

Fifty years on: Hall & Woodhouse Ltd, 1945 - 1995. Part II

Frank Pike

1988 started with an emphasis on the need for a period of consolidation. The group had grown rapidly over the past five years and was now experiencing greater problems with pricing and margins, particularly in the take-home trade. Concern was expressed over low profit margins on canned beers, many supermarkets preferring to sell their own label goods that were supplied largely by national brewers.

With the need to contain the group's borrowings it was agreed to be advisable to restrict capital expenditure to essential projects, including property purchases and loans to free trade customers.

A change in the law permitted pubs to trade all day during the week and an appraisal in the managed houses that had started to operate on a flexihour basis had shown that those catering for tourists and those with a public bar image had traded well, although sales in the afternoons were almost non-existent. The additional hour permitted on Sundays had been an unqualified success.

Mr JGG Williams, a senior partner of the Company's London solicitors, Turner Kenneth Brown who had dealt both with company and family business for many years was elected a non-executive director on 28 November, 1988.

Since 1974 there had been an association with Michael Ruthven who was a director and major shareholder in two public house management companies, Buccaneer Inns Ltd and Buccaneer Taverns Ltd. He was also involved in an unsuccessful foray in the early 1980s by another company, Inns of England Limited, to Houston, Texas. The Company now agreed to purchase the remaining shares in Buccaneer Taverns and to take back under direct management four public houses that Taverns had been running for several years. At the same time the Company agreed to sell its interest in Buccaneer Inns.

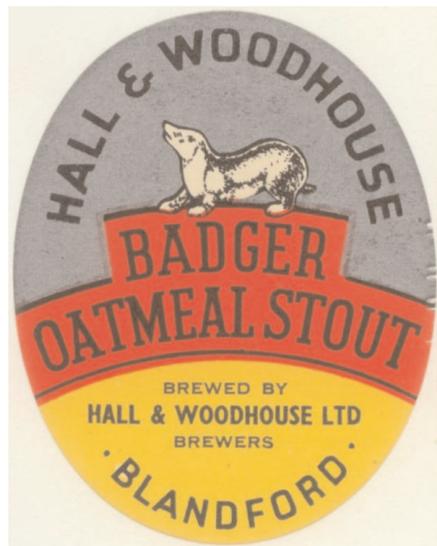
By the middle of 1989 it had become apparent that there was a need for larger and better accommodation for Badger Inns and it was agreed to create a new suite of offices for this purpose on the

second floor of the old maltings, above the wines and spirits warehouse. Consequent on this decision cellar services department moved next to the vending/dispense service area at the Panda building. The estates department moved into a cottage previously occupied by Badger Inns and the wines & spirits department offices took their place above the computer department. At the same time it was agreed to enlarge and improve the wine shop and to accommodate the tied trade personnel above, as one unit. Also, to move the brewery free trade and tele-sales operation to the Panda building so that the brewery main office block would be occupied by the accounts, purchasing and payroll departments on a group basis, and some directors' offices, together with the secretarial and administrative staff.

With the benefit of hindsight it can now be appreciated that 1983/84 was a watershed in the take-home trade operation that was then and until 1992 the responsibility of Panda Drinks. In the following year Gateway came 'on stream' for Skona Lager and the Company effectively became a private label producer with almost 80% of sales going to them. Thereafter with poor summers and increased price competition, results fluctuated until 1990 when Gateway because of financial difficulties, sold its biggest stores and changed owners, thus ending the special relationship. During these years the sale of Panda products produced low levels of profit until 1988/89 when trade pricing was allowed by the

competition to improve. However, profits from canned beer sales which had been take-home's major source of profits ran into severe price competition at the same time. With contract canning production never producing much profit other than in 1987/88 with an exceptional one off contact from Pepsi Cola the take-home division's profits at the end of the decade were little better than they were at the start.

The fortunes of Panda Pops, which had almost disappeared in 1989 when the use of glass bottles had to be discontinued because of unreliable availability and high costs, were restored in the following year when a suitably priced PET bottle could be sourced, with Pops regaining a market share of the kids' small bottle



drinks market that was in excess of 25%. Two years earlier in 1988 a soft drink containing 10% juice cocktail with mineral water was conceived, the idea being to move into a perceptibly opening opportunity with the cola-lemonade-orange dominated segments. After a dangerous birth, when called ARRIBA, it became the subject of a court action by Cadbury-Schweppes. It was to grow without media support under the new name RIO consistently over the next five years.

