

**The Simonds Brewing Company
of Reading**

1875-1914

**Seen in the Context of the General Economic
Condition of the English Brewing Industry**

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AN ABSTRACT

This dissertation looks at the economic progress of the H&G Simonds brewing firm between 1875 and 1914 as the largest brewery in the town of Reading. Inferences have been made occasionally where the sparse data has been insufficient, backed up by official government reports relating to Reading. The study will compare this one firm against the background of a long-term decline in the national brewing industry.

The first part considers the growth of commercial brewing firms and the decline of the small, traditionally-operated concerns. This involves investigations into the national trend of mergers, incorporations, and tied-house purchases characteristic of the early period of study.

Next will be a look at the financial problems facing Simonds and the industry, growing restrictions on retail outlets and the special case of Simonds' markets, declining beer consumption per capita after the late 1870's, and the uncertainties of profits.

The last part studies the economic and social factors affecting beer consumption, and how Simonds and the industry responded, in the context of rising real wages and the decline in the relative importance of brewing as a productive activity.

Chapter One

The English brewing industry underwent many sharp structural transformations in the last quarter of the nineteenth century. It was intensive and therefore very susceptible to changes in the level of consumption. This was a period of technical developments in the production process and of large inputs of capital investment. Growth depended on constant increases in revenue; a growth that had as yet unknown organisational limits.¹ The very nature of the brewing industry during this period, however, was that increasing numbers of market outlets had to be secured, and near to centres of growing population. The undertaking of this was beyond the financial constraints of most firms, and they increasingly found amalgamation as one answer to economic growth, as it meant that existing outlets could be rationalised and the available pool of technical skill be consolidated. Such mergers were only financially possible for the larger and intermediate-sized firms, and consequently this period is one characterized by the decline of the small and private brewers and the rise of the much larger common brewer. As Vaizey points out, those firms producing less than 10,000 barrels a year were at an ever-increasing disadvantage.² Simonds by the 1870's had an output of

¹ J E Vaizey, 'The Brewing Industry', in P L Cook(ed) 'Effects of Mergers', George Allen and Unwin (1958), p398

² Ibid

approximately just over 20,000 barrels a year,³ compared with 1000,000-200,000 for the nationally well-known firms such as Whitbread or Barclay-Perkins.

Mergers by and between the larger commercial breweries were economically linked to market situations, as indicated above. They were not only take-overs into some of the retail outlets such as publican brewers, but were indicative of a trend in the brewing industry for ever-increasing control of, and forward movement into the retail side of the drink trade. This was a period of relative price stability coupled with a long term decline in consumption, and extra retail outlets were required to ensure economic returns to scale. Furthermore, the other advantages to the commercial brewer were obvious, since production of this perishable product, beer, could be geared to demand more easily and thus avoid unnecessary waste. Therefore, the tied-house system became a standard feature of the brewing industry and, with the growing restrictions set by magistrates on the issue of licences at this time, led to fierce competition between rival brewing firms.

Another characteristic of the brewing industry at this time, and especially in the 1880's was the development of company flotations on the Stock Exchange. This coincided with a sharp decline in beer and spirit consumption which provided the impetus for brewing firms to safeguard themselves with limited liability as well as securing access to large amounts of capital without giving up the control of the companies. This conflicts with the view of Vaizey who saw mergers and then incorporation as the result of expensive technological development in the brewing industry. Many brewing companies did not implement these discoveries or developments until several years after incorporation.

Arthur Guinness was the first large firm to issue shares in 1885, and after this there began a wave of company flotations, since the public considered brewing shares to be a safe, lucrative investment. Much of the capital raised this way by the larger brewing firms was utilized in the buying-up of as many retail outlets as possible. This led to the so-called 'Brewers' Wars' of the late 1880's, since the available supply of public houses and beer-houses for sale rapidly diminished, with the obvious consequences of fierce competition. As a direct result, many smaller or less-efficient brewing firms were forced out of business or taken over. Between 1890 and 1900 the actual number of separate breweries declined sharply from over 11,000 to 6,460.⁴ Moreover, the greater part of this decline was accounted for by mergers between local, fairly small breweries. And it was these intermediate-sized firms that bought up existing outlets just as much was the case with the larger concerns. The economic growth of the locally oriented firms was very much dependent on this.

It is into this category that the Simonds brewing firm may be fitted. From producing 19,000 barrels pa in 1860, this figure reached 111,000 barrels by 1890 and 195,000 by 1913. In terms of national growth in output, these figures do in fact represent Simonds'

³ T A B Corley, 'The Simonds Brewery, 1760-1960', unpublished article, University of Reading, p 14. I am indebted to Mr Corley for granting me access to his work on the Simonds Brewery. There exists little reliable data on the firm, but Mr Corley has managed to extract what relevant information there is in his works on the industries of Reading at this time and allowed me to make use of it in this dissertation.

⁴ J E Vaizey, 'The Brewing Industry', p407

experiencing absolute and relative growth throughout this forty-year period. Respectively for the above three dates, Simonds' output as a percentage of total UK output was 0.01%, 0.35% and 0.56%.⁵

Reading in the second half of the nineteenth century was a fairly rapidly expanding town in terms of population and economic growth. The class structure was characterized by a fast-increasing middle-class element. Despite this, however, Dr Stephen Yeo has indicated in his research on Reading around this period, that, "In Reading and its immediately surrounding county area there was a lack of concentrated pre-capitalist ownership and wealth."⁶ The Simonds brewery, however, had been a family concern from the start, and so profits had been ploughed back. From 1811 to 1868, for instance, no capital at all had been raised from outside the family, even though this was a period of growth for the firm, especially in the 1860's. In point of fact, the brewery frequently undertook banking activities by accepting deposits from outsiders, (amounting to £2,300 by 1872), and lending money on mortgage to public houses that sold their liquor.

Raising capital this way within the family gave a good deal of security to the firm, but it was no cheaper than raising it from alternative sources. Simonds had a large burden of high prior charges, and it was not unusual for more than 60% of income to be accounted for by interest and annuity payments to retired partners.

