

Pubs and Breweries in Wales

The State of the Nation 2025

Tafarnau a
Bragdyau yng Nghymru
Cyflwr y Genedl 2025

WBPA
LLAIS BRAGWYR A THARFARNDAI



Chairman's Foreword

The Welsh Beer and Pub Association's State of the Nation report is the first time that we have carried out such a thorough survey of Wales' irreplaceable beer and pub sector. As anyone who has sampled our nation's fine beers before a six nations' match in Cardiff, a country pub in the mountains or borders, a lively boozier by the seaside in North Wales, or simply just down their local, you will know that the beer and pub sector in Wales has a distinct history, character and culture which is different to the rest of the UK.

The last decade has seen a blossoming of local breweries across the principality and the last year has seen a slowing down in the number of pub closures. This is great news. The sector is also leading the way in key areas including our environmental and sustainability commitments. But there is no getting away from the fact that margins are slim and being further squeezed, many operators are struggling to manage with the increasing cost-of-doing business and the national economic outlook is challenging.

Wales' brewers and publicans have always been resilient and have adapted and flexed to tough times before and they will do again now. But more than ever, we need policy makers and politicians, be they in Cardiff Bay or Westminster, to take a second look at the policies they are drafting, especially their cumulative impact, and work with sector to put in place the regulatory and economic frameworks which will make sure our breweries and pubs remain the backbone of their local communities and economies. After all, in any bustling town or village in any corner of the country, you can always find a vibrant pub. The report sets out ten policy recommendations that together will help ensure this happens – not just business as usual, but the policies that will spur on innovation and drive investment from companies across our sector - big and small. The WBPA looks forward to working with our politicians to put these in place. To that, I raise a glass of Wales' best and say iechyd da!

Nick Payne

Chair of the Welsh Beer and Pub Association
Managing Director of SA Brains

Contents

1. Executive Summary	4
2. Summary of key recommendations	7
3. Crynodeb Gweithredol	8
4. Argymhellion allweddol	11
5. Introduction	12
Objectives of report	
6. Industry Overview	14
Economic Contribution	
Economic Impact	
Differences between 2019 vs 2022	
7. Policy, Regulation and Challenges	21
Business Rates	
Deposit Return Scheme	
Public Health	
8. Case studies	28
Felinfoel	
SA Brains	
AB InBev	
9. Future Outlook	34
Economic Conditions and Regulatory Environment	
Sustainability and Technological Advancements	
Consumer Preferences	
10. Conclusion	37



The Welsh beer and pub sector has an integral place within the local economy, generating over £1.5 billion in Gross Value Added and hundreds of millions of pounds in tax revenue¹. Yet despite this economic importance, a number of challenges are now placing the viability of the sector at risk. The sector has been badly affected by the COVID-19 pandemic and recent economic pressures to a greater degree in Wales than across the rest of the UK; net closures of pubs have been higher in Wales than the rest of Great Britain, with 6.5% closing between 2018 and 2023 vs 4.6% in England and 3.9% in Scotland².

From grain to glass, the Welsh beer and pub sector supports over 25,000 jobs directly and up to 43,000³ jobs through the entire supply chain. These jobs are in every constituency up and down the country, supporting local economies, and agricultural communities too. Pubs and breweries are cherished in every single community across Wales, acting as an economic anchor on the local high street, attracting additional footfall, and providing that further social and cultural benefit so often overlooked in business and industry. The beer and pub sector in Wales stands at a crossroads due to some critical challenges, juxtaposed by a plethora of opportunities for growth.

Escalating costs have hit the industry hard and have had a detrimental, in many cases existential, impact on pubs throughout Wales. Increased raw material, energy, and labour costs have hit the sector hard. These increased costs have squeezed profit margins with pubs receiving a meagre 12p⁴ on each pint sold after taxes and other expenses.

High rates of taxation have long burdened the industry with sticking plaster policies acting as mitigators for over a decade. UK beer duty outpaces its European neighbours drastically, sitting 12x higher in some cases and 3x higher on average⁵. This stark contrast is a policy decision. In Germany, where a similar proportion of the population's employment depends on the tourism sector, beer duty sits at 4.4p per pint, and in Wales it sits at 54.4p per pint.

Last year's cut in business rates relief in Wales, from 75% to 40%, increased financial pressures on pubs. This meant the average pub in Wales was £6,000 worse off compared to their English counterpart due to lower relief and lack of a small business multiplier⁶.



The Welsh Government in December 2024 maintained business rates relief at 40% for 2025/2026 but the industry continues to call for long-term, permanent business rates reform to level the playing field and provide financial certainty.

Across Wales, there has been persistent licensed premises loss which has damaged local communities and employment prospects. Encouragingly, this trend was bucked in 2024. Figures from the Welsh Beer and Pub Association found closure rates to be lower last year than in previous years. As inflation and supply chain issues have eased, alongside the stabilisation of local economies post-Covid a reduction in closure rates was expected, but this is encouraging nonetheless.

There is cause to remain concerned, however. In April 2025, employment measures announced in the October 2024 budget will come into effect. The increased National Minimum Wage and National Insurance Contributions is expected to cost the UK-wide beer and pub industry more than £500 million⁷.

The high cost-of-doing business, combined with disproportionate taxation continues to place pub culture in Wales at risk. Ongoing new regulations may well impact on the sector's ability to operate. The proposed DRS and EPR recycling costs, which current estimates show will cost 5-7p per glass bottle⁸, are a concern for manufacturers and publicans alike, amplified further due to divergence of DRS schemes across the UK.

Wales is a leader in many areas and devolution provides the opportunity to generate real change and support a sector that is integral to so many communities in Wales.

Sustainability initiatives are often pioneered in Wales, spearheading the green revolution for the rest of the UK. With a greater focus now being directed toward the need to be sustainable within the industry, investing in green technology and sustainable brewing methods will reduce costs and attract more environmentally concerned customers. When policy is designed and implemented alongside businesses, there really is no limit to what this sector can develop.

Innovation is setting the industry alight. Low-alcohol and no-alcohol variations of well-known and much-loved drinks have allowed the industry to meet changing consumer trends and reach a wider market, while supporting public health initiatives to reduce consumption. New power and storage solutions in brewing, referenced in case study iii in this report, pioneered in Wales are world-leading and encapsulate the adaptive nature of the sector.

The visitor economy is a huge part of the Welsh economy, drawing from the rich cultural history of Welsh pubs and breweries, Wales' tourism sector could be unlocked to generate huge income for local authorities while creating and supporting high quality, flexible jobs.