The Mergers & Monopolies Commission report into the brewing industry presented its findings in March 1989 which caused the chairman in his annual statement to shareholders to remark

uncertainty continues to hang over the brewing industry following the report of the Monopolies & Mergers Commission. We are confident that we can continue to run a successful business though new problems and difficulties will face us. Nationally, major changes - including possibly the loss of many thousands of tenancies - would result. It seems most unlikely that costs and prices would fall, and we question whether the Government would be wise to upset the existing system which has been steadily adapting itself to change. The full consequences are unforeseeable and potentially disastrous for the future of the British pub particularly in rural areas.

At a directors' meeting on 5 December, 1989 David Hart amplified to his colleagues a report he had written which recommended that the position of Panda

Drinks as an autonomous soft drinks business within the group with an agency for canned beers should end, and that Colin Plain should specialise more on the increasingly strategic requirements of brand success in the take-home trade. Particularly, he saw the need for canned beer production and sales to be recognised as a more central core activity of the group and that the whole take-home trade warranted focus at a very senior management level.

He believed it necessary also to bring all the group's small packaging plants within a single flexible production strategy, to escape from image problems that Panda Drinks had sustained from its over exposure to Gateway and to correct internal divisions that had occurred because different directors were managing separately three parts of the business. His recommendations were accepted and it was agreed that all the wholesale trade sales operations should be under the Hall & Woodhouse name. It was to be the responsibility of Colin Plain from September, 1990 when the free trade sales director John Stringer was due to retire.

In 1989 the first licensees and managers golf day was held at Broadstone Golf Club. Amongst the prizewinners was Mark Woodhouse - for the greatest number of lost balls. It was a highly successful meeting that has now become a permanent fixture in the calendar, the guests being invited to play at different clubs in the area.

1989/90 Tied trade

	Bris Draught	Bris Bottled	Total	Gals W/S	£ Purchases
Lord Nelson, Poole	1163	135	1298	1179	289,094
Artful Dodger, B'mouth	711	100	811	1164	214,292
Eel Pie, Twickenham	612	36	648	480	129,660
Victory, Southampton	574	50	624	441	149,689
Woodman, Battersea	572	30	602	592	127,145

Directors JM Woodhouse (Chairman), TDM Hart (Managing), ARJefferies, RS Mackenzie, FG Matthews, FC Plain, JL Stringer, JGG Williams, Secretary AR Jefferies

Net Profit after tax - £3,214,024.

In the four decades since World War II that have been covered by this story so far, each has witnessed key events that have changed significantly the nature of the brewing industry, and the retail licensed trade.

Then, some 400 brewery companies with 800 breweries resumed, gradually, normal working. Annual beer consumption was about 32m barrels p.a. and was, predominantly of cask-conditioned ale and bottled ale, but bottled beers predominated as a guarantee of assured quality.

In the 1960s a wave of mergers and take-overs occurred, accelerating the rate of 'exit' of the smallest companies from the market. In 1960 there were 247 companies using 358 breweries. A major feature of the 1960s was the introduction of keg ale by the new pan-regional or national brewers with the twin objectives of (a) improving beer quality for the consumer

(publicans were not very good at looking after their cask-conditioned beers) and (b) introducing products which could be nationally advertised. CAMRA emerged in protest! An era of national ales and corporate images was to last for ten years. Substantial numbers of tenancies were switched to management. During this time many local brewers were able to survive on their cask-conditioned ale business rather than incur the cost of expensive equipment required for conditioning, filtration and keg filling.

The 1970s saw the introduction of keg lager and a marked decline in the rate of take-overs and brewery closures. Within the national brewers' strategy on keg lager lay three objectives; to meet an emerging demand for a continental style beer at a good profit margin, to substitute a new style beer for the declining keg ale volumes and to further marginalise the small brewer in both production and retail

terms. With the beer market now 'ex growth', market share increasingly had to be won at consumer level. Further houses were switched from tenancy to management. The decade saw also the emergence of the Take-home trade for canned products.

The 1980s saw continuing decline in beer consumption but a continuing substantial growth in lager consumption particularly in a take-home market growing at the expense of the on trade pub market. But the 1980s also saw a resurgence of interest in local brews of cask-conditioned ale and with this emerged a new era of 'micro brewer.'