As was common with other commercial brewers, much of this capital was utilized in purchasing tied houses, as a means of securing guaranteed outlets and so rationalizing wastage out of production. Parliamentary Papers of 1890-91 show that for 199 licensed premises in the Borough of Reading there were 17 registered owners. Of these, 10 were breweries, all located in the Thames Valley, Simonds being the largest owner with 59 premises, compared to the next largest brewery which had 26.⁷ A fairly typical entry in the company's Minute Book shows that between January and March 1891 the firm had decided to offer £1,000 for a tied-house in nearby Sunninghill, and £1,200 for a beer-house in Portsmouth. All the while that commercial brewers were purchasing these licensed premises the number of publican brewers and 'beer-on' brewers, who produced their own drink, was falling drastically from 29,381 in 1870, 9,392 in 1890, 4,361 in 1900, to only 2,284 by 1914.⁸

That the brewer owned the tied houses was necessary at a time when the number of market outlets still for sale was relatively declining and larger output of beer was possible through modernization of plant and equipment. Investigations of Simonds' economic performance during the latter half of the nineteenth century do show that in creating outlets their activity was not just concentrated in increasing the number of tied houses.

⁵ T A B Corley, 'The Simonds Brewery', p14

⁶ Dr Stephen Yeo, 'Religion and Voluntary Organizations', unpublished Phd thesis,

⁷ "Returns Relating to On-Licences", Parliamentary Papers, LXXIII, 1890-91, p5

⁸ G B Wilson, 'Alcohol and the Nation (A Contribution to the Study of the Liquor Problem in the UK from 1800 to 1935)', Nicholson and Watson, London, (1940), p86

TABLE 1⁹
SIMONDS BREWERY

Number of Tied-Houses	Annual Output (000's std barrels)	Year
37	12	1837
79	65	1872
158	112	1896

Table 1 shows that although there was a four-fold increase in the number of tied houses in sixty years, there was also a nine-fold increase in beer output for Simonds. Tied houses were therefore of great importance to the firm, but in relation to alternative market outlets they were declining in importance. More detailed account of these will be mentioned later in this paper, because their importance to Simonds will be seen in the fact that the firm managed, to a large extent, to avoid the bottleneck in outlets that increasing restriction on licensed premises brought in the last quarter of this century.

Although Simonds may have overcome the more general problem of market outlets, in line with most other brewing firms in the late 1870's and 1880's, it began to experience difficulties of scale. Brewing had become much more of a scientific process rather than a traditional craft, with the introduction of cooling processes for fermentation, larger vessels, and scientific instruments. To improve the product meant heavy capital expenditure on large-scale modern brewing equipment, expansion of the brewing premises, and increasing development of the distribution services. Much of this had been undertaken after the high consumption figures of the mid-1870's when prospects for the brewing industry were favourable. By the next decade, however, consumption had declined and many firms began to suffer from problems in economies of scale.¹⁰ Furthermore, this was a period of rising input prices, especially in wages and raw materials. For Simonds this was reflected in the changing pattern of final cost per standard barrel,¹¹ as can be seen from the limited data on Simonds re costs in Table 2.

TABLE 2
SIMONDS BREWERY ¹²

Date	Final Cost per Standard Barrel
1852/3	11/5
1856	8/6 (a low)
1873	14/6
early 1890's	17/-

⁹ T A B Corley, 'The Simonds Brewery', p8

¹⁰ J E Vaizey, 'The Brewing Industry', p400

¹¹ By 1875 all beer was sold in barrels of uniform quality and specific gravity

¹² T A B Corley, 'the Simonds Brewery', p10

The expansion in output and capacity of Simonds after the 1860's had led to a fast growth in the workforce. From employing only 32 people in 1851 with a total wage bill of £1,100 pa this increased so that by the 1890's there were 200 wage labourers and 35 salaried workers paid £10,400 and £4,250 pa respectively. On top of this there were a further 200 employees engaged in branch offices and outlets elsewhere in the UK and abroad.¹³

With an increasing number of office staff in this period, there exist more accurate accounts which give a better picture of the difficulties the firm was experiencing in terms of costs. For 1872, for instance, 50% of turnover amounting to £62,000 was accounted for by working capital. This consisted of raw materials whose price and supply are subject to annual fluctuations and uncertainty. A further 35% of turnover was accounted for by other fixed and working costs, such as wages, depreciation, etc. Finally, 15% went as payment on prior charges such as annuities and the remainder as profit.¹⁴ Parallel to this increase in unit costs was the increasing problem of finance. In the same year, 1872, the total capital and reserves of the three Simonds partners at £71,000 only amounted to 40% of total liabilities.¹⁵ This was a period of expansion for the firm, and the need to raise capital from outside was a serious one.

To begin with they borrowed from the J & C Simonds Bank in Reading, which was owned by close relatives: £16,000 in 1873 and then a further £21,000 in 1883. The three brewing partners, however, needed a stable, secure and relatively easy method of raising capital that still gave them effective control of the brewery. As has already been pointed out, the 1880's was a period of many company flotations on the Stock Exchange, especially amongst commercial brewers. Consequently, H & G Simonds merged in 1885, and was now only one of twenty breweries, out of a total of 2,250, that had incorporated.

H & G Simonds Ltd had authorised capital of £500,000, divided equally between ordinary and non-voting preference shares of £20 each. Initially, £144,000 of 5% preference shares and £180,000 of ordinary shares were issued, all to the three ex-partners who subsequently became the three directors.¹⁶ This was quite typical of most medium-sized brewing companies that had incorporated. As P L Payne put it in his analysis of the growth of limited companies in Britain at this time, "The control of most brewing companies remained in the hands of the old-established brewing families, even when it was 'concealed behind the mask of incorporation'.¹⁷ The advantage of issuing shares or debentures was that the companies immediately had large supplies of capital without losing control of the running. GB Wilson expresses the rationale behind incorporation, "...being fully alive to the profitable nature of their undertaking, they (the

¹³ *ibid*, pp8&9

¹⁴ *ibid* p9

¹⁵ *ibid* p19

¹⁶ *ibid*

¹⁷ P L Payne, 'the Emergence of the Large-Scale Company in Great Britain, 1870-1914' in *Economic History Review*, 1963, p532

brewers) offered the public the security and themselves kept that with which they were better content, namely the ordinary profits of the concern.”¹⁸

Nationally at this time there was a speculative ‘boom’ in purchasing brewing company shares. Brewing firms were considered safe investments, and since the capital assets were predominantly in real property, there was a rush to buy this type of share. Stock was in fact always over-subscribed, and the very large number of shareholders gave brewing companies “an obvious political significance”¹⁹ at a time when the issue of licences was being restricted and there existed pressure aimed at the decrease of beer consumption. Simonds, however, was a private limited company, and no shares were issued outside the family. In fact, apart from the issuing of £24,000 of preference shares to a family member in the late 1880’s, there was no change in the size of issued share capital until the 1920’s. The ordinary shares with voting rights were exclusively kept by family directors, this keeping exactly the same degree of control on the firm as had been the case before incorporation. This holding of voting shares around the boardroom table was similar to the situation in the other large private limited company in Reading, Huntley and Palmers Ltd.

