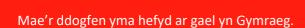




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# Appendices Final Report Review of the introduction of Minimum Pricing for Alcohol in Wales



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Appendices: Livingston, Perkins, Holloway, Murray, Buhociu and Madoc Jones (2025). Final Report - Review of the introduction of Minimum Pricing for Alcohol in Wales. Cardiff: Welsh Government, GSR report number 80/2024. Available at: https://www.gov.wales/review-introduction-minimum-pricing-alcohol-wales-contribution-analysis

Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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## **Appendices**

- 1. Summary of Welsh evaluations
- 2. Alcohol Change data
- 3. 2022-24 policy-based literature

## **Appendix 1 – Summary of Welsh evaluations**

Study	Lead Agency/Principal Investigator	Partners	Principal Investigator	Reports
Switching Study	University of South Wales.	Figure 8 Consultancy Wrexham University	Professor Katy Holloway	Switching Study FINAL
Contribution Analysis	Wrexham University.	Figure 8 Consultancy University of South Wales.	Professor Wulf Livingston	Contribution Analysis- INTERIM
Retailers Study	National Centre for Social Research	University of Sheffield	Dr Martin Mitchell	Retailers - BASELINE Retailers - INTERIM
Treatment Population Study	Figure 8 Consultancy	Wrexham University. University of South Wales	Mr Andrew Perkins	Treatment Population - INTERIM
General Population Study	University of South Wales	Figure 8 Consultancy Wrexham University	Professor Katy Holloway.	General Population - BASELINE General Population - COVID General Population - INTERIM
Public Attitudes Study	Welsh Government	None	Dr Tom Cartwright	Public Attitudes - FINAL

### Appendix 2 – Alcohol Change UK Data

### 2.1 Comparison of the impact of a minimum unit price (MUP) of 50p per unit MUP in 2009, 2014 and 2024

The following tables compare the impact of a 50p per unit minimum unit price (MUP) on the prices of four specific drinks from the same supermarket chain in 2009, 2014 and 2024. The initial price check was carried out as part of the research for the 2009 Alcohol Concern (now Alcohol Change UK) report *The Price is Right*. The 2009 and 2014 prices were for England and Wales. The prices for 2024 are those for England, to eliminate the confounding factor of MUP in Wales from 2020 onwards.

#### 2009 Prices

Drink	Units	Price	Price per unit	Price @ 50p per unit	£ difference between 50p MUP and 2009 price	% difference between 50p MUP and 2009 price
Sainsbury's Basics Wine 75cl	8.3	£2.49	£0.30	£4.15	£1.66	+67%
Stella Artois 440ml	2.2	£0.92	£0.41	£1.10	£0.18	+20%
Sainsbury's Basics Cider 2 litres	8.4	£1.18	£0.14	£4.20	£3.02	+256%
Sainsbury's Basics Vodka 70cl	28	£6.41	£0.23	£14.00	£7.59	+118%

## 2014 Prices

Drink	Units	Price	Price per unit	Price @ 50p per unit	£ difference between 50p MUP and 2014 price	% difference between 50p MUP and 2014 price
Sainsbury's Basics Wine 75cl	7.9	£3.60	£0.46	£3.95	£0.35	+10%
Stella Artois 440ml	2.1	£1.00	£0.48	£1.05	£0.05	+5%
Sainsbury's Basics Cider 2 litres	8.4	£2.15	£0.26	£4.20	£2.05	+95%
Sainsbury's Basics Vodka 70cl	26.3	£10.50	£0.40	£13.15	£2.65	+25%

## 2024 Prices

Drink	Units	Price	Price per unit	Price @ 50p per unit	£ difference between 50p MUP and 2015 price	% difference between 50p MUP and 2024 price
Sainsbury's Basics Wine, rebranded as Sainsbury's House Wine, 75cl	9.0	£4.50	£0.50	£4.50	£0.00	0%
Stella Artois 440ml	2.0	£1.29	£0.64	£1.00	-£0.29	-32%
Sainsbury's Basics Cider, rebranded as Sainsbury's Original Dry Cider, 2 litres	9.0	£2.85	£0.32	£4.50	£1.65	+37%
Sainsbury's Basics Vodka, rebranded as Sainsbury's Vodka 70cl	26.3	£11.99	£0.46	£13.15	£1.16	+9%

