

Glossary

1989 Report	<i>The Supply of Beer: a report on the supply of beer for retail sale in the United Kingdom</i> (Cm 651, March 1989); a report by the MMC .
AB	Allied Breweries Ltd; became Allied-Lyons PLC in 1981 and later, following acquisition of Pedro Domecq in 1994, changed name to Allied Domecq PLC.
Above-the-line	Used, in this report, of marketing expenditure: mainly spending on media advertising, sponsorship, agency fees, packaging development and public relations. It is generally directed at building brand awareness and image. (To be distinguished from below-the-line expenditure: principally expenditure on trade promotions, new product development and market information.)
ABV	Alcohol by volume: the percentage by volume of alcohol in beer .
AD	Allied Domecq PLC; until August 1996 50:50 partner with Carlsberg in CT .
ADR	Allied Domecq Retailing Ltd, a subsidiary of AD with responsibility for, among other things, AD's retail estate.
Ale	Originally an unhopped fermented malt drink; now any beer , especially bitter , produced by fermentation at temperatures of around 18 to 21°C (65 to 70°F); used in this report to refer collectively to bitter and stout .
Allied/Carlsberg report	<i>Allied-Lyons PLC and Carlsberg A/S: a report on the proposed joint venture</i> (Cm 2029, July 1992); a report by the MMC .
Allied-Lyons	Allied-Lyons PLC-see AB .
Barrel	A measure of volume, or a cask containing 1.63659 hectolitres (163.659 litres), or 36 gallons (288 pints). The barrel is a measure still commonly used in the UK beer industry.
Bass	Bass PLC , a national brewer .
Bass Group	Bass PLC and its subsidiaries.
Bass PLC	Parent company of the Bass Group .
Bass Taverns	Managed houses division of Bass PLC .
BBL	Bass Brewers Limited , the Brewing division of Bass PLC which will become a subsidiary of BCT on completion of the merger.
BCT	Bass/Carlsberg-Tetley, the term used in the report to refer to the company carrying on the combined business of CT and BBL .
Beer	A fermented beverage brewed with hops ; the generic term covering ale , lager and stout .
Beer Orders	The Supply of Beer (Loan Ties, Licensed Premises and Wholesale Prices) Order 1989 (the Loan Ties Order); and the Supply of Beer (Tied Estate) Order 1989 (the Tied Estate Order). See Appendix 3.1 for a summary of the Orders' provisions.

Bitter	Pale or amber ale , usually well hopped for a bitter flavour.
BLRA	Brewers and Licensed Retailers Association (formerly known as the Brewer's Society).
Bottom fermentation	Traditionally, the method of fermentation to produce lager . During fermentation , the yeast sinks to the bottom of the fermenting vessel.
BTL	Bass Taverns Limited, a subsidiary of Bass PLC .
BWTE	Brewer without a tied estate. The most significant BWTEs are CT and Guinness .
Carlsberg	Carlsberg A/S, the parent company of the Carlsberg Group, owner of the Carlsberg and Tuborg Brands.
Carlsberg-Tetley PLC	Brewing company previously owned 50:50 by AD and Carlsberg , now owned 50:50 by Bass and Carlsberg .
Cask	Term usually used for the container in which beer continues to ferment until served.
Conditioning	Maturation of beer after it leaves the fermenter. Brewery conditioned: beer conditioned in the brewery prior to filtration, instead of conditioning in cask or bottle. Cask conditioned: beer which undergoes fermentation in the cask from which it is served instead of in conditioning tanks at the brewery.
Conversion factors	1 hectolitre (hl)= 100 litres = 175.98 pints = 21.9969 gallons = 0.611026 barrels . 1 barrel = 288 pints = 36 gallons = 1.63659 hl.
CT	See Carlsberg-Tetley PLC .
CTBL	Carlsberg-Tetley Brewing Limited, a subsidiary of CT .
DGFT	Director General of Fair Trading.
Draught	Term describing beer which is drawn through a tap or a pump (to the bar), to distinguish it from bottled or canned beer products.
Elders/Grand Metropolitan report	<i>Elders IXL Ltd and Grand Metropolitan PLC: a report on the merger situations</i> (Cm 1227, October 1990); a report by the MMC .
Excise duty	A tax on beer ; the level being proportionate to the ABV .
FAB	Flavoured alcoholic beverage (including 'alcopop'); a drink in which alcohol produced by fermentation (including wine, beer or cider), or by distillation, is added to a carbonated, or still, flavoured base.
Factoring	The selling, by a brewer, of a beer brand which it does not own or produce under licence or import under licence.
Fermentation	The process in which yeast converts wort into beer .
Final sales	Used of market shares; the point of final sale is the point at which beer is sold by a brewer to a non-brewer, ie excluding inter-brewer transactions.
FTA	Fair Trading Act 1973.
Gallon	4.546 litres or 8 pints .