The 1980s also saw a determined assault by the Office of Fair Trading (OFT) and Monopolies & Mergers Commission (MMC) on the system of vertical integration between breweries and pubs, focussing on the national brewers. For some years the OFT had expressed concern at the diverging rate of brewers' price increases between the pub trade and the take-home beer trade. The 1986/89 MMC Enquiry resulted in the Beer Orders 1989 from the Department of Trade and Industry (DTI). One of these Orders obliged the national brewers to 'untie' the beer supply to a large number of their pubs. Some 11,000 pubs in all were 'untied.' This resulted in their disposal to a new breed of Pub Companies (whose managements promptly 're-tied' their newly acquired pubs back to the disposing brewer in return for substantial trade discounts!).

The fifth and present decade

The Company was incorporated in 1898 during what became to be known as the 'naughty nineties.' A century later history may judge this to have been the 'nervous nineties' for the boom of the late 1980s came to an end quite suddenly and was followed by recession with all its adverse consequences on the licensed trade set in. National consumption of beer that stood at 6.32m litres in 1989 fell to 5.64m litres in 1993.

Within this four year decline several facts are worth noting:

- a) The take-home market for beer increased from 19% to 23% of the market. (12%)
- b) Lager drinking moved up from being 50% to 52% of consumption. (31%)
- c) The number of breweries fell from 105 to 93 (142) whilst those actually brewing increased from 64 to 65. (81)
- d) The number of pubs owned by brewers fell from 44,000 to 30,600, (49,000) and the local and regional brewers share of the market fell from 14% to 9%.
- e) The average price of a pint of draught bitter increased from 96p to 137p (41p) and for lager from 108p to 154p (47p).
- f) The excise duty per pint rose from 17.8p to 23.8p (8.6p) and VAT on a pint of bitter from 12.5p to 20.4p (5.3p).

The figures shown in brackets are those for 1980.

In February, 1990, less than two years after its purchase, Colin Plain reported that the production unit at OG Naris, West Molesley had closed down and would be sold. His recommendation that the warehouse facility should be retained as a base for a wholesaling operation for a trial period of a year was accepted. It closed early in 1994.

It was at a directors' meeting held on 4 September, 1990 that the head brewer, Patrick Heron, together with David and Mark Woodhouse were elected to the board. At the same meeting a comment was made that oil prices were likely to rise significantly as a result of the conflict in the Gulf between Iraq and Kuwait.

In September also the directors met to discuss strategic issues and agreed that future trading was likely to be tougher although it was thought that the place of family owned breweries would become increasingly important. Some brewers had stopped brewing to become retailers only and Mr Hart forecast that by the year 2000 there might be three national brewers only with a few regional companies and possibly twenty independents.

It was announced that the Company would sponsor at an initial cost of £225,000 one of ten yachts that were to compete in the British Steel Challenge round the world race in 1992.

The managed house estate had grown from 20 to 70 units in five years. It was agreed that this was a rate Badger Inns

could sustain but the problem was to find suitable houses. Nevertheless 21 properties, either for lease or freehold purchase were to be acquired during the next five years, during which time only two houses were sold.

Colin Plain took early retirement and left the company on 25 November, 1990. His decision was a presage of a break-up of the Panda sales team.

At the December 1990 board meeting the chairman said an opportunity had thus been created to re-address the future direction of sales and marketing of the take-home trade division and Peter Greensmith was recruited on 25 March, 1991 to head up this operation, with membership of the main board. Before joining the group, Peter had a number of marketing and sales directorships including Food Brokers and Ushers Brewery.

The fundamental changes that had been discussed first in 1989 were therefore now in place. So, this would seem to be a good time to record some of the other activities that had been happening within the group.

Wines and spirits

The modern Company concept was established by Mark Brandon in the early 1980s which decade saw a dramatic change in the number of countries from which wine was imported. Australia, Bulgaria, Chile, Hungary, New Zealand

and South Africa were examples where a loyal following had been created by increasingly discerning customers. In 1991 the Company acquired Hicks & Don Limited, a wine merchant with a mail order, and up-market trade business based primarily in the London area and in the following year the Company wine business became focused towards four areas.