For ten years the introduction of a visitor levy in Wales has been debated. In November 2024, the Visitor Accommodation (Register and Levy) Etc. (Wales) Bill was introduced to the Senedd. While this has been proven to sometimes have a positive overall effect, as researched in depth by the Welsh Government⁹, the consumer spending squeeze has caused concern for the Scottish Tourism Alliance, where a similar levy has been introduced.¹⁰

Addressing the increase in costs, high levels of taxation, and increased regulatory pressures through supportive policies and innovative practices will be essential for future success. Sustainability, tourism, and product innovation will continue to support the prosperity of this industry and contribute to the economy of Wales on a local and national level if policymakers in Cardiff and London take the calls in this report on board.



1. Reduce Beer Duty: Align beer duty with the EU average to lower current rates, which are significantly higher.
2. Reform Business Rates: Adjust business rates to reflect economic realities and balance the disparity between online and brick-and-mortar businesses.
3. Review Budget Announcements: Urgently review the phasing and cumulative impact of Budget announcements, especially regarding National Insurance changes. Including considering a lower VAT rate for food and drink sold in pubs to support growth, boost tourism, and provide parity with supermarkets.
4. Reconsider the introduction of a Visitor Levy: This new tax represents a further cost of business on the hospitality sector in Wales, one that we believe will negatively impact on income for pubs if it reduces the number of tourists. As a minimum, the funds collected through such a levy must be ring-fenced for the specific support of the tourism sector.
5. Employment and Skills Regulation: Ensure regulations support growth and investment in pubs and brewers, maintaining flexibility for seasonal and unpredictable trading patterns.
6. Incentives for Green Investments: Provide tax relief and grants for sustainable practices to help breweries reduce their environmental impact.
7. Fix Non-Domestic Energy Market: Implement Ofgem recommendations and supporting legislation to permanently fix the non-domestic energy market.
8. Fair and Sustainable EPR Fees: Review EPR fees to ensure fairness and sustainability, allowing businesses to adjust operations and plan financially.
9. Interoperable DRS: Ensure DRS across the four nations is interoperable to avoid added complexity and costs.
10. Support for Low and No-Alcohol Products: Encourage the development and marketing of low and no-alcohol beverages, and consider a 'lower strength' descriptor for beers not exceeding 3.5% ABV.



Mae gan sector cwrw a thafarnau Cymru le hanfodol o fewn yr economi leol, gan gynhyrchu dros £1.5 biliwn mewn Gwerth Ychwanegol Gros a channoedd o filiynau o bunnoedd mewn refeniw treth. Serch pwysigrwydd economaidd hwn, mae nifer o heriau yn awr yn rhoi hyfywedd y sector mewn perygl nawr. Mae'r sector wedi cael ei effeithio'n wael gan y pandemig COVID-19 a phwysau economaidd diweddar i raddau mwy yng Nghymru nag ar draws gweddill y DU; mae cau tafarnau net wedi bod yn uwch yng Nghymru nag yng ngweddill Prydain Fawr, gyda 6.5% yn cau rhwng 2018 a 2023 o'i gymharu â 4.6% yn Lloegr a 3.9% yn yr Alban.

O rawn i wydr, mae sector cwrw a thafarnau Cymru yn cefnogi dros 25,000 o swyddi'n uniongyrchol ac hyd at 43,000 o swyddi trwy'r gadwyn gyflenwi gyfan. Mae'r swyddi hyn ym mhob etholaeth i fyny ac i lawr y wlad, yn cefnogi economïau lleol, a chymunedau amaethyddol hefyd. Mae tafarnau a bragdai yn cael eu gwerthfawrogi ym mhob cymuned ar draws Cymru, gan weithredu fel angor economaidd ar y stryd fawr leol, gan ddenu mwy o draffig cerdded, a darparu'r budd cymdeithasol a diwylliannol ychwanegol hwnnw sy'n aml yn cael ei anwybyddu mewn busnes a diwydiant. Mae sector cwrw a thafarnau Cymru ar groesffordd oherwydd rhai heriau critigol, wedi'u gosod ochr yn ochr â lluo o gyfleoedd i dyfu.

Mae costau cynyddol wedi taro'r diwydiant yn galed ac wedi cael effaith niweidiol, mewn llawer o achosion yn bodoli, ar dafarnau ledled Cymru. Mae costau deunydd crai, ynni, a llafur cynyddol wedi taro'r sector yn galed. Mae'r costau cynyddol hyn wedi gwasgu ymylon elw gyda thafarnau yn derbyn dim ond 12c ar bob peint a werthir ar ôl trethi a threuliau eraill.

Mae cyfraddau trethi uchel wedi bod yn faich ar y diwydiant ers amser maith gyda pholisïau plastr gludiog yn gweithredu fel lliniarwyr am dros ddegawd. Mae dyletswydd cwrw y DU yn rhagori ar ei chymdogion Ewropeaidd yn ddramatig, gan eistedd 12x yn uwch mewn rhai achosion a 3x yn uwch ar gyfartaledd. Mae'r cyferbyniad llwm hwn yn benderfyniad polisi. Yn yr Almaen, lle mae cyfran debyg o'r boblogaeth yn dibynnu ar y sector twristiaeth am gyflogaeth, mae dyletswydd cwrw yn eistedd ar 4.4c y peint, ac yng Nghymru mae'n eistedd ar 54.4c y peint.



Y llynedd, cwtogwyd rhyddhad ardrethi busnes yng Nghymru, o 75% i 40%, gan gynyddu pwysau ariannol ar dafarnau. Roedd hyn yn golygu bod y dafarn gyfartalog yng Nghymru yn £6,000 yn waeth ei byd o'i gymharu â'u cymar yn Lloegr oherwydd rhyddhad is a diffyg lluosydd busnes bach.

Ym mis Rhagfyr 2024, cadwodd Llywodraeth Cymru ryddhad ardrethi busnes ar 40% ar gyfer 2025/2026 ond mae'r diwydiant yn parhau i alw am ddiwygio ardrethi busnes hirdymor, parhaol i lefelu'r cae chwarae a darparu sicrwydd ariannol.

Ar draws Cymru, bu colled barhaus o safleoedd trwyddedig sydd wedi niweidio cymunedau lleol a rhagolygon cyflogaeth. Yn galonogol, cafodd y duedd hon ei gwrthdroi yn 2024. Canfuwyd gan Ffederasiwn Cwrw a Thafarndai Cymru fod cyfraddau cau yn is y llynedd nag mewn blynyddoedd blaenorol. Wrth i chwyddiant a phroblemau cadwyn gyflenwi leihau, ochr yn ochr â sefydlogi economïau lleol ar ôl Covid, roedd disgwyl gostyngiad mewn cyfraddau cau, ond mae hyn yn galonogol serch hynny.