#### 2.2 Survey of the prices of the cheapest drinks on sale in shops in Wales

This snapshot survey was carried out by Alcohol Change UK in March 2024, four years after the introduction of minimum unit pricing (MUP) for alcohol in Wales. It focusses on the cheapest drinks on sale in Wales, in terms of their price relative to their alcohol content. The fieldwork was carried out in branches of Lidl, Morrison's, Sainsbury's, Tesco, and Spar in Cardiff on 6 and 7 March 2024. All prices per unit have been rounded up or down to the nearest whole penny. In each section, drinks are listed in alphabetical order. In order to highlight recent and longer-term trends, this report compares prices in November 2019 (four months before the introduction of MUP) with those in March 2023 and March 2024.

#### Cider

By far the biggest impact of MUP continues to be in the cider category, and particularly on strong (7.5% ABV) "white ciders", which were sold for as little as 21p per unit in 2019. As early as March 2020, large (2.5 or 3 litre) containers of these ciders were becoming harder to find, being largely unsaleable at 50p per unit. This trend has continued, and in March 2024, we did not find any 7.5% ABV ciders, even in smaller bottles or cans. In their place, we've seen a variety of 4% and 5% ABV ciders in 2-litre bottles and in smaller cans and bottles ranging in size from 440ml to 568ml (one pint). It is fair to say that MUP at 50p per unit is an effective measure for reducing the sale (and presumably, therefore, the consumption) of superstrength ciders.

Drink name, ABV, size	Seller(s)	Alcohol units per container	2019 price	2019 price per unit	2023 price	2023 price per unit	2024 price	2024 price per unit
ACE Cider 7.5% 1 litre bottle	Spar	7.5	Not found on sale	Not found on sale	£3.75	£0.50	Not found on sale	Not found on sale
Black Storm 7.5% single 500ml can	Spar	3.8 per can	£0.99	£0.26	Not found on sale	Not found on sale	Not found on sale	Not found on sale
Country Choice 5% 2 litre bottle	Spar	10	Not found on sale	Not found on sale	£5.00	£0.50	£5.00	£0.50

Country Choice 5% 440ml can	Spar	2.2	Not found on sale	Not found on sale	Not found on sale	Not found on sale	£1.69	£0.77
Country Choice 5% 500ml can	Spar	2.5	Not found on sale	Not found on sale	Not found on sale	Not found on sale	£1.50	£0.60
Crofters 5% 2 litre bottle	Tesco	10	£2.05	£0.21	£5.00	£0.50	£5.00	£0.50
Crumpton Oaks 5% 2.5 litre bottle	Spar	12.5	£4.49	£0.36	Not found on sale			
Crumpton Oaks 5% 2 litre bottle	Morrison's and Tesco	10	£2.05	£0.21	£5.00	£0.50	Not found on sale	Not found on sale
Crumpton Oaks 5% 500ml bottles and cans (increased to 568ml in 2024)	Tesco	2.5 (increased to 2.8 in 2024)	£0.85	£0.34	£1.25	£0.50	£1.43	£0.51
Frosty Jack's 7.5% 2.5 litre bottle	Spar	18.8	£4.79	£0.25	Not found on sale			
Frosty Jack's 7.5%	Spar	3.8	Not found on sale	Not found on sale	£2.00	£0.53	Not found on sale	Not found on sale