Chapter Two

In the years between 1886 and 1900 over £185 millions of brewing issues were made.²⁰ Some of this was by the large brewing firms that needed extra capital to continue expanding; some was by several small firms merging together on a capital issue. But by far the most important numerically was the share issue of the private, medium-sized family firms. These “did not involve any merger as a basis of issue ... however, most of these firms expanded by merger subsequently.”²¹

The ‘boom’ in share issue did, however, require firms to make higher profits and turnover if they were to receive any part of the capital that investors were willing to part with. At first this involved the competitive rush to buy up as many retail outlets as possible leading to the ‘Brewers’ War’ that has already been referred to. Simonds increased the number of its tied houses by well over 100% during the period under study. Moreover, its output increased by substantially more than this. Expansion came not only from the acquisition of more retail outlets, but also by lower unit costs,²² extension of the brewing premises, and the installation of new equipment. As Vaizey puts it, “It is not surprising to find growth and merger going on side by side; in some

¹⁸ GB Wilson, ‘Alcohol and the Nation’, p86

¹⁹ *ibid*

²⁰ J E Vaizey, ‘The Brewing Industry’, p403

²¹ *ibid*, p405

²² *ibid*

cases the extension and improvement of a large brewery could only be undertaken if accompanied by amalgamation.”²³

This was the case with Simonds, who, after incorporation, proceeded to take-over other brewing companies in the region as well as installing new equipment to improve the production and reduce unit costs. For example, H & G Simonds Ltd Minute Book records the attempts to purchase Hewett’s Brewery in Reading in 1898 from an initial offer of £44,000 to a final buying price of £55,000. As regards extensions of the premises there is for 1899 the acceptance of a £12,000 tender for the building of two new malthouses. And Simonds was one of the few firms to seriously use concrete as a building material at this time.

Like many other brewing companies of this period, Simonds financed this growth with debenture issue as well as share issue. In 1896 it had £150,000 worth of 4% debentures, increasing this to £275,000 three years later.²⁴ The immediate advantage of this to the firm was still the retention of company control and a quickly obtainable source of capital. As has been mentioned before, however, much of this kind of capital was used in purchasing tied houses. The increase in demand for this kind of outlet, together with the severity of magistrates in closing down public houses or refusing to issue licences “drove their (the tied-houses) prices up to two or three times their pre-1886 levels.” Vaizey continues: “...but although the prices paid for this property were justified at the time of purchase by the rise in share values, eventually it was seen that the capitalization was based upon over-optimistic estimates and serious financial difficulties followed.”²⁵ This type of situation left firms vulnerable to downward movements in sales and profits, since investors might well redeem their investments and generally become cautious of brewing company shares in periods of adverse trading conditions.

In fact, after 1900 the demand for beer declined sharply as it had done in the late 1870’s.²⁶ This was not countered by any increase in beer exports, and consequently national output of beer fell absolutely as well.²⁷ Most brewing companies had by this time already been heavily capitalized with debentures based on previous high profits, and had been operating on narrow margins. As a result many firms fell into financial difficulties so that by 1913 there had been a decline in ordinary share value of 27% and a decline in debenture value of over 31%.²⁸ Some firms had to write down or write off considerable amounts of capital, so that by 1913, out of £107 millions of shares at par value, more than £20 millions had been lost.²⁹ Brewing shares were now treated with much distrust and uncertainty by investors.

There is no evidence to suggest that Simonds wrote down any of their capital, although the company Minute Books that exist for the period 1891-1898 do record a steady

²³ Simonds was experiencing higher unit costs at this time however.

²⁴ T A B Corley, ‘The Simonds Brewery’, p13

²⁵ J E Vaizey, ‘the Brewing Industry’, pp 405/6

²⁶ P L Payne, ‘the Emergence of the Large-scale Company’, p542

²⁷ 8 See Appendix 1

²⁸ G B Wilson, ‘Alcohol and the Nation’, p88

²⁹ *ibid*, p88

decline in the dividends paid out to the shareholders each year, from 12% in 1891, 8% in 1893, and 5% in 1897. But nevertheless, Simonds had managed to maintain increases in its total output during this period of falling share values because it had long since managed to establish alternative retail outlets, of which more will be discussed in the next chapter. Its output increased substantially and steadily from 112,000 std barrels in 1896 to 195,000 std barrels by 1913.³⁰ However, along with the national experience, the profits of H & G Simonds Ltd were declining fairly constantly from 5/6 per std barrel in 1885 to only 2/8 by 1913. Even taking into account the interest repayments on debentures, profits for this year were still only 3/8 per std barrel.³¹ Yet the brewing industry quickly responded to the depression in its trade. For example the Brewers' Society was formed in 1904 to reduce price competition between neighbouring firms and to exert unified political pressure. The directors of Simonds figured prominently in the Reading branch, and, as with firms nationally, undertook the exchange of tied houses it had in other areas to the mutual benefit of the brewing trade. Simonds had done this as early as 1891 when it negotiated with the Morland Brewery in Abingdon, west Berkshire to exchange its tied-houses in that town for Morland's premises in Reading.³² The decline in the industry was not halted by such measures of rationalisation, however, for there still existed diseconomies of scale that a reduction in competitiveness would not be able to amend.

Chapter Three

One particular feature of the Simonds brewery was in its variety of retail outlets both in the UK and abroad. It had already established itself as a supplier of beer to the Army based in Sandhurst as early as 1812, and even in 1834 had experimented with the exporting of pale ale to Australia, at a time when pale ale was a novel product. Most of the other brewing firms of comparable size to Simonds had mainly concentrated distribution to the local market. But Simonds was strategically placed in an area rapidly being settled by the Army, namely Sandhurst and Aldershot. At the same time it was succeeding in creating more outlets at railway station refreshment rooms, and had established branches abroad in Malta and Gibraltar.