Firstly, Hicks & Don mail order. A list of about 5,000 customers were being mailed to six or seven times a year. Some of the wine sold was ex cellar so it was sold in cask in France and shipped to the customer at a later date when ready for casking.

Secondly, Hicks & Don wholesale and retail trade. This was to hotels, restaurants, service messes and a wide variety of clubs.

Thirdly, the off licence shops most of which had been managed by Chandler Wine until it became Badger Inns in 1973 when they were gradually transferred to tenancies reverted to management again and branded, or earmarked for disposal. By 1995 there were ten shops under management located in North Dorset, Poole, Bournemouth and Southampton. These trade under the name of Woodhouse Wines.

Fourthly, the Company's tied and free on trade customers who were given a larger and more interesting selection of wines from which to choose. The department

prided itself on its sourcing and selection of wines, and was committed to continue to offer an ever improving service to customers.

An experiment that did not succeed was the establishment of a wine warehouse at Shirley, Southampton. A suitable property was leased in 1989, but business did not come up to expectations and it closed in July 1991.

The local community

Members of the Woodhouse family, other directors and senior staff have always recognised that living and working in a small town environment carried with it some responsibility for playing an active role in the affairs of the local community. For example, between the wars Harold Woodhouse was for many years a County Councillor and Mayor of Blandford in the years 1926 and 1927.

A notice of the annual general meeting of the subscribers and friends of Blandford Cottage Hospital in 1938 revealed the fact that 'Colonel HS Woodhouse, TD will preside', that Mr FD Woodhouse was chairman of the committee and Miss Rita Woodhouse was named amongst the lady visitors. Following the establishment of the NHS in 1948 the present Friends of Blandford Community Hospital was founded and in response to an appeal in 1958 the Company made a donation of 125. It has continued to subscribe ever since and to give valuable support to the

hospital in other practical ways. John was chairman of the committee when he died in 1986 and was succeeded by Frank Pike who now has David Woodhouse as a member of the Friends' council.

Over the years too, others have been officers of many local organisations such as cricket and swimming clubs, operatic and dramatic societies, Parish Councillors, Justices of the Peace, Blandford Rotarians, School Governors and members of the Territorial Army and Army Cadet Forces; the latter being recognised in 1989 by the award of a national certificate and plaque to the Company for its declared support and encouragement of the reserve forces.

The directors have always been sympathetic in pledging the company's support to charities, mainly local, and in the last decade or so these have included: Army Benevolent Fund (Dorset), British Airways Dream Flights, Blandford Church Restoration Fund, Blandford Music Week, Blue Peter Appeals, Joseph Weld House Hospice and Respite Centre, London Zoo (Giant Panda Breeding Programme), Riding for the Disabled, Royal Corps of Signals Museum at Blandford Camp, Salisbury Cathedral Spire Appeal, Shillingstone to Blandford Raft Race.

Individual tenants and managers have supported also innumerable good causes, including Independent Television's Telethon over the weekend 27/28 May, 1990. This was a major sponsorship

organised successfully by Brian Miller and Peter Ellis for which the Company pledged a minimum of £50,000. This sum was exceeded comfortably to the benefit of several local and national charities.

Early in 1991 the directors reviewed the house acquisition policy that had started in earnest in 1984, and Robert Mackenzie pointed out the success of the four houses in south west London where the proportion of 'drinking' as opposed to 'eating' customers was higher than elsewhere. It was agreed that the search for suitable houses should be concentrated on areas where the Company was already trading well, and this meant turning to the east, rather than to the west of Blandford as well as within a 25 mile radius from the brewery. It was appreciated that the alteration and improvement of pubs already owned could also be successful.

At the same time, it was re-affirmed that the Company's aim should be to increase the public's awareness of its own brands, although the stocking of proprietary guest beers had proved popular and should be reviewed regularly.

Foremost in the directors thinking was the need to brew a credible brand of lager for the on-trade and it was recognised that this should be Hofbrau which merited concerted support on a long term basis.