Fodd bynnag, mae rheswm i barhau i fod yn bryderus. Ym mis Ebrill 2025, bydd mesurau cyflogaeth a gyhoeddwyd yn gyllideb Hydref 2024 yn dod i rym. Disgwylir i'r cynnydd yn yr Isafswm Cyflog Cenedlaethol a Chyfraniadau Yswiriant Gwladol gostio mwy na £500 miliwn i ddiwydiant cwrw a thafarndai'r DU.

Mae'r costau uchel o wneud busnes, ynghyd â threthiant anghymesur, yn parhau i roi diwylliant tafarndai yng Nghymru mewn perygl. Gall rheoliadau newydd parhaus effeithio ar allu'r sector i weithredu. Mae'r costau ailgylchu DRS ac EPR arfaethedig, y mae amcangyfrifon cyfredol yn dangos y byddant yn costio 5-7c y botel wydr, yn bryder i weithgynhyrchwyr a thafarnwyr fel ei gilydd, wedi'i chwyddo ymhellach oherwydd amrywiant cynlluniau DRS ar draws y DU.

Mae Cymru yn arweinydd mewn sawl maes ac mae datganoli yn darparu'r cyfle i gynhyrchu newid gwirioneddol a chefnogi sector sy'n hanfodol i gynifer o gymunedau yng Nghymru.

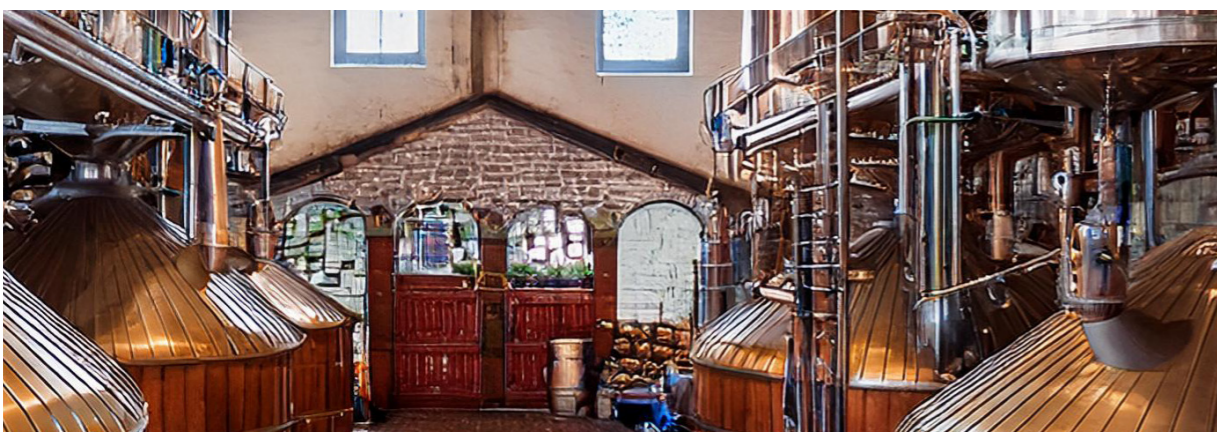
Mae mentrau cynaliadwyedd yn aml yn cael eu harloesi yng Nghymru, gan arwain y chwyldro gwyrdd ar gyfer gweddill y DU. Gyda mwy o ffocws bellach yn cael ei gyfeirio tuag at yr angen i fod yn gynaliadwy o fewn y diwydiant, bydd buddsoddi mewn technoleg werdd a dulliau bragu cynaliadwy yn lleihau costau ac yn denu mwy o gwsmeriaid sy'n poeni am yr amgylchedd. Pan fydd polisi'n cael ei ddylunio a'i weithredu ochr yn ochr â busnesau, nid oes gwir derfyn i'r hyn y gall y sector hwn ei ddatblygu.

Mae arloesedd yn gosod y diwydiant ar dân. Mae amrywiadau alcohol isel a dim alcohol o ddiodydd adnabyddus a hoff iawn wedi caniatáu i'r diwydiant gwrdd â thueddiadau defnyddwyr sy'n newid a chyrraedd marchnad ehangach, tra'n cefnogi mentrau iechyd cyhoeddus i leihau'r defnydd. Mae datrysiadau pŵer a storio newydd mewn bragu, a gyfeirir atynt yn astudiaeth achosi yn yr adroddiad hwn, wedi'u harloesi yng Nghymru yn arwain y byd ac yn ymgorffori natur addasol y sector.

Gan dynnu o hanes diwylliannol cyfoethog tafarnau a bragdai Cymru, gellid datgloi sector twristiaeth Cymru i gynhyrchu incwm enfawr i awdurdodau lleol tra'n creu a chefnogi swyddi hyblyg o ansawdd uchel.

Am ddegawd mae cyflwyno ardoll ymwelwyr yng Nghymru wedi cael ei drafod. Ym mis Tachwedd 2024, cyflwynwyd y Mesur Llety Ymwelwyr (Cofrestr a Levy) Etc. (Cymru) i'r Senedd. Er bod hyn wedi cael ei brofi i weithiau gael effaith gyffredinol gadarnhaol, fel y mae Llywodraeth Cymru wedi ymchwilio'n fanwl, mae'r gwasgfa gwariant defnyddwyr wedi achosi pryder i Gynghrair Twristiaeth yr Alban, lle mae ardoll debyg wedi'i chyflwyno.

Bydd mynd i'r afael â'r cynnydd mewn costau, cyfraddau trethi uchel, a phwysau rheoleiddiol cynyddol trwy bolisiau cefnogol ac arferion arloesol yn hanfodol ar gyfer llwyddiant yn y dyfodol. Bydd cynaliadwyedd, twristiaeth, ac arloesi cynnyrch yn parhau i gefnogi ffyniant y diwydiant hwn ac yn cyfrannu at economi Cymru ar lefel leol a chenedlaethol os bydd llunwyr polisi yng Nghaerdydd a Llundain yn cymryd yr alwadau yn yr adroddiad hwn i ystyriaeth.