Its initial links with supplying beer to the Army canteens in Berkshire during the early part of the nineteenth century marked the beginning of a long economic relationship. After securing outlets at these garrisons Simonds expanded its offices into other areas that had connections with the armed forces. By 1881 it had ten more branches in the UK at places such as Portsmouth, Woolwich, Exeter, and Oxford, all of which were directly controlled from Reading.³³ The obvious advantage to Simonds from these links

³⁰ TAB Corley, 'the Simonds Brewery', p14

³¹ *ibid*

³² 'H & G Simonds Ltd Minute Book' entry for 27/3/1891

³³ TAB Corley, 'the Simonds Brewery', p9

was that it could expand its output and its catchment area without having to purchase large numbers of tied houses. It was thus freer than most firms of the constraints of having to increase retail outlets by purchasing them outright.

From supplying the Army at home Simonds next provided beer to garrisons stationed abroad. The first such branch was established in Malta in 1875, to be followed by one in Gibraltar in 1881. As early as 1858 Simonds had been manufacturing lighter types of beer, especially pale ale, to accommodate the changes in tastes. Their own brand called 'SB' had a far longer life than the traditionally strong 'XX' and 'XXX' varieties, and was thus well suited for export. It proved very popular and accounted for over 55% of Simonds' total output by the 1870's.³⁴

H & G Simonds continued to expand its outlets through the Army during the 1890's. A branch was set up in Dublin in 1892; trade commenced with Egypt in 1893; bottled beer was exported to West Africa in 1894; a tender was put forward to supply troops in the Curragh area of Ireland in 1897; and beer was provided to the Army engaged in the Boer War in 1899.³⁵ All of these demonstrate the value to Simonds of having guaranteed markets for its produce abroad. For the brewing industry as a whole, however, the exporting of beer was not particularly rewarding. This was a period when growth in consumption at home had not been declining a rate as fast as that of the late 1870's and early 1880's, and so the expense and uncertainty of establishing branches abroad made foreign markets unattractive to most firms in relation to domestic outlets. In terms of value, exports became less important up to the end of the century. In terms of volume, they changed very little. Appendices 11 and 111 show the decline in the value of exports until this was reversed at the beginning of the twentieth century, and the constant decline in the selling price of beer abroad from 85/6 in 1882 to only 65/8 in 1914. Despite the fact that exports of beer were encouraged by the Inland Revenue by returning to the brewer the 6/3 per barrel excise duty on each exported barrel, the situation in 1885 was that "the export trade in beer has not increased during the last 20 years."³⁶

Looking at the two main outlets abroad for Simonds, namely Malta and Gibraltar, it is evident that in terms of value and volume, however, exports were increasing, except for a temporary decline for Gibraltar in the mid-1880's. Unfortunately, no data exists of export figures for Simonds, but it is highly probable that with the establishment of branches on these two islands Simonds did increase its export figures. For this see Table 111.

With regards to other alternative retail outlets, Simonds had had connections with railway companies since the 1840's when one of the partners had been chairman of the Great Western Railway Company.³⁷ As the national railway network expanded during the nineteenth century it became a good potential customer for the provision of refreshments to the passengers. Railway companies only rarely took up the managing

³⁴ *ibid*

³⁵ Source: H&G Simonds Ltd Minute Book, entry for 27/4/1899

³⁶ '28th Report of the Commissioners of HM Inland Revenue', 1885, p19

³⁷ Brunel is recorded as referring to him as a "hot warm tempered Tory", in LTC Ro 'IK Brunel', 1970

of their station refreshment rooms, but in the main invited tenders from catering or brewing firms.

TABLE 111
Total UK Exports to Malta and Gibraltar ³⁸

MALTA			GIBRALTAR	
Year	Quantity	Declared Value £'s	Quantity	Declared Value £'s
1875	7,853	24,964	14,520	47,886
1880	11,352	34,310	15,244	47,014
1885	15,459	57,628	13,245	43,464
1890	23,060	82,468	16,936	56,353
1895	27,997	95,405	17,793	61,883

By 1877 Simonds had secured a contract with the South-Eastern Railway Company to supply beer for, and run its refreshment rooms at stations in London and Kent. This relationship was to continue for some time, and an entry in Simonds' Minute Book for August 1891 confirms the renewal of a contract for a further seven years at £7,700. There were obvious advantages to Simonds in this kind of outlet since this period of the nineteenth century is characterized by a rapid growth in passenger traffic on the railways. Also, by 1883 Simonds secured another outlet with the South-Western Railway Company's stations at Waterloo, in Hampshire, and even in Devon. Then in 1892 they offered £18.00 at the tender for refreshment rooms with the London, Brighton, and South Coast Railway company, although it is not recorded if they were successful in this since another brewing firm, Browning and Hart, had offered £20,000 for the lease.³⁹ Later on, in 1897, there is another entry in the Minute Book confirming the decision to open a branch in Swindon, an important railway-oriented town.

Closely linked with the establishment of retail outlets with the railways was the security of contracts for supplying beer to entertainment businesses in coastal resorts. The availability of cheap railway travel to the working and lower-middle

Classes in the last quarter of the nineteenth century brought about a new pattern in leisure. Coastal resorts like Brighton and Scarborough had already been popularised by the rich at the beginning of the century. And with the rise in real wages for sections of the working-class population in the last decades of the nineteenth century, this form of leisure became widespread throughout the country. Railway companies provided cheap excursions to these resorts, the demand for which more often than not exceeded the number of carriage places.

His marked social change was reflected for Simonds in its establishment of retail outlets in the refreshment rooms at Southend Pier in 1891, at Hastings Pier in 1892, and at

³⁸ 'Customs 9, Ledger of Exports from the UK:Under Articles', HM Customs & Excise

³⁹ H&G Simonds Ltd Minute Book, entry for 9/6/1892

South Parade Pier in Southsea by 1893. Furthermore, in 1897 H & G Simonds Ltd secured a contract with the Surrey Cricket Club at a rental of £300 pa to manage and supply the refreshment room at the Oval.⁴⁰ This too was indicative of marked social changes characteristic of the late nineteenth century, many of which were, however, detrimental to the brewing industry as a whole and which will be discussed later on in the paper.