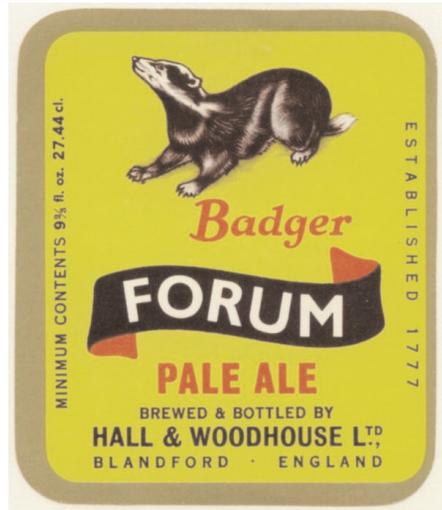
Even at that time David Hart expressed his concern at the likely move by the European Union in 1997 to restrict tied

trade tenancies. He warned that a team effort over the next five years would be required to avoid the consequences of these moves.

On 9 February, 1991 one of Dorset's oldest and most attractive inns the World's End, Almer on the busy A31 west of Wimborne was destroyed by fire. Owned by the Drax Estate the pub had been supplied with Badger beers for many years. Originally a free house known by the sign of the Red Lion it had been leased by the Company since 1953. The house was skilfully rebuilt to a very high specification under the supervision of the group's estates manager Graham Walters, in the image of the original building and re-opened in time for the spring bank holiday weekend the following year.

As the effects of the recession continued to bite the management sought continuously to find means of achieving greater efficiency in the group's operations, and also explored aggressively the marketing potential of existing and new brands of beers and soft drinks, and outlets in which they could be sold profitably. Also, the winning of contract canning business was always in the forefront of the minds of the sales and marketing executives. Management was not above self-analysis and agreed that the group strategy might be better defined, explained and communicated.

Franey Matthews retired on 30 August, 1991 after a total of 42 years working in the brewing industry, 28 of which were



spent with the Company following its purchase of his family's business Matthews & Co of Gillingham in 1963. He had always been involved with tied trade matters including the selection of licensees and overall responsibility for the upkeep and management of the estate. In the last ten years he took charge of the wines and spirits department and for some time during the early 1980s of the whole of the brewery trade. His retirement was marked by two happy social evenings at the brewery attended by 800 licensees and staff.

Following completion of the management changes affecting mainly the take-home trade in 1991 and with the spread of new beer and soft drink brands it was considered that a new name which shared a

closer identity with the brewery and retailing parts of the group would be appropriate so in February, 1992 Panda Drinks changed its name to Hall & Woodhouse Take-Home.

Despite the optimistic forecast of prophets and politicians everyone knew that 1992 was going to be another tough trading year and that the green shoots of recovery were yet to show signs of strong growth.

Prominent amongst the new soft drink brands was Rio Riva, first introduced in 1988 of which by now there were four varieties available, and Peter Greensmith chief executive take-home commented

Rio is performing exceptionally well where stocked and is now out-selling the major brands on many fixtures. Our task now is to improve distribution and to constantly support this new brand.

During the late 1980s the glass bottle came under threat from the PET (Polyethylene Terephthalate) bottle that was safer to use, lighter in weight and more convenient to drink from straight. The quality of glass bottles fell until a point was reached when the Company's production unit no longer had any confidence in their use so it was at a board meeting on 8 September, 1992 a discussion took place on a proposal to install a replacement PET line and bottle blowing plant.

The decision was made to go for a total package on-site bottle manufacturing and

storage linked to a high speed filling and packing line. It was a bold venture, the first in the UK that put the Company at the forefront of high speed PET production. The bottle blowing plant was a combination of British, Italian and German equipment and had a capacity of 70,000,000 bottles a year; the filling and packaging line used German and Italian equipment and was capable of dealing with 48,000 bottles every hour. The project, which started late in 1992, came into production in December, 1993 and was handed over by the main contractors, Kronos, in the spring of 1994. The whole project cost around £6,000,000.

The Spring and Summer of 1992 saw the hectic and exciting run-up to the start of the unique British Steel Challenge round the world yacht race created by Chay Blythe to commemorate the 21st anniversary of his own record-breaking solo circumnavigation covering 28,000 miles, starting from the Solent on 26 September and finishing sometime in May, 1993. As had been announced two years earlier the Company was to sponsor one of the boats which with the exception of the skipper Pete Goss, was to be crewed entirely by amateur sailors who paid up to £14,850 each for the privilege. On 4 May at a ceremony off the Jolly Sailor on the Hamble River she was christened Hofbrau Lager by General Sir Peter de la Billiere KCB., KBO., DSO., MC., The day coincided with the annual outing for the Company staff who witnessed the event from a cruise ship moored alongside. Said David Hart

this is an excellent opportunity to become involved in a major, high profiled event that is centred around facing new and very real challenges. The sponsorship will re-enforce Hofbrau Lager's position as a world class lager with appeal for people who know their own mind, enjoy a choice and are stimulated by challenge. Through the British Steel Challenge Hofbrau Lager is challenging the thinking drinker to choose a lager that has real heritage and is more complex than standard lagers.