1. Lleihau Toll Cwrw: Alinio toll cwrw gyda'r cyfartaledd UE i leihau'r cyfraddau presennol, sy'n sylweddol uwch.
2. Diwygio Cyfraddau Busnes: Addasu cyfraddau busnes i adlewyrchu realiti economaidd a chydbwysu'r anghydraddoldeb rhwng busnesau ar-lein a busnesau brics a mortar.
3. Adolygu Cyhoeddiadau Cyllideb: Adolygu ar frys y camau a'r effaith gronol o gyhoeddiadau Cyllideb, yn enwedig mewn perthynas â newidiadau Yswiriant Gwladol. Gan gynnwys ystyried cyfradd TAW is ar gyfer bwyd a diod a werthir mewn tafarndai i gefnogi twf, hybu twristiaeth, a darparu cydraddoldeb â archfarchnadoedd.
4. Ailystyried cyflwyno Treth Ymwelwyr: Mae'r dreth newydd hon yn cynrychioli cost fusnes ychwanegol ar y sector lletygarwch yng Nghymru, un y credwn y bydd yn effeithio'n negyddol ar incwm tafarndai os yw'n lleihau nifer y twristiaid. Fel lleiafswm, rhaid i'r arian a gesglir drwy dreth o'r fath gael ei neilltuo'n benodol ar gyfer cefnogi'r sector twristiaeth.
5. Rheoleiddio Cyflogaeth a Sgiliau: Sicrhau bod rheoliadau'n cefnogi twf a buddsoddiad mewn tafarnau a bragdy, gan gynnal hyblygrwydd ar gyfer patrymau masnachu tymhorol ac anrhagweladwy.
6. Cymhellion ar gyfer Buddsoddiadau Gwyrdd: Darparu rhyddhad treth a grantiau ar gyfer arferion cynaliadwy i helpu bragdy i leihau eu heffaith amgylcheddol.
7. Atgyweirio'r Farchnad Ynni An-Ddomestig: Gweithredu argymhellion Ofgem a deddfwriaeth ategol i atgyweirio'r farchnad ynni an-ddomestig yn barhaol.
8. Ffioedd EPR Teg a Chynaliadwy: Adolygu ffioedd EPR i sicrhau eu bod yn dechach ac yn fwy cynaliadwy, gan ganiatáu i fusnesau addasu gweithrediadau a chynllunio'n ariannol.
9. DRS Rhyngweithredol: Sicrhau bod DRS ar draws y pedair gwlad yn rhyngweithredol i osgoi cymhlethdodau a chostau ychwanegol.
10. Cefnogaeth ar gyfer Cynhyrchion Isel ac Heb Alcohol: Annog datblygiad a marchnata diodydd isel ac heb alcohol, ac ystyried disgrifiad 'cryfder is' ar gyfer cwrw nad yw'n fwy na 3.5% ABV.

Introduction

There are deep historical roots in brewing and pubs within Wales. Both the brewing of and consumption of beer feature prominently in the religious, agricultural, social, and economic development of the country over hundreds of years.

Brewing in Wales is a rich tapestry extending through to ancient times. The Celts brewed early forms of beer from local grains and wild herbs. Mead, a fermented drink made from honey, was also popular in ancient Welsh society. These early beverages took centre stage in social gatherings, celebrations, and rituals in the same way they do today.

The Industrial Revolution throughout the 18th and 19th centuries changed life in Wales; a boom in copper production in Swansea, Merthyr Tydfil becoming the world's iron capital, and Rhondda Valley's seemingly undiminishable coal reserves led to the rapid expansion of the working class and the creation of urban centres around the place of work.

Alehouses increased in number and importance, becoming a meeting point for workers, serving as a sanctuary from the tough conditions of the mines, factories and mills; lagers and ales became the working man's drink.

Production volumes ballooned for local breweries who began to commercialise, export and expand their supply chains to meet demand. The Felinfoel Brewery (case study ii) was the first brewery within the UK that manufactured and sold beer in cans during the 1930s.

The rise of microbreweries, and the craft beer explosion at the turn of the 21st century has once more revived local brewing traditions across the valleys. But the country has also attracted enormous multi-million-pound investments from international brewing giants. By far the largest brewer and packager of beer in Wales is the Budweiser Brewing Group (BBG) Brewery, part of AB-InBev, in Magor which was built in 1979. The Brewery is one of the largest in the UK, producing over 5 million hectolitres – equivalent to more than 880 million pints - every year.

Despite a series of seemingly insurmountable challenges such as spiralling energy costs due to the war in Ukraine, a cost-of-doing business crisis alongside the increased cost-of-living, unfair taxation levelled at bricks and mortar businesses, a shift in consumer habits, the introduction of DRS and EPR regulations alongside ongoing recovery from the COVID-19 pandemic, the pub remains an intrinsic part of life in Wales and across the UK.

Objectives of the report

This report will aim to assess the current market landscape in Wales, evaluating the size and profitability of the sector both economically and socially.

The State of the Nation 2025 will also evaluate the challenges facing the industry from both national and devolved policy environments, reviewing key government proposals and outlining strategic recommendations on how to navigate these difficulties and how to leverage emerging opportunities for sectoral growth.

This is the first time the Welsh Beer and Pub Association has carried out such a comprehensive assessment and evaluation of the economic and regulatory framework in which pubs and breweries in Wales make business critical decisions.

Coming a year before the 2026 Senedd elections, the publication of this report is timely, highlighting both the challenges and opportunities of the Welsh beer and pub sector to contribute to policy thinking as the parties turn their attention to preparing their manifestos and legislative commitments to help encourage greater economic growth and community cohesion.



Industry Overview

There are currently around 100 breweries in Wales¹¹, producing over 5 million HL¹² of beer and employing 1,300 people. As well as supplying beer to supermarkets, smaller shops and other on-trade venues, they supply beer to c. 3,000 Welsh pubs additionally providing employment to a further 22,000¹³ people in pubs up and down the country and 1,900¹⁴ in the rest of the on-trade and off-trade.

However, the current turnover performance of pubs in Wales is faring worse than the rest of GB. Turnover is frequently lower than the equivalent week the previous year, despite higher than usual price rises to cover increasing costs.

Importance of this sector to the Welsh economy and culture
 Fig. 1. Overall beer and pub sector's economic impact, Wales, 2022

Overall Beer and Pub Sector	GVA (£ million)	Jobs	Wage (£ million)
Direct	540	25,000	310
Indirect	420	8,000	190
Induced	530	10,000	210
Total	1,500	43,000	710

Source: CGA by NielsenIQ
 Source: ONS, BBPA, Oxford Economics. Note: May not sum due to rounding.

According to the WBPA's pub database, there were 2,924 pubs in Wales in 2024¹⁵, a decline of 63 since 2022 (3,006), and a decline of 189 since the previous report in 2019 (3,132). Pub numbers in Wales have been declining consistently since at least 2017, when there were 3,215 pubs in operation. This trend has been exacerbated by the Covid-19 pandemic and the recent inflationary environment, causing great strain on businesses across the region.

There were 103 breweries in Wales in 2023,¹⁶ an increase of two on the WBPA's previous figure for 2019 (101). This result contrasts with that for pubs, where overall numbers in the region declined.