single 500ml can								
HCC Black 7.5% 500ml can	Spar	3.8 per can	Not found on sale	Not found on sale	£2.00	£0.53	Not found on sale	Not found on sale
K Cider 8% single 500ml can	Spar	4.0 per can	£1.50	£0.38	Not found on sale	Not found on sale	Not found on sale	Not found on sale
K Cider 8% 4 x 440ml cans	Morrison's	3.5 per can	£6.00 for 4 cans	£0.43	Not found on sale	Not found on sale	Not found on sale	Not found on sale
Knights Cider 7.5% 500ml can	Spar	4.2 per can	Not found on sale	Not found on sale	£2.10	£0.50	Not found on sale	Not found on sale
Original Dry Cider 5% 2 litre bottle	Sainsbury's	10	£2.50	£0.25	£5.00	£0.50	Not found on sale	Not found on sale
Original Dry Cider 5% 4 x 440ml cans	Sainsbury's	2.2 per can	Not found on sale	Not found on sale	£4.50	£0.50	Not found on sale	Not found on sale
Tesco Apple Cider 5% 4 x 440ml cans	Tesco	2.2 per can	£2.20 for 4 cans	£0.25	£4.40 for 4 cans	£0.50	£4.40 for 4 cans	£0.50

White Storm 7.5% single 500ml can	Spar	3.8 per can	£0.99	£0.26	Not found on sale			
White Storm 7.5% 2.5 litres	Spar	18.8	£3.99	£0.21	Not found on sale			
Woodgate Apple Cider 4.5% (down from 5% in 2019 and 2020) 4 x 440ml cans	Lidl	2 per can (2.2 in 2019 and 2020)	£1.89 for 4 cans	£0.21	£3.96	£0.50	£3.96	£0.50
Woodgate Apple Cider 4.5% (down from 5% in 2019 and 2020) 2 litre bottle	Lidl	9 (10 in 2019 and 2020)	£1.99	£0.20	£4.50	£0.50	£4.50	£0.50

## **Boxed perry**

Before MUP, boxed perries offered a cheap alternative to wine boxes. They briefly disappeared from some shops in Wales when MUP was introduced in 2020. We found them on sale again in 2023, but by 2024 MUP seems to have led to a fairly substantial reduction in container size for the most widely sold brand, presumably in order to maintain affordability.

Drink	Seller(s)	Alcohol	2019 price	2019 price	2023 price	2023 price	2024 price	2024 price
name,		units per		per unit		per unit		per unit
ABV, size		container						
Country	Morrison's,	20.4	£4.75 in	£0.23 in	£10.20 in	£0.50 in	£7.65 in	£0.50 in
Manor	Sainsbury's,	(15.3 in	Morrison's,	Morrison's,	Tesco and	Tesco and	Morrison's	Morrison's
6.8%	Tesco	2024)	£5.75 in	£0.28 in	Sainsbury's,	Sainsbury's,	and Tesco,	and Tesco,
3 litre box			Tesco	Tesco	£11.25 in	£0.53 in	£8.50 in	£0.56 in
(2.25 litres					Morrison's	Morrison's	Sainsbury's	Sainsbury's
in 2024)								

#### **Spirits**

After ciders, spirits are the drinks category where the impact of MUP is clearest. The introduction of MUP in 2020 more or less eliminated the cheapest category of spirits: supermarkets' "savers" and "basics" brands, which we had found on sale in 2019 for as little as 38p per unit. "Savers" and "basics" spirits were replaced at the bottom of the price scale by what had been the supermarkets' next cheapest own-brand spirits. Most of these own-brand spirits then sat squarely on the 50p per unit threshold from 2020 to 2023, but some have now started to creep slightly higher. This is probably due to general inflationary pressures and could be taken as an argument for raising the MUP threshold higher than 50p.

Comparisons over time are hard to make in this category, since in 2019 we recorded the prices of the then cheapest types of spirits, which are no longer on sale in Wales. We did not record at that point the prices of what are now the cheapest types, but which were only the second cheapest in 2019.