As part of the crew's training the yacht took part in the challenge fleet Fastnet Race, visited Cowes Week and Poole and entertained many guests on board for short lighthearted races around the Solent. On 11 September Hofbrdu Lager led the parade of sail of the challenge fleet into St. Catherine's Dock, London - the last big public event before the start of the first leg of the race to Rio de Janeiro. The official charity for the race was Save the Children Fund whose patron, the Princess Royal and all the crews raised considerable sums of money even before the race began in order to prove their commitment. The Princess Royal was also patron of the challenge and started the race off Gilleker Point.

From Rio de Janeiro the route would include stops at Hobart and Cape Town before the last race home to the Solent. The official results for Hofbrau Lager were:

Leg 1. Southampton to Rio de Janeiro
5th position

Leg 2. Rio de Janeiro to Hobart
3rd position

Leg 3. Hobart to Cape Town
2nd position

Leg 4. Cape Town to Southampton
7th position (crossing the finishing line at 22.17.08 hrs on 23 May).

Hofbrau Lager finished 3rd overall, the winner was Nuclear Electric and Group 4 was placed 2nd.

In April 1993 the Chairman announced the setting up of the 'Woodhouse Brewery Trust'. He said

A family business meant more than a business owned by a family. It should be a community in which all the shareholders and employees share an interest and an identity.

The capital had been provided by certain shareholders, the income from which was to provide small scale financial assistance to employees and ex employees of the Company who through no fault of their own had suffered exceptional hardship.

It was in March 1993 that Pat Heron expressed the wish to retire early from his appointment as brewing director. Pat joined the Company in 1971 as assistant brewer to John Woodhouse with whom he struck up a lasting friendship and for whom he had a great respect. Following John's death in 1986 he was promoted to head brewer and as such joined the board of directors in September, 1990.

Subsequently, Alastair MacLeay joined the Company with the appointment of production director. He had worked previously for Brewing Research International where he was head of brewing and members' projects. Also he had spent 25 years with the Watney Group, Grand Metropolitan Brewing and Ushers at Trowbridge.

On 1 June, 1993 the time honoured system by which the government of the day levied duty on beers brewed in the United Kingdom altered for the first time since its inception.

On that date collection changed to fall into line with one of two methods accepted by the EU when all member countries that were not operating an end production duty system, that is, collection at the brewery gate moved to this instead of duty being assessed at the fermentation stage of production.

The very welcome 6% allowance for wastage disappeared since it was no longer relevant. It was replaced eventually by an allowance on cask beers in respect of undrinkable sediments, which was to be agreed locally by individual brewers with Customs & Excise.

The Company was among 36 founder members of a newly formed national trade association known as 'independent family brewers of Britain', the aim of which was to complement that of the industry's umbrella body, The Brewers' Society (now the Brewers & Licensed

Retailers Association) to which members of the new organisation would still belong. David Hart commented

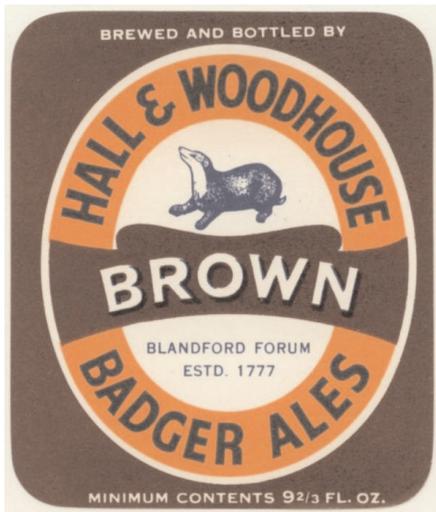
people who care about the choice of ales and pubs in this country know that, elsewhere in Europe, choice is massively restricted when two or three breweries are dominant. I hope this new group will help maintain consumer choice in the face of a massive burden of planned legislation.

and in his report to shareholders the chairman wrote about the new organisation

we maintain close local association between employers and their employees, which is absent from the nationals and the new pub retail chains. The threat to the tie in 1997 is a real one and survival in our present form depends on maintaining it.