It is interesting to note that amongst some of those who subscribed to the ideals of temperance, the growth of the railway network was seen as one factor in the reduction of beer consumption per capita. G B Wilson quotes from several station managers and railway company directors who believed that due to the railways providing greater opportunities for working people to travel out of urban areas, they were therefore playing a role in moving people out of “certain temptations”.⁴¹ The Chairman of the North-Eastern Railway Company went on record as saying at an AGM, “Drink and travelling are in a sense competitive businesses. We shall be able to claim for railways that they are really a great branch of practical social reform.”⁴² No data could possibly exist to fully substantiate such claims, and it must be left in doubt whether the growth of rail travel for most of the population could affect beer consumption. Harrison, looking at the decline of licensed premises with specific reference to coaching-inns, does see railways as particularly responsible in affecting public houses that also served as transport centres, “for by speeding up travel and increasing its comfort, the railway reduced the need for refreshment on the journey.” He proceeds, however, to analyse Charles Booth’s map of London at the end of the century and concludes from this that; Nevertheless, the 1899 map shows the persistence of the link between pubs and railway travel; there were three pubs actually on the station premises at St Pancras, and two each at King’s Cross, Euston, and London Bridge. Several Waterloo Road pubs faced the passenger as he left Waterloo station, and of the thirty-five railway stations on Booth’s map, twenty-six had pubs on or immediately outside the premises.⁴³

Chapter Four

Discussion so far on the Simonds Brewery and the brewing industry has concentrated on the economic growth vis a vis the accumulation of capital and the securing of market outlets for the product. Attention now has to be given to the factors that affected beer consumption in this period. It needs to be explained why, in the late 1870’s and 1880’s, the brewing industry was experiencing falling rates of profit, and why profits as a whole declined during various periods between 1875 and 1914.

⁴⁰ 8 *ibid*, entries for 18/4/1891, 5/3/1892, 15/7/1893, and 22/5/1897

⁴¹ GB Wilson, ‘Alcohol and the Nation’, p247

⁴² *ibid*, p249

⁴³ Brian Harrison, ‘Pubs’, in HJ Dyos & M Wolff, ‘The Victorian City, Images and Realities’, Volume 1, Routledge & Kegan Paul, London and Boston, (1973), pp162/3

From the first year of this study, 1875, beer consumption per capita was at a peak for the nineteenth century at .944 std barrels. It declined drastically in the late 1870's and early 1880's, but afterwards changed little up to 1913, except for a slight increase up to the end of the nineteenth century, and then a decline that became distorted by the build-up to the First World War.⁴⁴ "In general, the period 1870-1914 saw a rise to a peak level and then the beginning of a gradual and temporarily interrupted long-term decline."⁴⁵ This decline must be seen in the wider context of changing living standards, especially amongst the working-class, since "perhaps two-thirds to three quarters of all spending on drink came out of working-class pockets."⁴⁶

This was certainly the conclusion reached by contemporary social investigators, for example Charles Booth and Seebohm Rowntree.

It is generally accepted that real wages were rising during the late part of this century, but was not reflected by any proportional increase in working-class living standards. It was believed by contemporary commentators, and modern liberal historians like Mathias and Checkland⁴⁷ that this state of affairs was due to a disproportionate amount of wages still being spent on alcohol.

However, the selling prices of beer and alcohol in general remained fairly constant throughout this period. It is true that factor prices were increasing as well,⁴⁸ but these tended to be absorbed as much as possible by the brewing firms; such was the competitive pricing system of the brewing industry at a time when consumers did not particularly identify with any specific brand of beer. Any price increase by one firm would have led to a decrease in demand for its product in favour of another firm's, in the absence of a real degree of pricing collusion. Increases in excise duty on alcohol in 1880 when the malt duty was dropped and a rate of 6/3 per std barrel at a specific gravity of 1057 degrees was imposed.⁴⁹ The specification for gravity was decreased to 1055 degrees in 1889, after which any increases in the beer duty was either absorbed by the brewing firm, or, as was most often the case, passed on by the lowering of the specific gravity. An entry in the Simonds Minute Book for 21st April 1894 records the decision that, "The strength of our beer is to be gradually reduced so as to meet the increased duty of 6d per barrel." Any increases in spirit duty could obviously not be passed on in such a manner, and so led to increases in the selling price to the consumer. Again, mention is made for 14th July of the same year, "... to increase the price of spirits by 6d a gallon to meet the new duty except in the military trade." That Simonds could make such a concession to one particular outlet may be indicative of their experiencing better trading conditions than the brewing industry in general, because a few months later, on the 13th October the directors decided, "... to increase specific gravities of all beers to the old standard, except for our XX pale variety. " The government relied heavily on the drink trade for its major source of revenue, "with taxes

⁴⁴ See appendix IV for per capita consumption.

⁴⁵ A E Dingle, 'Drink and Working-Class Living Standards in Britain, 1870-1914', in *Economic History Review*, Vol 25, 1972 p608

⁴⁶ *ibid* p612

⁴⁷ *ibid* p608

⁴⁸ See Table II, above, for increases in final costs per std barrel for Simonds from 1873 to the early 1890's.

⁴⁹ 28th Report of the Commissioners of HM Inland Revenue, 1885, p18

on drink and licence duties combined accounting for about one-third of total government tax revenue between 1850 and 1900.⁵⁰ From a total of £32.5 millions revenue from all liquor sales and manufacture in 1875, the government revenue from the drink trade increased throughout this period to £43.2 millions by 1914, there being only one slight decline in the mid 1880's.⁵¹ Such a heavy incidence of taxation on alcohol is all the more important in relation to the stability of selling prices between 1870 and 1914.

Having established the constancy of prices Dingle attacks the claims of contemporary middle-class observers and liberal historians that the working-class was its own worst enemy re their spending habits on alcohol, since to substitute their claims it would have to be proved that either the same or a higher proportion of real wages went on alcohol at this time. Yet the evidence is clear that total UK expenditure on drink was a decreasing percentage of total consumer expenditure on goods and services during this period from a high of 15% [digit unclear] in the later 1870's declining steadily to under 9% by 1913.⁵²

Therefore, although per capita consumption was only declining slowly in the long-term after the high levels of the mid-1870's, (except for the sharp decreases in the early 1900's and in the lead-up to the First World War), beer was figuring less prominently than before in working-class expenditure. Obviously, the rise in working-class real wages had not been reflected in any proportional increase in demand for beer. There were now other factors which played an important role in diverting working-class incomes away from expenditure on alcohol, and these will be dealt with in the following chapter.