Drink name, ABV, size	Seller(s)	Alcohol units per container	2019 price	2019 price per unit	2023 price	2023 price per unit	2024 price	2024 price per unit
Glenn's Vodka 37.5% 700ml bottle	Tesco	26.3	Not recorded	Not recorded	£13.13	£0.50	£14.25	£0.54
Glenn's Vodka 37.5% 1 litre bottle	Morrison's	37.5	Not recorded	Not recorded	£18.75	£0.50	£18.75	£0.50
Own brand spirits: vodka and gin 37.5% 350ml bottle	Lidl, Morrison's, Sainsbury's, Tesco	13.1	Not recorded	Not recorded	£6.57 to £6.59 in Morrison's, £6.60 in Sainsbury's, £6.75 in Lidl, not found in Tesco	£0.50 in Morrison's and Sainsbury's, £0.52 in Lidl	£6.80 in Morrison's, Sainsbury's and Tesco, £6.79 in Lidl	£0.52

Own brand spirits: vodka and gin 37.5% 500ml bottle	Morrison's and Sainsbury's	18.8	Not recorded	Not recorded	£9.38 in Sainsbury's, £9.50 in Morrison's	£0.50 in Sainsbury's, £0.51 in Morrison's	£9.38 in Sainsbury's, £10.50 in Morrison's,	£0.50 in Sainsbury's, £0.56 in Morrison's
Own brand spirits: vodka and gin 37.5% 700ml bottle	Lidl, Sainsbury's and Tesco	26.3	Not recorded	Not recorded	£13.13	£0.50	£13.13 in Lidl and Sainsbury's £13.15 in Tesco	£0.50 in all shops
Own brand spirits: vodka and gin 37.5% 1 litre bottle	Lidl, Sainsbury's and Tesco	37.5	Not recorded	Not recorded	£18.75 in Lidl, £18.80 in Sainsbury's and Tesco	£0.50 in all shops	£18.75 in Lidl and Tesco, not found in Sainsbury's	£0.50
Own brand gin 37.5% 1.5 litre bottle	Sainsbury's	56.3 units	Not recorded	Not recorded	£28.13	£0.50	Not found on sale	Not found on sale

## Fortified wines

Like spirits, a number of the cheapest drinks in this category sat on the 50p per unit threshold from 2020 to 2023. By 2024, the prices of one or two had started to rise slightly above this threshold, again probably as a result of general price inflation.

Drink name, ABV, size	Seller(s)	Alcohol units per container	2019 price	2019 price per unit	2023 price	2023 price per unit	2024 price	2024 price per unit
Cream Fortified British Wine 15% 1 litre bottle	Tesco	15	£5.50	£0.37	£7.50	£0.50	£7.50	£0.50
Fortified British Wine 14.5% 1 litre bottle	Sainsbury's	14.5	Not found on sale	Not found on sale	Not found on sale	Not found on sale	£7.50	£0.52
Manor Hall 15% 1 litre bottle	Morrison's	15	£5.50	£0.37	£7.50	£0.50	£7.75	£0.52
Nobleman 15% 700ml bottle (1 litre in 20240	Lidl	10.5 (15 in 2024)	£3.15	£0.30	Not found on sale	Not found on sale	£7.50	£0.50
Old Westminster 13% 700ml bottle	Morrison's and Tesco	9.1	£3.50 in Morrisons, £3.60 in Tesco	£0.38 in Morrisons, £0.40 in Tesco	£4.55 in Morrison's, not found in Tesco	£0.50 in Morrison's, not found in Tesco	£4.75 in Morrison's, not found in Tesco	£0.52 in Morrison's, not found in Tesco
Own brand sherry 17.5% 750ml bottle	Sainsbury's	13.1	Not found on sale	Not found on sale	£6.57	£0.50	Not found on sale	Not found on sale

Tio Nico	Lidl	12.8	Not found on	Not found on	£6.39	£0.50	£6.39	£0.50
Cream Sherry			sale	sale				
17%								
750ml bottle								

#### Beer

We have generally only found a small number of beers on or around the 50p per unit threshold, and these have tended to be either particularly weak (2%) or particularly strong (up to 8.5%). One interesting point to note in the table below is that Lidl now appear to be selling their cheapest lager at two different strengths and volumes, apparently in order to be able to keep it on the 50p per unit threshold.