Economic Impact

Economic Contribution

In 2022, the beer and pub sector contributed approximately £1.5 billion in Gross Value Added (GVA) to the Welsh economy. Of this, £540 million came from direct activities within the sector¹⁷.

Despite the challenges posed by the pandemic, the sector's total GVA contribution increased in real terms compared to pre-pandemic levels in 2019.

Indirect Impact: The sector's procurement of products and services from within its supply chain generated an additional £420 million in GVA.

Induced Impact: The spending of wages by those directly and indirectly employed in the sector contributed a further £530 million in GVA.

Employment

The sector supported approximately 43,000 jobs across Wales in 2022, with 25,000 jobs directly within the sector.¹⁸

An additional 8,000 jobs were supported indirectly through supply chain activities, and further 10,000 jobs were induced by consumer spending from those employed directly and indirectly in the sector.

Wages

The total wages paid by the sector amounted to £710 million in 2022. Including £310 million in direct wages, £190 million from indirect impacts, and £210 million from induced impacts.

Regional Impacts

The South Wales Central and South Wales East regions saw the highest economic benefits, with GVA contributions of £350 million and £360 million, respectively.

North Wales, Mid and West Wales, and South Wales West also saw significant contributions, with GVA impacts ranging from £230 million to £290 million.

Fig. 2. Estimated GVA benefits of the beer and pub sector, Welsh electoral regions, 2022.

Region	Direct	Indirect	Induced	Total
North Wales	100	80	90	260
Mid and West Wales	110	90	90	290
South Wales West	80	80	80	230
South Wales Central	120	90	90	350
South Wales East	140	100	100	360
Wales	540	420	530	1,500

Source: ONS, BBPA, Oxford Economics.



Subsector Performance

The pub sector was the largest contributor, supporting 38,000 jobs, £600 million in wages, and £1.2 billion in GVA in 2022. Despite a decline in the number of pubs from 3,132 in 2019 to 2,943 in 2023, the pub subsector's economic footprint remained strong, with an increase in GVA compared to 2019 levels.

The brewing sector supported 6,200 jobs, £150 million in wages, and £360 million in GVA. The number of breweries in Wales has actually increased since 2019, leading to growth in direct jobs, GVA, and wages.

On-trade, excluding pubs, which includes beer sales in hotels, restaurants, and sports clubs, struggled to return to 2019 levels, sustaining 2,300 jobs, £40 million in wages, and £80 million in GVA.

The off-trade subsector, related to beer sales in retail outlets, performed strongly, supporting 1,200 jobs, £20 million in wages, and £50 million in GVA. These figures represent an increase in all three metrics since 2019.

Tax Revenues

The sector contributed £1.2 billion in tax revenues to the Exchequer in 2022. The largest contribution came from excise duty (£450 million). The pub subsector generated the highest total tax contribution of £730 million, primarily through VAT receipts (£310 million). Breweries contributed £460 million, the rest of the on-trade £30 million, and the off-trade £40 million.

Capital Investment

In 2022, the sector saw £80 million in net capital investment. South Wales Central and South Wales East had the highest levels of net capital expenditure, driven by their strong GVA in the pub sector¹⁹.

Youth and Part-Time Employment

The sector offered significant employment opportunities for younger people and those seeking flexible working patterns. Approximately 40% of the direct jobs in the sector were held by individuals under 25 years of age, accounting for 10,200 jobs. Additionally, 56% of workers in the sector were employed part-time, which is particularly beneficial for those still in education, re-entering the labour market, or balancing work with family responsibilities. This underlines how important flexible working is to the sector.²⁰



GVA Growth ²¹

Despite the challenges of the COVID-19 pandemic, the beer and pub sector in Wales managed to increase its total GVA contribution in real terms from 2019 to 2022.

This growth is particularly notable given the sector's significant role in the Welsh economy.

Employment

The pub subsector saw a reduction in the number of pubs between 2019 and 2023, yet it maintained strong employment figures and even increased its GVA.

The brewery subsector also experienced growth, with an increase in the number of breweries and corresponding rises in jobs, GVA, and wages.

On-Trade

The on-trade subsector, excluding pubs, struggled to regain its 2019 levels, with declines in jobs, wages, and GVA. However, the off-trade subsector showed resilience, with increases in all key metrics.

Tax Contributions

Tax contributions from the sector remained substantial, with the pub subsector leading in total contributions.

The overall tax revenue generated by the sector in 2022 was strong, supported by a significant increase in VAT receipts.

Capital Investment

Capital investment in the sector was robust, particularly in South Wales Central and South Wales East, reflecting these regions' high levels of GVA and investment ratios in the pub subsector.



Policy, Regulation and Challenges

Business Rates

Business rates are often considered one of the biggest challenges to pubs across the country. Comprising a large amount of their fixed bills, the business rates burden is disproportionately paid by bricks and mortar venues like pubs. Across the UK, pubs pay five times what they ought to based on business turnover; public houses and bars account for 0.4% of total UK turnover yet we pay 2.1%²² of the business rates bill. The picture is similar in Wales.

As business rates is devolved, Wales has a unique opportunity to redress the disproportionate burden of rates for Welsh pubs. These opportunities include reforming business rates to implement a pub or hospitality specific multiplier which permanently lowers the taxation burden, instead of relying on reliefs as sticking plaster policies.

Despite Welsh pubs experiencing the same level of Retail Hospitality and Leisure business rates relief as England in 2023, net pub closure rates were twice as high. With relief in Wales dropping to 40% in April 2024 whilst remaining at 75% in England, this will have made the trading picture even worse for pubs in Wales than their counterparts in England. The average pub in Wales was £6,000 worse off than its English counterpart in 2024 due to lower relief and lack of a small business multiplier.

Since the UK budget in October 2024, and the Senedd budget in December 2024, the rate of relief sits at 40% for England and Wales for 2025/2026. However, England has taken the further step to outline long term reform through a sector-specific business rates multiplier.



Background

Pubs in Wales contribute £30m in business rates²³. At present public houses are valued using a specific method not common to other commercial premises, as set out in the VOA's Approved Guide developed in partnership with the industry.

The specific methodology used is because pubs do not tend to be let on a purely commercial basis, often with more complex, complementary partnerships between landlord and tenant (e.g. supply agreements, support from the landlord and other arrangements) and factors such as geographical location and type of operation are considered.

The current system is based on an outlet's 'Fair Maintainable Turnover' (FMT), the level of revenue that a reasonably efficient operator would be able to generate in the premises.

Because of this unique valuation method, it is important to consider how changes to the business rates system, which may seem positive or not disruptive, could have unintended impacts on businesses valued this way.