Guest beer provision	A provision of one of the Beer Orders under which a tied customer, lessee or tenant, must be free to purchase at least one brand of cask-conditioned beer from a supplier other than the brewer to which its custom is tied.
Guinness	Guinness PLC, parent company of Guinness Brewing Worldwide Ltd, a large brewer with no wholesale or retail interests; and the brand name of Guinness stout .
Head	Froth which appears at the top of the glass when beer is served.
Hectolitre (hl)	100 litres (21.9969 gallons , 0.611026 barrels); the metric unit of volume used throughout this report.
HHI	Herfindahl-Hirschmann Index. A measure of industrial concentration derived from the sum of the squares of the individual percentage market shares of each firm in the same market.
hl	Hectolitre(s) .
Hop	A perennial climbing plant: its 'cones' or flowers give beer a bitter flavour and aroma.
Keg	Sealed container usually for inert chilled and filtered beers whose maturation has been completed.
Lager	A straw-coloured fermented malt drink made from lightly kilned malts and fermented at 7 to 13°C(45 to 55°F).
Litre	1.76 pints = 0.22 gallons .
Loan tie	An arrangement under which a brewer makes a loan to a pub in exchange for which the pub agrees to take some or all of its beer supplies from the brewer.
Malt	Barley which has been steeped in water, allowed to germinate and then heated in a kiln to halt germination.
Micro-brewery	A very small brewery, usually operating within a single pub, producing limited quantities of beer for that pub.
MMC	Monopolies and Mergers Commission.
National accounts	Customers of a brewer which place orders or negotiate contracts at a national, as opposed to local, level.
National brewer	In this report, a brewer with a large national brewing business, with its own wholesaling and distribution, and with a tied estate . (Bass , Whitbread and S&N .)
Net selling price	Actual price paid by the retailer to the wholesaler.
Nitrokeg	Brewery conditioned pasteurized beers which are served under a mixture of carbon dioxide and nitrogen, usually chilled.
OFT	Office of Fair Trading.
Pint	0.568 litres = one-eighth of a gallon .
Pub chain/pub	A company, other than a brewer, owning or controlling a number of

company	pubs.
Regional brewer	A brewer, other than a national brewer or a major BWTE , mainly, but not necessarily, concentrated in a particular region of the UK.
Scottish Courage	beer division of Scottish & Newcastle plc .
S&N	Scottish & Newcastle plc (parent company of Scottish Courage), a national brewer .
Secondary fermentation	Process in which beer continues to ferment and mature slowly in cask or bottle.
Shareholders' Deed	Deed on agreed terms between Bass Holdings Limited; Bass Brewers 1996 Limited; Bass PLC ; Carlsberg A/S ; CT and CTBL setting out the terms of the arrangement between the companies relating to the operation of BCT .
Stout	Brewed as an ale and is dark in colour due to the addition of dark malt . It is dispensed with a higher level of nitrogen gas and a lower level of carbon dioxide to give a light creamy head .
Tied estate	Used of licensed premises within the meaning of the Tied Estate Order (see Beer Orders), that is: <p style="margin-left: 40px;">(a) in England and Wales, premises for which a justices' on-licence (within the meaning of the Licensing Act 1964), other than a Part IV licence (within the meaning of that Act), is in force, or in respect of which a club is registered within the meaning of that Act;</p> <p style="margin-left: 40px;">(b) In Scotland, premises in respect of which a public house licence, a hotel licence or a refreshment licence (within the meaning of the Licensing (Scotland) Act 1976) is in force or which are occupied by a registered club within the meaning of that Act;</p> <p style="margin-left: 40px;">(c) In Northern Ireland, premises in which the sale of intoxicating liquor is authorised by a licence granted under the Licensing Act (Northern Ireland) 1971, being premises of a kind mentioned in paragraph (a) or (f) of section 3(1) of that Act, or in respect of which a club is registered within the meaning of the Registration of Clubs (Northern Ireland) Order 1987;</p> <p>owned and managed by a brewer, or leased by a brewer to a tenant. Normally these pubs purchase all or part of their beer requirements from the owning brewer.</p>
Top fermentation	Traditional method of fermenting wort to produce ale , in which yeast rises to the top of the ale during the process.
Whitbread	Whitbread PLC, a national brewer .
Widget	A canister of nitrogen gas, contained in some canned beers , which gives the beer when poured a head comparable in nature to that of draught ales .
Wort	Unfermented beer .
Yeast	The agent which turns sweet malty wort (unfermented beer) into an alcoholic drink. Yeast is a single cell fungus.