The immediate effect on the brewing industry was a decrease in the rate of revenue and falling rates of profit. The peak nineteenth century consumption figures per capita of alcohol in the mid-1870's had resulted in considerable capital expenditure by brewing firms. Not only did firms buy up tied-houses, (this had been occurring to varying degrees throughout the century), but also spent much on extending and redeveloping the breweries implementing the scientific approach to the production process with modern equipment, employing more staff, and specialising into certain types of beer, such as the new, popular 'pale' variety. Such capital outlays were necessary to meet the level of demand of the mid-1870's, as anticipated for the future, and led to the production of beer on a mass-production basis. The percentage of beer produced by the small breweries did in fact decline during this period from 20% of total UK output in 1871/5 to only 10% by the 1880's.⁵³

The heavy capital investment thus undertaken by the larger commercial firms was therefore such that its value would not be realized in the short-term. And as already indicated, the large consumption figures were very much short-lived. Firms were thus working below full capacity, and, still having the burden of recently undertaken capital

⁵⁰ A E Dingle, 'Drink and Working-Class Living Standards', p611

⁵¹ G B Wilson, 'Alcohol and the Nation', pp418/9

⁵² A E Dingle, 'Drink and Working-Class Living Standards', p611

⁵³ J E Vaizey, 'The Brewing Industry', p400

investment, began to experience falling rates of profit due to this high composition of fixed capital.

Furthermore, the early 1880's, especially the year 1881, were times of rising raw material prices. The harvest failure of hops in 1881 resulted in a massive increase from £6.50 to £18.50.⁵⁴ Hops were an integral part of the brewing process and could not be substituted by any other ingredient. It is true that apparently half of the hops used in the UK were imported from abroad at this time, but in 1882 the extra importation of hops from 138,000 cwts in 1881 to 614,000 cwts was counter-balanced by an increase in the price from £4.69 per cwt to £9.27.⁵⁵ The effect of the 1882 hop harvest failure was not disastrous for the brewing industry, but it did exacerbate the problem of falling rates of profit.

Chapter Five

If it is accepted that a decreasing proportion of real wages was being spent on beer during this period, then attention must now focus on why this was the case, and to what was the increase in real wages being diverted. Before seeking to answer this kind of question it must be borne in mind that this period of sharp decrease in per capita consumption, the late 1870's and early 1880's, were ones of the highest unemployment figures for over 70 years, at a high of 5.9%.⁵⁶ Therefore, increases in real wages must be looked at in this context, for it would be reasonable to assume from the high unemployment that it was primarily skilled and semi-skilled workers who led the field in having real increases in their wages.

One argument put forward⁵⁷ is that throughout this period the granting or renewal of licences to public houses was stringently administered by magistrates, reflecting the prevalent middle-class attitude towards drink and the working-class, and that this resulted in a reduction in the number of beer-selling premises. However, it is erroneous to conclude from this that the consumption of beer and spirits would have been proportionately affected. Despite the alarm expressed in the 'County Brewers' Gazette' for 1905 and 1909 that these reductions affected the brewing industry by closing down "trade avenues"⁵⁸, the trade did adapt itself to the changing situation.

TABLE IV⁵⁹

Year	Licence reductions for 'On' sales	For 'Off' sales
1871	112,884	12,666

⁵⁴ H S Corran, 'A History of Brewing', David & Charles, 1975, p176

⁵⁵ G B Wilson, 'Alcohol and the Nation', p337

⁵⁶ W W Rostow, 'Cycles in the British Economy: 1790-1914'. In D H Aldcroft & P Fearon, 'British Economic Fluctuations: 1790-1939', Macmillan, 1972, p88

⁵⁷ G B Wilson, 'Alcohol and the Nation', pp236/41

⁵⁸ *ibid*, p238

⁵⁹ *ibid*, pp236/41

1881	106,910	12,207
1891	105,006	11,279
1901	102,848	11,029
1911	90,586	10,490

Although there is little or no evidence that brewers were allowed to sit on the bench as Magistrates, there is evidence to suggest that they did sit on the Watch Committee, whose function it was to “have the whole control of the police whose business it is of course to look after the licensed houses.”⁶⁰ In such a position of authority, the brewers were obviously exercising discretion in favour of their own premises, since it was the police who made the recommendations whether a licence should be renewed or not. This state of affairs was often the cause of considerable concern to those who subscribed to the ideals of temperance. Ann Cook writes of the Reading between 1850 and 1872;

With brewing so well represented among the dominant families, it was perhaps inevitable that Reading should experience fears about the undue influence of brewers as did many other communities. There was particular concern ... over the question of brewers being Magistrates because of their responsibility not only for licensing public houses, but also for backing up the police in enforcing good behaviour in their vicinity.⁶¹

Then again, in 1896, a Magistrate from Henley-on-Thames expressed his anxiety over the fact that out of 14 members of the Reading Watch Committee, there were 7 who had some financial interest in licensed premises, three of whom were local brewers, one being a Simonds.⁶²

At this time of severity in granting licences, there were changes occurring in the actual nature of public houses. In Reading, for example, although the number of licensed premises continued to increase slightly from 275 in 1886 to 288 ten years later, this failed to keep pace with the increases in population and the growing urbanization of society. This is seen in Reading by the worsening of the ratio of the number of licensed premises to local population from 1/169 to 1/225 between the above two dates.⁶³ However, the number of licensed premises as ‘Off’ licences considerably increased from 37 in 1886 to 49 by 1896. This was typical of a trend in the brewing industry at the time to a movement away from consumption of alcohol on the premises to consumption off. “The change stems partly from changing class relationships and religious attitudes, and from the accompanying growth of the suburb, but also from technological developments in the drink industry, which expanded the trade in bottled beer.”⁶⁴ This expansion in the consumption of bottled beer was allied with the movement away from either brewing special bottling beer or recently brewed beer that was clarified and

⁶⁰ ‘Royal Commission on Liquor Licensing Laws’, Third Report, Minutes of Evidence, Q28, 722 1896-99

⁶¹ Ann F Cook, ‘Reading, 1835-1930: A Community Power Study’, University of Reading, unpublished PhD thesis, p95

⁶² ‘Royal Commission on Liquor Licensing Laws’, Q28, 720

⁶³ *ibid*, Vol V 1897, ‘Statistics Relating to the Number of Licensed Premises in Great Britain and Ireland’.