Reliefs

Failing longer-term adjustments to business rates, reliefs work to rebalance the business rates burden, allowing pubs to thrive.

The Retail, Hospitality and Leisure Relief has been instrumental in ensuring that pubs across Wales can continue to weather the challenges in the market, including record high energy costs, food and drink price inflation, and labour shortages. It was worth £7.1m to the sector in Wales, and without this crucial relief, it is certain that many more pubs would have had to close their doors²⁴.

Devolution with regards to Welsh business rates relief allows Wales to correct some of the recent oversights with the Non-Domestic Ratings Act (2023) in England, particularly regarding improvement relief, where Wales should resist implementing the same occupation condition for the relief. This is because the English legislation contains a blind spot regarding the unique partnership model that applies to pubs up and down the country, requiring pubs to be occupied by the same ratepayer for the entire period of the improvement and the relief window.

Without reflecting the close partnership between pub companies and ratepaying publicans, investment in partnership pubs may become a less desirable venture, crippling pubs when they need to improve, adapt, and modify their businesses to survive.

Non-domestic rating multipliers

The ability for Welsh Ministers to set differential multipliers for various businesses would be a great reflection and response to a number of the issues with business rates – including their current inflexibility and outdated approach to valuing businesses in a digital age. This would follow the precedent recently announced by the UK Government to implement two lower multipliers for retail, hospitality and leisure businesses to rebalance the business rates burden.

Being able to allocate multipliers based on the description of a venue, i.e. if they fall in the public houses category, would enable the Senedd to more accurately target business rates support and relief which has to date been so crucial.

Even before the deleterious impact of the Covid pandemic on venues like pubs, it had already become widely recognised that hospitality was being disproportionately impacted by business rates and that reform was urgently needed. UK-wide, hospitality accounts for 11% of all business rates payments, despite contributing only 3% of eligible income. Public houses and bars account for 0.4% of total UK turnover, yet pay 2.1% of the business rates bill. If the sector were paying at the average business rates to turnover ratio, the bill would be £130 million instead of £637 million, meaning pubs across the country are overpaying by £507 million. When looking at other sectors like wholesale and retail trade, the share of business rates they paid is less than the share of their total turnover by around 2 percentage points.²⁵

This burden is not sustainable for businesses which are already exposed to so many cost pressures, many costs which are now permanently higher than before the recent economic turmoil.



With England pursuing a lower sector-specific multiplier, Wales has the opportunity to match – or even better – their reforms. This could be achieved through applying the same lower rate to all pub businesses, regardless of size, and would give the largest benefit to small businesses, as small pubs in Wales currently miss out on the small business multiplier enjoyed by pubs in England.

A sector-specific multiplier would end the sticking plaster reliefs and provide much needed certainty to pubs in Wales, encouraging growth and investment.

Deposit Return Scheme

The full packaging reforms proposed by the UK government present a complex and interconnected system of regulatory obligations for brewers and pubs. EPR, PRN and DRS schemes will enforce concurrent, onerous, and expensive obligations onto producers.

Packaging costs for brewers increased 20% between 2019 – 2023, before EPR and DRS have even come into effect. With low margins and no room to absorb or pass on costs, it is essential that the government considers the inevitable cumulative impact of introducing DRS, EPR and PRN reform concurrently. Industry research shows that the concurrent and overlapping implementation of these schemes is adding millions of pounds onto business costs, not to mention thousands of hours of compliance work.

Producers need to understand the complete picture of complex packaging reforms in order to understand the costs to the sector and be able to plan accordingly. The proposed higher additional costs on brewers will impose an extra £160m or 5p per glass bottle on the sector, according to our research²⁶. This could force some brewers to leave the glass bottle market entirely, risking many heritage Welsh brands.

Manufacturers already operate on incredibly narrow margins, making an average of 2p per bottle of beer. The proposed increased costs will, therefore, almost certainly have to be passed onto the consumer.

Background

In November 2024, the Welsh government announced that it is withdrawing from the DRS process with the other three nations of the UK. Reiterating their high recycling rates, unique position in Wales and the desire to take Wales further, beyond recycling and move faster to reuse, the Senedd is planning to move forward with its own DRS with glass reuse as a focus and according to its own legislative timetable.

As a result, the implications are that Wales will not have a DRS in place in October 2027 as is the current timeline for England, Scotland and Northern Ireland, and probably not in time for the January 2028 backstop on exemptions for DRS in-scope products from EPR fees. This means that these products sold into Wales will likely incur EPR fees from January 2028.

The Welsh Beer and Pub Association's preference has always been for a four-nation approach on DRS, with full alignment and interoperability, to avoid the added complexity and costs different approaches create. However, the WBPA respect that Wales is already leading the way on recycling rates and its desire to go further to achieve a truly circular economy for packaging.

The Wales Factor

The Senedd has consistently pushed for the most comprehensive DRS scheme in the UK, looking to international neighbours such as Finland, Denmark and the US for inspiration on how to achieve its goal of being world leaders in recycling.

The Welsh government points to a joint consultation which found 86% of respondents in favour of including glass in the scheme and as such are determined to do so, but the UK Government has outlined several reasons for excluding it; including that glass creates undue complexity for the drinks industry, increases storage and handling costs for retailers, and that glass is littered less: the Keep Britain Tidy litter analysis of 2020 found that 55% of litter was from PET plastic and metal drinks containers, compared to just 4% from glass drinks containers.



The Internal Markets Act

The United Kingdom Internal Market Act 2020 (UKIMA) enshrines the principles of mutual recognition and non-discrimination across the shared market because the free flow of trade across the United Kingdom is vital to businesses and consumers.

The WBPA supports the future-proofing of DRS to allow for reuse at an appropriate time in the future when such a system is feasible, and we want to help support Wales' once-in-a-generation opportunity to get recycling right, without harming the producers and manufacturers that form the heart of Wales' diverse economy. Under current proposals, both the business community and consumers will be adversely impacted by the Welsh government's decision to include glass in scope of its DRS. Not only will it lead to higher industry emissions and split glass food and drink packaging into two waste streams, but it will also make it more difficult for consumers to recycle.

YouGov polling highlights that over 70% of people are satisfied with the current collection system for glass packaging and every single region in Great Britain would prefer to recycle their glass through kerbside recycling.

Wales is already achieving a glass capture rate of 87.3% as evidenced in WRAP Cymru's national municipal waste compositional analysis reflecting the world leading glass recycling already being achieved in Wales.

Public Health

Minimum Unit Pricing

The Public Health (Minimum Price for Alcohol) (Wales) Act 2018 was implemented on 2 March 2020. This law applies to all businesses, organisations and persons required to hold a license for alcohol.