The group had certainly not been isolated from the change in national career patterns that had been growing more evident over many years, the tradition that staff stayed for the whole of their working life with the same company reaching a promotional peak, say, ten years before retirement was now the exception rather than the rule. Nevertheless, several employees every year continued to clock up 25 or more rarely, 40 years service.

Inevitably, such long service brought retirements and amongst those who left around this time were Dave Aitken who joined the company in 1951 to serve 40 years in the engineers department,



Ronald Ingram who joined as a 14 year old in 1945. He worked as a maltster in the transport, bottling and beer racking departments. Ronald Pike who joined in 1953 and worked originally in the bottled beer and transport departments before moving in 1957 to Chamen & Richards, then the Company's town retail wine and spirit branch in The Plocks, Blandford. When this closed in 1980 Ronald joined the wines and spirits administrative staff at the brewery. John Starks who served 32 years with the group originally with Sunparlor but nearly all his time in the draught beer racking cellar. John White who in 1955 became manager of a Chandler Wine off licence at Verwood where he combined that with being a free trade salesman covering Salisbury, Lymington and Blandford Camp. After ten years at Highcliffe Wines John returned

to the brewery in 1971 to manage the order and accounts office that included monitoring the cash sales accounts for the depots at Melksham, Southampton and Taunton, and subsequently managed the off licensed estate. Others who retired included Harry Dean who joined Matthews & Co in 1946; Norman Cox with 40 years' service to November, 1993, and Gordon White who had clocked up 33 years with the Company.

Over thirty years after the activities of the Badger Export Company were stopped it was agreed in February, 1994 to try again to develop international business for the group's range of beers and soft drinks and a small department under the control of Andrew Fraser was established. The main markets developed included Spain, Sweden, the former Soviet Union, Brazil and the United States and it was hoped that the trend to reductions in trade and tariff barriers would permit additional and significant opportunities to be exploited in Africa and the Far East.

One of the effects of a developing single market within the EU was the incentive, because of lower excise duties on the mainland, for the British to cross the channel to France to buy cheap beer. It was estimated that in 1993 alone this amounted to about 350,000,000 pints. Members of the independent family brewers of Britain took direct action in 1994 and protested by parading a number of vehicles at Dover port and by writing to the Chancellor of the Exchequer to complain about the level of duty that they

said should be harmonised with those levied by other members' states. This applied to wines also, where the difference in duty levels had resulted in large volumes being imported allegedly for personal consumption but the view was expressed that the government's policy was a direct encouragement to smuggling and organised criminal activity. The position has not changed.

In June 1994 the Company launched a D Day ale to commemorate a great victory in the Second World War, the allied landings in Normandy on 6 June, 1944. The Chairman expressed the view, shared by all of his generation that

we think it important to remind all the many people not old enough to remember the events of fifty years ago, that we only live in freedom today by the great sacrifice of so many lives two generations ago.

It was at a board meeting on 6 September, 1994 that the directors spent time again considering the strategic policies that would benefit the future of the business. The policy of acquisition of suitable outlets for both management and tenancy was re-affirmed, and it was agreed that up to ten additional houses a year could be taken and absorbed within existing financial and human resources. The Take-Home trade needed to be broadened with a concept of sales being national, and with profits coming from a variety of both beer and soft drinks with Tanglefoot, Hofbräu, Rio Riva and Panda Pops leading the way.

In the traditional free trade there was likely to be a continuing shift from direct trade to wholesale merchandise. Contract packaging should be sought for and was likely to continue to make a good contribution to group profits. How did the seeds planted at that meeting germinate and grow?

The acquisition policy target was met for during 1995 ten more houses were added to the portfolio of secured trade outlets. These were:

The Botany Bay, Winterborne Zelston (previously owned by the company until 1987 and known as the General Allenby)
The Grouse & Claret, Westminster
The Hankridge Arms, Taunton. The first new build by the Company since 1986.

