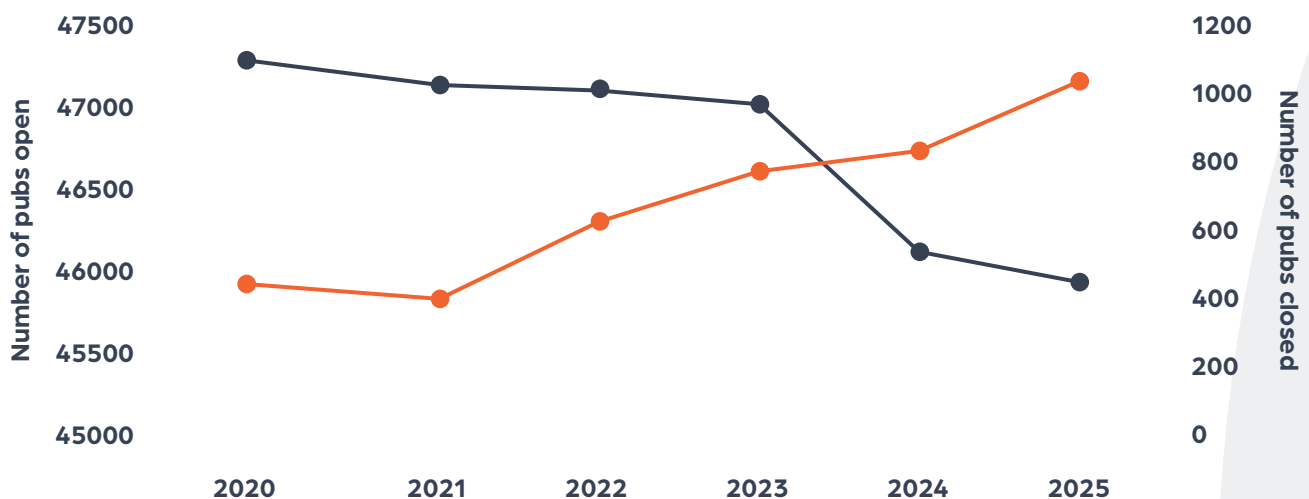
Since the early 2020s, with the COVID pandemic, cost-of-living crisis and cost-of-doing-business crisis, pubs, brewers and the wider hospitality sector have faced significant challenges and tough trading conditions.

Energy costs have become increasingly unstable, further exacerbated by the ongoing war in Iran, and the end of various business rates relief schemes across the UK. The disastrous business rates revaluation in England have made planning for the future almost impossible for licensees. The emergency business rates relief package for pubs will help avert disaster, but sustainable, holistic and longer-term changes are needed to provide the conditions for pubs and independent brewers to thrive.

While the number of buildings in use as pubs remains stable, pub business failures remain incredibly high. Data from CAMRA's pub database shows the following:

Pubs open vs pub closure

● Number of pubs open ● Number of pubs closures



Pubs Codes in England, Wales and Scotland and the Access to Market Review

Over the last decade, there have been some regulatory changes to manage the relationship between pub companies and their tenants, but with varying and limited impacts on how small brewers can realistically sell their beers into tied estates. These reforms have also had no impact on the complex agreements at play in the so called 'free' trade, as outlined above.

Since 2017, a Pubs Code and Adjudicator has been in force in England and Wales, joined by a Pubs Code in Scotland in 2025. The Code in Scotland contains a 'guest beer right' provision, limited to beers from brewers who have an annual production of under 5,000HL.⁽²⁴⁾

CAMRA has been lobbying for the latest review of the Code in England and Wales to introduce an equivalent guest beer right, and to expand some Code provisions to apply to all tied tenants, rather than just those tied to the largest pub companies.

Guest beer rights, enshrined in law, are a welcome route to increased consumer choice and provide a small route to market for qualifying brewers. However, these agreements do not capture all independent brewers that suffer from market access barriers, nor do they cover pubs that operate outside of tied estates.

In 2025, the Department for Business and Trade carried out the initial stage of an Access to Market Review, announced as part of the 2024 Autumn Budget, looking specifically at challenges faced by independent brewers. CAMRA remains a key stakeholder in the process, providing the pivotal consumer perspective on the current status quo (which is causing detriment and restricted choice for ordinary beer drinkers).

We understand that the initial stage of the review is complete, which creates the opportunity for further stages of investigation. A steer from the Government on more fundamental, structural changes to fix how the beer market works for consumers and independent brewers, would be welcome as a part of that.



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Review of CMA vertical merger decisions, and upcoming review of the Vertical Agreements Block Exemption Order (VABEO)

In 2021, the CMA commissioned E.CA Economics to conduct a review of their handling of vertical merger decisions.

With specific reference to their findings on the CMA's handling of the Punch/Heineken case of 2017, E.CA found that the CMA should have investigated the vertical as well as the horizontal effects in competition analysis to fully understand the competition effects of mergers within the UK beer sector.⁽²⁵⁾

We believe that vertical agreements within the on-trade market require much closer investigation, which is timely, considering that the order that permits them below a certain threshold of concentration, the VABEO,⁽²⁶⁾ will cause to have effect in 2028 and therefore the CMA will need to initiate a review process soon.

The UK Government's Strategic Steer to the CMA

For many of the reasons above, we believe that market investigation into the on-trade beer market fits within the current Strategic Steer that the UK Government has provided to the CMA.⁽²⁷⁾

This is based on:

- Stimulating economic growth through greater competition within the beer sector.
- Focussing on areas of the market where there is harm to UK based consumers and businesses.
- Focussing on anti-competitive conduct that harms consumers and businesses.

A clear direction from Ministers that the UK on-trade beer market is a relevant and pressing urgency within the existing Strategic Steer would be a greatly beneficial action, which could form part of the next steps of the Access to Market Review.

There is now a strong case for fundamental action to unlock greater competition and stimulate growth, to the benefit of independent brewers and ultimately ordinary consumers who enjoy beer and value the social and cultural contribution of pubs to UK society.

CAMRA asks Government to:

1. Request that the Competition and Markets Authority (CMA) investigate and rectify any distortions within the UK beer market, to include but not be limited to the various practices that limit access to market for independent, small and medium-sized brewers. In the absence of willingness by the industry to change its ways, we believe that a **CMA-led market investigation** is the only way to address the issues we have raised.
2. **Investigate the legality and legitimate scope of line maintenance contracts** that oblige supposedly independent pubs and other premises to sell a limited range of specified beers or force them to pay significant additional fees to stock those from smaller, local and independent breweries.
3. Support growth in the beer sector by **encouraging the efforts of UK-based independent breweries in both the domestic and export beer markets.**
4. Introduce **labelling that compels brewers to set out clearly which brewery brewed the beer** and which company owns the brand.
5. Use the upcoming review of the new alcohol duty system to **examine the principles that underlie the UK's counterproductive level of taxation on beer.**





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Unlike some
of the beers you'll
find on supermarket
shelves, this report
was made by real
beer enthusiasts...



About the editor

Tim Webb is a UK beer writer and brewery industry commentator, best known for co-authoring *The World Atlas of Beer*. He chairs CAMRA's Beer and Cider Campaigns Committee and teaches about European beer styles, the global craft beer revolution, and the challenges climate change poses to brewers.



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