Drink name, ABV, size	Seller(s)	Alcohol units per container	2019 price	2019 price per unit	2023 price	2023 price per unit	2024 price	2024 price per unit
Depot No. 90 Lager and Bitter 2% 4 x 440ml cans	Sainsbury's	0.9 per can	£1.10 for 4 cans	£0.31	£1.85	£0.51	£1.85	£0.51
Excelsior Lager 4% 4 x 440ml cans (500ml in 2024)	Lidl	1.8 per can (2 in 2024)	£2.45 for 4 cans	£0.34	£3.52 for 4 cans	£0.50	£4.00 for 4 cans	£0.50
Excelsior Lager 3.4% 4 x 500ml cans	Lidl	1.7 per can	Not found on sale	Not found on sale	Not found on sale	Not found on sale	£3.40 for 4 cans	£0.50
Savers Lager and Bitter 2% 4 x 440ml cans	Morrison's	0.9 per can	£1.10 for 4 cans	£0.31	£1.76 for 4 cans	£0.50	Not found on sale	Not found on sale
Lynx Super 7.5% single 500ml can	Spar	3.75 per can	Not found on sale	Not found on sale	£1.99	£0.53	£2.25	£0.60

Oranjeboom	Spar	4.3 per can	Not found	Not found	£2.15	£0.50	£2.19	£0.51
8.5%			on sale	on sale				
single 500ml								
can								

#### Wines

As in our previous surveys, single bottles of wine at or near the 50p per unit threshold were only found on sale in discount supermarkets. MUP has had an impact on wine prices in other shops, but only in the case of multiple-purchase discounts (e.g. 25% off when buying 6 or 12 bottles).

Drink name, ABV, size	Seller(s)	Alcohol units per	2019 price	2019 price per unit	2023 price	2023 price per unit	2024 price	2024 price per unit
		container	00.00	00.40				<b>.</b>
Italian	Lidl	8.6	£3.69	£0.43	Not found	Not found	Not found on	Not found on
Chardonnay 750ml					on sale	on sale	sale	sale
Australian Chardonnay 12.5%	Lidl	9.4	£3.89	£0.41	Not found on sale	Not found on sale	£4.79	£0.51
750ml bottle								
South African	Lidl	9.8	£3.99	£0.41	Not found	Not found	Not found on	Not found on
Chenin Blanc 13.5%					on sale	on sale	sale	sale
750ml bottle								
Conde Noble 11% (10% in 2024) 750ml bottle	Lidl	8.3 (7.5 in 2024)	Not found on sale	Not found on sale	£4.13	£0.50	£3.75	£0.50
Vineyard Sauvignon Blanc and Chardonnay 12% (11% for Sauvignon Blanc in 2024) 750ml bottle	Lidl	9 (8.3 for Sauvignon Blanc in 2024)	Not found on sale	Not found on sale	£4.50	£0.50	£4.50 for Sauvignon Blanc, £4.59 for Chardonnay	£0.54 for Sauvignon Blanc, £0.51 for Chardonnay