Any retailer who sells or supplies, or authorises the sale or supply of, alcohol below the minimum price will be breaking the law and could be fined. It forms part of the Welsh Government's wider and continuing approach to reducing hazardous and harmful drinking in Wales.

Background

The Act aims to address some of the longstanding and specific health concerns around the effect of excess alcohol consumption in Wales.

It signifies a firm commitment to further improving and protecting the health of the population of Wales – and is specifically targeted at protecting the health of hazardous and harmful drinkers who tend to consume greater amounts of low-cost and high-alcohol content products.

The Welsh Government consulted on its proposed level of the MUP for the purposes of the Act and concluded that a 50p (£0.50) MUP is a proportionate response to tackling the health risks of excessive alcohol consumption. Consequently, the Public Health (Minimum Price for Alcohol) (Minimum Unit Price) (Wales) Regulations 2019 laid on 15 October 2019 specified an MUP of 50p. These were agreed by the National Assembly for Wales on 12 November 2019.

As part of the legislation, there is a sunset clause provision set for March 2026, which means the legislation will need positive assent to continue. The Welsh Government will be publishing independent evaluations in 2025, which will then be followed by a formal report ahead of debate in the Senedd.

Decision on the future of MUP, including if it continues and at what level, will then need to be made by the Senedd ahead of the triggering of the sunset clause. This period is an opportunity to objectively assess the pros and cons of an MUP, including if it is having the desired effect, as well as any unintended consequences on vulnerable groups. It is also useful to review the role of an MUP following the UK Alcohol Duty Review in 2022 which mandated that alcohol be taxed based on alcoholic strength.

Trends

Alcohol-related crime has fallen sharply over the last decade.

Alcohol-related deaths, which had been rising steadily since 1991, have also been relatively stable since 2008.²⁷

There has also been a boom in low-and no-alcohol drinks in recent years, reflecting consumer-driven trends towards reduced consumption. As of June 2023, in pubs, sales of low-and no-alcohol beer have jumped by 23% during the past year compared with the previous 12 months, and have more than doubled since 2019, just prior to the pandemic.

“One in three pub visits are alcohol-free.”

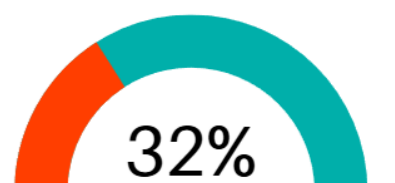
- 79% of adults do not exceed the CMO's recommended guidelines of 14 units per week and overall consumption is down 15% in the last 15 years
- Overall UK alcohol consumption is lower than in France, Germany, Spain and Ireland²⁸
- Binge-drinking among UK drinkers has fallen by 29% in the last decade
- Beer has an average strength of 4.2% and is a low strength product²⁹
- Research shows that substituting high alcohol beverages with low alcohol beverages, can reduce alcohol related harm
- There has been consistent year on year growth of 15-30%, in low and no alcohol beer, the biggest percentage growth of any beer category³⁰
- 86% of pubs now serve at least one low or no alcohol beer, up from 78% in 2019³¹
- Almost one in three (32%) UK drinkers either sometimes or often consume low and no alcohol products, compared to one in four (25%) in 2020.
- 83% of those who drink low and no entered the category through a brand-share product.



of UK adults do not exceed the CMO's recommended lower risk guideline of 14



of UK pubs now serve at least one no-and-low alcohol beer



of UK consumers either sometimes or often consume no-and-low products



decrease in UK binge-drinking over last decade



The Felinfoel Brewery, established in 1878, is the oldest brewery in Wales and is in the village of Felinfoel near Llanelli.

This development marked an important shift from small-scale local brewing to industrial beer production and distribution.

Felinfoel brewed its own beer initially in the local inn during winter months until the popularity of Felinfoel Beer meant brewing for other inns, thus creating a dedicated brewery in 1878.

The brewery built by the river Lliedi was to become an important focus of the community, employing approximately fifty people, providing hot water for numerous community needs, and spent grains for the farmers.

A villager later recalled:

“Nearly every family kept a pig in their garden. When the butcher was booked to kill a pig in the back yard, large cans of hot water were carried from the brewery to scrape and clean the pig. Some people living in the vicinity even carried hot water for their weekly washing. Ladders were borrowed, tools sharpened, any excuse to go into the brewery for a drink.”

Felinfoel Brewery played a very important role in the history of the tinplate industry by developing the canning of beer.

The weekly “Llanelli and County Guardian” recorded the historic moment on 3 December 1935, under the triple heading: ‘Canned Beer Arrives’, ‘Epoch-Making Process at Felinfoel Brewery’, ‘New Hope for Tinplate Industry’.

One of the highest accolades Felinfoel earned was when Prince’s Ale, brewed to coincide with the investiture of Prince Charles as Prince of Wales in 1969, won the coveted ‘Beer Can of the Year’ award.



Today, Felinfoel Brewery is run by the sixth generation of the founding family and is still brewing award winning beers in the heart of Felinfoel. There continues to be improvements and upgrades in the brew house to ensure the best quality of beer at all times. Felinfoel Brewery have 60 pubs and there is a big drive to elevate the pub estate, improve standards and become more environmentally friendly throughout all aspects of the business.

Felinfoel continue to can on site which they are very proud of and are looking forward to a bright future as Felinfoel Brewery continues to play an active part in the Welsh brewing industry.





SA Brains

Founded by Samuel Arthur Brain and his uncle Joseph Benjamin Brain in 1882, SA Brains is one of Wales' most iconic breweries, based in Cardiff. Over the past century, it has played a vital role in the Welsh brewing industry and Welsh cultural life.

The brewery started in Cardiff, initially producing 100 barrels of beer a week for eleven pubs.

By 1900, it had expanded production to 1,000 barrels a week, supplying 80 pubs. SA Brains became a limited company in 1897. A century later, it acquired the Crown Buckley Brewery in Llanelli, followed by Hancock's Brewery in 1999, consolidating its brewing operations in Cardiff.

Innovative marketing has been a hallmark of SA Brains, including its sponsorships of the Wales national rugby union team and the Crusaders Rugby League team.

In 2019, the company opened the state-of-the-art Dragon Brewery in Cardiff, reflecting its commitment to modernizing brewing facilities while maintaining its heritage.



SA Brains has significantly contributed to Cardiff's economy, creating and sustaining hundreds of jobs.

At its peak, it operated over 250 pubs across South Wales, Mid Wales, and the West Country, establishing itself as a key player in the regional and national economies of Wales.