⁶⁴ Brian Harrison, ‘Pubs’, in H J Dyos & M Wolff (eds), p137

bottled at a high temperature, towards the cheaper, more efficient modern method of bottling chilled beer under the pressure of carbonate acid gas.⁶⁵ Simonds obviously had 'Off' licences as some of its retail outlets, for in 1871 it bought a "Farrow and Jackson carbonating beer bottling machine" to meet the demand for beer sold in this fashion.

Furthermore, despite there being an increase in the number of 'Off' licences, there were increases in the actual size of many 'On' licensed public houses and to a certain degree this tended to negate the decrease in the number of licensed premises/population ratio. Lastly, on the issue of whether licensing restrictions played a major role in decreasing the proportion of income spent on alcohol, are the growing institutions of the late nineteenth century, such as working men's clubs and music halls. As regards the former, Reading in 1897 had seven working men's clubs with membership totalling 502, out of which five were licensed to sell alcohol, these accounting for 407 of that membership. As for music halls, the beginnings of staged entertainment began in public houses. And whilst music halls were not regarded as new forms of public houses, they did provide liquor for sale on their premises. As Penny Summerfield indicates in her study of working-class culture, "Variety entertainment based in pubs ... co-existed with that based in purpose built halls specially designed for combining entertainment with eating and drinking."⁶⁶

One more type of institution developed for recreational facilities were the growth of cafes that coincided with increasing consumption of tea. This consumption had risen from 4.71lbs per capita in the decade 1870/79 to over 6.15lbs by the end of the period under study.⁶⁷ This may well have been reflected in a movement away from licensed premises by those people who primarily saw them as recreational or meeting places, but the brewing industry soon realised the gains to be made from selling tea in what became known as "improved public houses". In fact, an entry in the Simonds Minute Book for 13th July 1895 records a brand known as "Teetotal Beer" which could possibly have been developed specifically for trying to enter into this side of the drink trade.

The evidence as to the effect of licensing restrictions is, therefore, not conclusive. It is inadequate for any formulation as to the effect of these restrictions on the declining proportion of incomes spent on alcohol, and so this study must contain a dealing with other factors authors on the brewing industry have put forward.

Social attitudes were drastically changing during this period, especially amidst the controversy surrounding the relationship between poverty and intemperance. Differences of opinion on this issue had permeated all social, religious, and political associations, for it was a subject that brought in the question of class, morals, and the role of the state. It is, however, beyond the scope of this paper to study this debate in detail, but rather to look at the possible effects it had on beer consumption nationally and on the Simonds brewery.

⁶⁵ H S Corran, 'A History of Brewing', David and Charles, 1975, p235

⁶⁶ Penny Summerfield, 'The Effingham Arms and the Empire: Working-Class Culture and the Evolution of the Music Hall', paper read to the Labour History Society Conference, 1976

⁶⁷ G B Wilson, 'Alcohol and the Nation', p250

Of those groupings that believed that it was drink and drunkenness that brought about poverty the most powerfully organized and vociferous of these was the temperance movement. Temperance had been widely debated during the middle of the nineteenth century, and was an impetus for considerable legislative action. It took on renewed vigour after the high level of beer and spirits consumption in the mid-1870's, so that in 1903 the Webbs wrote in their 'History of Liquor Licensing in England', "Since about 1877 ... it may be traced in the following stringency of the licensing policy of nearly all benches of magistrates."⁶⁸ By 1881 the 25th Report of the Commissioners of HM Inland Revenue had studied the movement sufficiently to conclude that "Temperance principles seem to be influencing certain classes of the population largely, the last year having been, apparently, one of unusual progress in this direction.

However, while the temperance movement had its effect translated in legislation that was often detrimental to the brewing industry, there are many cases where its action mutually coincided with the interests the established brewing firms. For example, at a meeting of the 'Berks and Oxon County Brewers' Association' in Reading as early as 1871, the Reading Mercury reports a resolution "That this meeting, and the trade generally, are fully prepared to give their support to any well-considered means of reform, which has for its object the repression of intoxication." There were two partners from Simonds present at the meeting, of whom one was quoted as saying;

"The monopoly, which had been condemned (in the 1871 Bill) certainly did exist, but it was a monopoly of capital. The Bill was unique as a specimen of class legislation. It aimed at closing the houses frequented by mechanics and labouring men, but left untouched the rich man's club. The Government has begun at the wrong end. They should first educate the lower classes. Why were the Prussians said to be more generally temperate than our working classes? Simply because their government had given them a better education, and the sooner that was done in England, the sooner would the stupid outcry about public houses cease."

It needs to be pointed out at this stage that many subscribers to ideals of temperance came from within the working class movement. At first, with people like Hardie and Burns, there was a general acceptance of the moral viewpoint of middle class prohibitionists, although their main premise was that intemperance "was retarding the growth of working class radicalism"). Later on, in the early twentieth century attitudes began to change. It was now accepted by many that poverty was due to the failures of the economic system rather than some inherent tendency of the workingman to drink himself into his situation. To some extent the new opinion was the result of the new figures in the socialist movement like Tom Mann, who fiercely challenged the paternalistic attitude that had been so dominant in the nineteenth century.

One other development of the last few decades of the century that has been put forward as making successful demands on wages is that people were now saving a greater part of their incomes than before. Chamberlain made reference to this in his 1905 Budget speech when, discussing the continuous decline in beer consumption especially after

⁶⁸ Quoted in G B Wilson, 'Alcohol and the Nation', p255

1900, he stated that this was due to “a change in the habits of our people”.⁶⁹ There were certainly greater opportunities to save now as can be seen from the growth of Savings Banks, Co-operative Societies and Building Societies. Of the Co-operative movement Beatrice Webb wrote, “it has consistently refused to countenance the sale of alcoholic drinks in its stores, and its influence has, on the whole, been ranged on the side of temperance”. What Wilson appears to miss, however, is that for the decade 1900/09 unemployment was still high at 4.83%⁷⁰ and that it is therefore unlikely that most sections of the workforce were able to make use of these opportunities for saving. What is more probable is that beer now faced competitive luxuries like tobacco, which did not always complement it. Tobacco consumption was in fact rising sharply at this time from 26oz per head in 1891 to 33oz by 1911.⁷¹

In retrospect, however, it is evident that there is a good deal of inter-linkage between the factors put forward as responsible for the decline in beer consumption. This was a period which historians have applied a dichotomy to; those who were ‘responsible’ in the manner in which they disposed of their income, and those who weren’t so ‘responsible’. While such an analysis is exceptionally crude, it does have the advantage of demonstrating that the social changes of this period left firm expressions of principle in the expenditure budget of certain sections of the workforce.