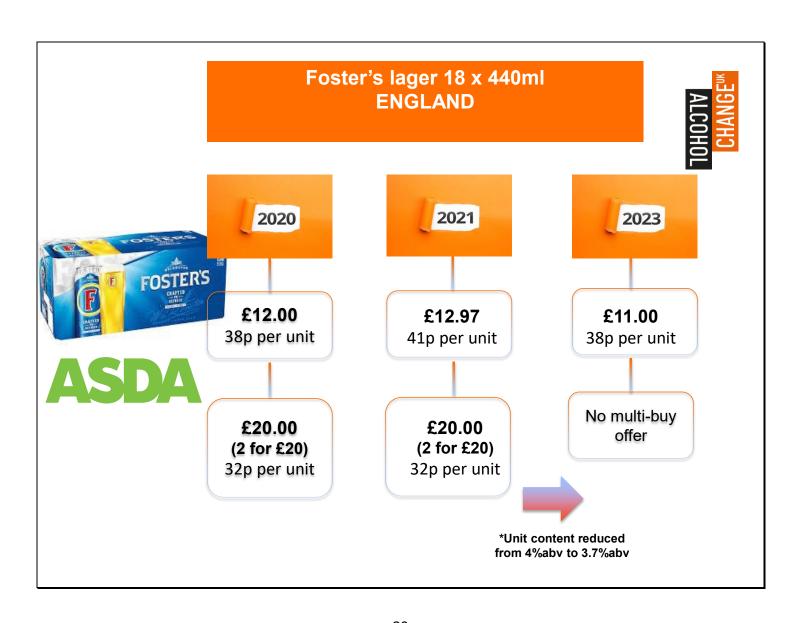
2.3 Alcohol supermarket prices in England and Wales Dec 2020-2023

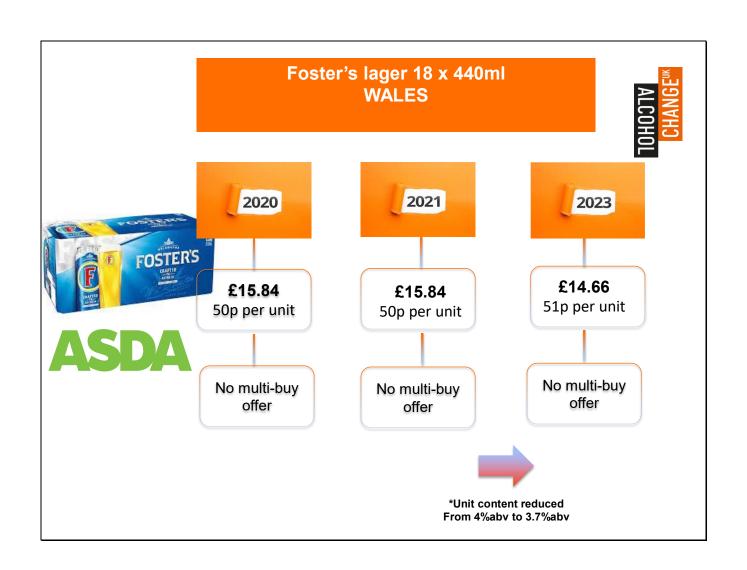




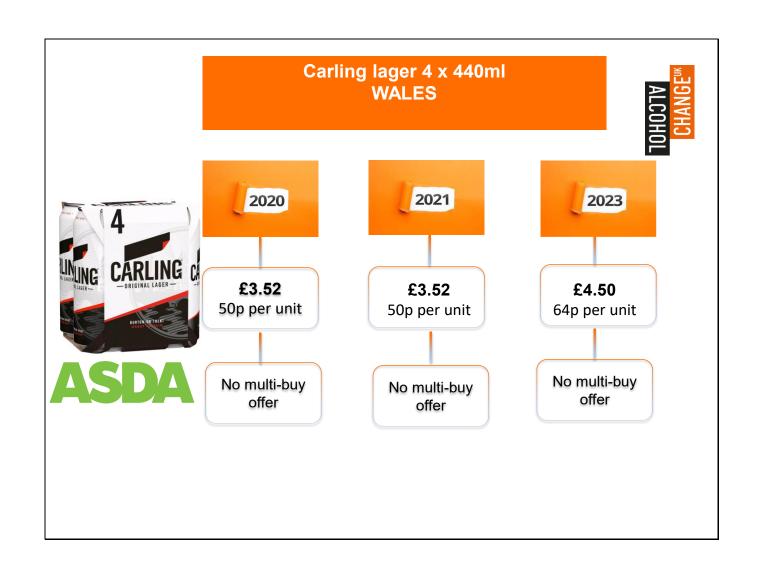
































## **Key takeaways**



- MUP is an effective intervention in raising the prices of cheap alcoholic products
- The differences in prices between England and Wales have been eroded
- Multi-buy deals in Wales are back!