Although most of its pub estate was sold in 2022, SA Brains continues to be a cornerstone of Welsh brewing, upholding its rich legacy and looking toward the future.



AB InBev



AB InBev is an international brewing giant; its Magor Brewery is situated in South Wales. Commissioned in 1979, this brewery has grown to be one of the largest and most innovative brewing facilities within the UK. The brewery is well situated at Magor and is supported by the ready availability of skilled labour, proximity to the motorway network, and an ample water supply from the Great Spring.

Magor Brewery is at the forefront in sustainable brewing. The brewery uses 100% British-grown barley, locally produced from British farmers, maintaining a tight domestic supply chain.

In 2020, the brewery eliminated plastic rings from production, after investing £6.3 million in new canning lines and technology. The innovative technology, called Keel Clips, uses recyclable paperboard to create a lighter weight pack. The innovative technology, called Keel Clips, uses recyclable paperboard to create a lighter weight pack.

The brewery has also reduced its use of plastic shrink wrap by 600 tonnes. In 2021, it was announced that an investment of \$85 million in green technology including the installation of the “world’s largest wort cooler” had reduced

the site’s water and energy use by more than 10%.

The brewery receives most of its electricity from solar farms and the remainder direct from a single wind turbine, which is among the largest in the UK.

The brewery produces more than one billion pints every year, including popular brands like Budweiser, Corona, Stella Artois, Leffe and Becks, sold throughout the UK and as such, directly contributing to the wider economy. Corona Cero, the brewery’s flagship low-and-no option has helped popularise alcohol alternative beer options across Wales, through a series of high-profile marketing campaigns and sponsorships, most recently partnering with the 2024 Olympics, the first no alcohol beer to do so.

In 2022, the Brewery invested in a further expansion, to provide a production line for kegs for Perfect Draft, the home beer experience, plus a laboratory and additional office space.

Magor Brewery is also a significant local employer with the brewery manager being an ex-apprentice, who has gone onto champion apprenticeships within the brewery.



Future Outlook

Economic Conditions and Regulatory Environment

Inflation and the rising cost of both living and doing business have increased the price of raw materials, energy, and labour, making beer more expensive to drink and pubs more expensive to run. This can negatively impact consumer spending and profitability in the sector. The UK's economy had zero growth in the third quarter of 2024.³² According to the Resolution Foundation, wages in the UK have been stagnant for 15 years.³³

This sluggish economic environment has contributed to the contraction of the sector.

High beer duty and an unfair business rates system have posed significant financial burdens on the sector, hindering growth and expediting closures by narrowing profit margins. While a permanent reform of the business rates system in England is an active policy proposal, in Wales, a solution outside of relief is not being actively discussed.

Employment costs, both from a National Insurance and a National Minimum Wage perspective, will massively impact the sector which overwhelmingly employs young people. Approximately 40% of the direct jobs in the sector were held by individuals under 25 years of age, accounting for 10,200 jobs³⁴.

Recommendations:

- Lowering beer duty toward the EU average. Current rates remain almost three times higher, and over twelve times higher in some countries
- Reform Business Rates: Adjusting business rates to reflect the economic realities of the sector and rebalancing the disparity between online and brick and mortar businesses will alleviate financial pressure on pubs
- Urgently review the phasing of Budget announcements and the cumulative impact of these; particularly in relation to National Insurance changes
- Review the case for a lower rate of VAT for food and drink sold in pubs to foster sustainable growth, boost tourism, and provide parity with supermarkets
- Employment and skills regulation that underpins growth and investment in pubs and brewers and maintains the flexibility needed by pubs and other sectors that are subject to seasonal and unpredictable trading patterns. Full consultation with the sector to ensure proportionate proposals and avoid unintended consequences



Sustainability and Technological Advancements

Innovations in sustainable brewing practices and packaging can attract environmentally conscious consumers, positively impacting the sector.

However, within the economic environment set out in this report, the upcoming introduction of EPR fees and DRS is a huge concern for the sector from both a profit and a compliance standpoint.

Recommendations:

- Incentives for Green Investments: Providing tax relief and grants for sustainable practices can help breweries reduce their environmental impact
- Implement Ofgem recommendations, reforms and supporting legislation to permanently fix the non-domestic energy market
- Fair and sustainable costs: EPR fees should be reviewed to ensure that they are fairer and more sustainable, to allow businesses time to adjust operations accordingly and plan financially, and so that the sector can continue to play a critical role for Wales' economy and employment
- Interoperable DRS: working together to achieve shared goals in recycling and reuse, DRS across the four nations should be as interoperable as possible, to avoid the added complexity and costs of different DRS approaches

Consumer Preferences

There is a growing trend towards no-and low-alcohol beverages as consumers become more health-conscious and younger generations move away from alcohol consumption.

This had already spurred huge innovation in the sector with many brewing stouts, lagers and pale ales with no or low alcohol content. 86% of pubs now serve no-and-low beers³⁵ (up from 78% in 2019) and over 120m pints of no-and-low beer sold in 2023.

Recommendations:

- Support for no-and-low alcohol products: Encouraging the development and marketing of low and no-alcohol beverages can cater to health-conscious consumers.
- The Government should also consider a 'lower strength' descriptor for beers that do not exceed 3.5% ABV. This would further contribute to government objectives to increase availability of low strength options for consumers and is aligned with the recent introduction of a lower rate of alcohol duty for such products, reflecting their lower strength nature overall.
- Responsible drinking campaigns: Promoting responsible drinking can enhance the sector's image and appeal to a broader audience.



The beer and pub sector in Wales can achieve significant growth through a series of targeted policy recommendations.

Tax and business rates reform is essential, with a focus on reducing beer duty to make beer more affordable and competitive, and adjusting business rates to better reflect the economic realities of the sector.

This will alleviate financial pressures on pubs, allowing them to thrive.

Support for innovation and sustainability is also crucial, including the implementation of incentives for green investments through tax relief and grants. This measure would help breweries reduce their environmental impact, and provide government funding for training programs to aid pubs and breweries in adopting digital technologies, enhancing their competitiveness.

Additionally, promoting tourism and local engagement can boost the sector, with campaigns highlighting the cultural and historical significance of pubs and breweries to attract tourists would help stimulate local economies.

Funding and encouraging community initiatives will strengthen the social role of pubs and the communities they call home.

Finally, health and well-being initiatives such as supporting the development and marketing of low and no-alcohol products to cater to health-conscious consumers, and promoting responsible drinking campaigns, can enhance the sector's image and broaden its appeal.

By implementing the recommendations outlined above, the beer and pub sector in Wales can thrive and contribute positively to the local economy and community well-being.

Endnotes

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