The Lion, Pagham
The Monkey Puzzle, Westminster
The Pembroke Arms, Wilton
The Royal Oak, Knowl
The White Hart, Sherborne
The Worlds End, Chelsea

They followed on the previous year's purchases of:

The Black Horse, Hookwood
The Blenheim, Kensington
The Pall Tavern, Yeovil
The Plough, Waltham St. Lawrence
The Stepping Stones, Broadstone

With regard to the take-home trade that was the subject of a first stage evaluation by the department, particularly into the opportunities and difficulties of gaining a significant penetration into the on and off licenced trade. It was agreed this would be slow, and hard to achieve, even if it

was found that the market sector was attractive, due to the dominance of other producers and the relative weakness of the Company's marketing and sales resources that would need to be strengthened. It was believed that soft drink products were likely to meet less objection than the beer range, but the evaluation was still continuing when the 1995 business review took place.

1995 will be remembered as being one of the warmest and driest since records began when with some justification it could be said 'if the brewery can't sell drinks now and make a profit it never will'. History has been defined differently as 'the knowledge of past events' and 'an account of the origins and progress of an institution.' However, there comes a time when a line has got to be drawn, history has to give way and become a current event. It then becomes necessary to move from the past to the present, or even the future tense.

In this narrative 1995 is that time, for it saw the conclusion of commemorations of several historic national events: September, 1990 The Battle of Britain: June, 1994 the allied landings in Normandy: May 1995 Victory in Europe Day: August, 1995 Victory over Japan Day and the end of world war. It was the year when it was understood why and accepted by all, to be a right time to turn one's head and take a long look back, probably for the last time, at those events of fifty years ago. A time of personal remembrance for some but history only for many, just like much of this particular

story that also is coming to its conclusion. So, to take the story full cycle by going back to the beginning: the following is an extract from the Record of the Company's Annual General Meeting held on 8 August, 1945. The attendance was four directors, one shareholder and the secretary. Profit reported for the year ended 31 May, 1945 was £27,171.2s.7d. Total dividend on the ordinary shares - 15%. The Chairman (FD Woodhouse) in his address said

We can all breathe more freely now that the war in Europe has ceased ... properties that were requisitioned are being released ... repair to our properties is more in abeyance than we would like, it is most difficult to get work done, the £10 limit per house is making it worse ... our brewery plant is now finding its age and we have a great deal to renew. Regarding trade, we have more than we can cope with, we are and have been brewing to our full capacity, but never have we enough. Demobilisation is proceeding slowly, we are most in need of office staff but as they were mostly young men, they do not return quickly.

We are fortunate in still having the senior members of the staff with us, they have kept the ball rolling for the whole of the war, we owe them a great debt of gratitude. Regarding a bonus, at a meeting with the men we pointed out the bonus was given as an incentive for co-operation to our mutual benefit.

The meeting agreed that a sum of £900 be approved as additional remuneration to the Directors for services rendered, to

be divided among them as they may decide. It was, indeed, another world!

The present decade has now passed its halfway stage and the countdown to the millennium has begun.

The final major theme of the 20th century may be the review in 1997 of beer tie arrangements throughout the EU. A renewal of the 'beer tie' is vital to the future of small brewers as brewers, and to the consumer if (s)he wishes to continue having a good choice of beers. Even with a renewal many small brewers will find it hard to remain viable as producers such as been the migration of consumers to nationally advertised brands.

As far as the Company is concerned, operating within a world of rapid and often bewildering change, the last five years have been as active and interesting as any that have gone before.

Happily, this is a story without an end in sight but as the group starts on its second 50 years since 1945 it is a time to stop and let the future shape itself.

'Fifty years on' has recorded just part of what is known with certainty of the past

but the temptation to speculate on what the future may bring is too great. Will 1997 see an end of the tied trade system as it has been known and accepted for the past 200 years, or so? Will drinkers soon be paying for a pint with ecus or euros - and if they are, does it matter? Will the country at last have permanent steady economic growth without the curse of inflation? Only time will give the answer to these questions.

What does seem probable is that those in charge of affairs in the future will not be so free to control the destiny of the Company as those that have gone before were. Society and business are still changing at a speed undreamt of only a decade or so ago, but whether this will prove to be for the better or not is a matter for conjecture. It will be up to someone else to record the answer some time in the next century, when asked to do so by another member of the Woodhouse family.

Frank Pike, who died in 2009, wrote this history in the latter 1990s and we thank his family and Hall & Woodhouse Ltd for permission to reproduce it in the journal.