CONCLUSION

It has not been the purpose of this paper to demonstrate how the Simonds brewery did not correspond with the national situation, but rather how it, as an individual concern, managed to respond to the difficulties facing the brewing industry at this time. It has not been a methodological operation to draw conclusions from Simonds’ economic performance as representative of the industry. It shows how in fact Simonds reacted to the changing patterns of consumption, growing social pressure from prohibitionists, the development of the large-scale firm; in fact to the total economic situation of this period. The high consumption figures of the mid 1870’s mark the beginnings of this paper’s time span, and also of the long-term decline of the brewery industry. This setback was countered by the process of amalgamations and incorporations that restructured the industry into more of a position of strength and consolidation. It was also the beginning of the end of the small breweries who could not compete against the ‘monopoly of capital’ referred to by A Simonds in 1871 that had been created by the need to operate more successfully on the basis of the advantages accruing from large-scale operations. Simonds had followed the general pattern of the medium-sized firm by expanding in size, output and distribution, whether by merger, incorporation, or whatever.

⁶⁹ *ibid*, p242

⁷⁰ W W Rostow, ‘Cycles in the British Economy’ p88

⁷¹ G B Wilson, ‘Alcohol and the Nation’, p253

The factors affecting per capita beer consumption are many and do not affect all parts of the brewing industry at the same time or in the same way. Simonds managed to accommodate itself to the temperance movement to its own advantage, when it's commonly held that this kind of political pressure had detrimental effects on brewing as an industry. It managed to emerge onto the export market at an early stage when beer exports did not figure significantly above 1.93% of total home output.

It is not surprising, therefore, bearing in mind the differences in the economic situations at various times between Simonds and the industry that after the First World War it should emerge as one of the fastest growing firms nationally, taking over a whole series of other breweries until it itself was taken over by a giant, Courages, in 1960.

Editor's Note:

A photocopy of the original typed manuscript of this document was given to the Simonds family in 2005 and re-typed for digital storage & distribution. It has not been edited from the original, but some small sections were damaged and some words have had to be guessed.

Raymond Simonds

September 2005

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Simonds family archives



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APPENDIX 1

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National Beer Output ⁷²

Year	000's Std Barrels
1885	28,608
1890	31,848
1895	32,736
1900	36,669
1905	33,854
1910	33,470
1915	29,675

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⁷² G B Wilson, 'Alcohol and the Nation', Table 14, p370

APPENDIX II

Year	National Beer Production (000's std barrels) ⁷³	Total Beer Export (000's std barrels) ⁷⁴
1882	27,847	437
1883	27,114	456
1884	28,058	437
1885	28,608	437
1886	28,648	420
1887	29,270	441
1888	29,509	448
1889	30,663	496
1890	31,848	503
1891	32,257	463
1892	32,060	452
1893	32,092	415
1894	32,229	413
1895	32,736	433
1896	34,392	463
1897	35,313	471
1898	36,185	476
1899	37,404	485
1900	36,669	511
1901	36,140	523
1902	35,853	525
1903	34,812	511
1904	33,854	518
1905	34,528	521
1906	34,438	544
1907	34,343	605
1908	33,537	551
1909	32,901	572
1910	33,479	590
1911	34,899	626
1912	34,635	670
1913	35,951	655
1914	34,750	539

⁷³ G B Wilson, 'Alcohol and the Nation', Table 14, p370

⁷⁴ Customs 9, 'Ledger of Exports from the UK:Under Articles', HM Customs & Excise

APPENDIX II (cont)

Year	Total Beer Export As a % of National Beer Production
1882	1.57
1883	1.68
1884	1.56
1885	1.53
1886	1.47
1887	1.51
1888	1.52
1889	1.62
1890	1.58
1891	1.44
1892	1.41
1893	1.29
1894	1.28
1895	1.32
1896	1.35
1897	1.33
1898	1.32
1899	1.30
1900	1.39
1901	1.45
1902	1.46
1903	1.47
1904	1.53
1905	1.51
1906	1.58
1907	1.76
1908	1.64
1909	1.74
1910	1.76
1911	1.79
1912	1.93
1913	1.82
1914	1.55

APPENDIX III

Year	Beer Export by Value (£000's)	Price per Std Barrel (shillings)
1882	1,869	85.5
1883	1,820	79.8
1884	1,642	75.1
1885	1,645	75.3
1886	1,583	76.1
1887	1,678	74.9
1888	1,705	74.5
1889	1,858	73.3
1890	1,875	73.1
1891	1,695	72.8
1892	1,651	70.9
1893	1,509	70.4
1894	1,463	68.8
1895	1,524	68.9
1896	1,592	68.1
1897	1,621	68.6
1898	1,623	68.9
1899	1,664	68.2
1900	1,761	68.2
1901	1,783	68.0
1902	1,786	68.5
1903	1,750	66.7
1904	1,728	66.1
1905	1,722	66.7
1906	1,866	62.4
1907	1,886	61.6
1908	1,698	60.9
1909	1,742	60.7
1910	1,793	62.5
1911	1,954	64.4
1912	2,158	65.1
1913	2,135	65.6
1914	1,769	65.0

APPENDIX IV

Population Increase and Beer Consumption ⁷⁵

Year	Population	Per Capita Consumption (Std Barrels)
1888	37,454,000	0.744
1889	37,460,000	0.803
1890	37,464,000	0.834
1891	37,803,000	0.837
1892	38,109,000	0.826
1893	38,430,000	0.822
1894	38,779,000	0.818
1895	38,899,000	0.806
1896	39,265,000	0.840
1897	39,644,000	0.846
1898	40,029,000	0.875
1899	40,416,000	0.886
1900	40,799,000	0.897
1901	41,164,000	0.874
1902	41,544,000	0.852
1903	41,961,000	0.843
1904	42,371,000	0.820
1905	42,790,000	0.790
1906	43,221,000	0.775
1907	43,661,000	0.773
1908	44,099,000	0.767
1909	44,539,000	0.735

Source: '32nd Report of the Commissioners of HM Inland Revenue', 1888-1894
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⁷⁵ G B Wilson 'Alcohol and the Nation', p373

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