## **Appendix 3 - 2024-22 Policy Based Literature**

(Presented in chronological order – most recent first)

Authors*	Date	Note	Link
Alcorn, T.	2024	Article outlines the challenges facing governments wanting	Alcorn 2024, The New York Times
		to place health (cancer) labelling on alcohol products	
Anderson, P., Stockwell, T.,	2024	Examines the question why minimum pricing is not more	Anderson 2024, The BMJ
Natera, G., et al		widely adopted	
Bokhari, F.A.S., Chakraborty, R.,	2024	Explores the effectives of price controls in a pandemic –	Bokhari 2024, Wiley Online Library
Dobson, P.W., et al		suggests they have a sobering effect	
Fitzgerald, N., O'Donnell, R., Uny,	2024	Explores four different policy approaches to alcohol related	Fitzgerald 2024, ScienceDirect
I., et al		harms – concludes pricing as a 'sweetspot'	
Manthey, J., Gobina, I., Isajeva. L.,	2024	Insights from comparing five European countries	Manthey 2024, Springer Nature Link
et al		experiences of raising alcohol taxes – concludes increases	
		in taxes results in reduced consumption	
Mantzari, E., Ventsel, M., Pechey,	2024	Highlights positive impact on reduction of volume of	Mantzari 2024, PLOS Medicine
E., et al		alcohol sold by reducing glass size	
Marzan, M.B., Callinan, S.,	2024	Modelling of four different pricing policies for Australia.	Marzan 2024, ScienceDirect
Livingston, M., et al		Concludes they would lead to reduction in consumption	
		and relieve burden of alcohol related harms	
World Health Organization	2024	Highlights a range of industry influences on behaviours	WHO 2024
		such as – alcohol food, pharmaceuticals and tobacco	
Angus, C.	2023	Modelling for pricing and promotion restrictions for	Angus 2023, health-ni.gov.uk
		Northern Ireland	
Alcohol Focus	2023	Briefing with evidence links calling for a response to rising	Alcohol Focus 2023 (pdf only)
		alcohol related death numbers	
Barry, J and Lyne, J.	2023	Highlights the complexities and challenges of the	Barry 2023, Cambridge University
		introduction of a public health policy in Ireland	<u>Press</u>
Behúnová, A., Seňová, A., and	2023	Review of literature looking at excise duty and alcohol	Behunova 2024, Addictology
Bednárová, I.		consumption across European countries. Concludes	Journal (pdf only)

		excise duty does more to raise prices, income for	
		governments than it does overall consumption	
Broadbent, P., Thomson, R.,	2023	Article exploring the public health implications of the cost	Broadbent 2023, The Lancet
Kopasker, D., et al		of-living crisis: outlining mechanisms and modelling consequences	Regional Health
Bhattacharya, A.	2023	Brief response examining the 'messiness' of evidence	Bhattacharya 2023a, Wiley Online
		based policy evaluation with regard to MUP	Library
Bhattacharya, A.	2023	Briefing paper reviewing range of policies for alcohol,	Bhattacharya 2023b, Social Market
		gambling, tobacco etc. Concludes most impactful involve	<u>Foundation</u>
		raising prices or restricting availability	
Chambers, T., Mizdrak, A.,	2023	Modelling in New Zealand of impact of four different	Chambers 2023, Wiley Online
Herbert, S., et al		alcohol policy measures. Concludes comprehensive	Library
		alcohol policy measures improve quality of life measures	
Holmes, J.	2023	Analysis of MUP in Scotland. Concludes it has led to	Holmes 2023, Wiley Online Library
		reduced consumption, including among heavier drinkers.	
		Highlights the uncertainty regarding its impact on those at	
		greatest risk	
Pettigrew, S., Booth, L. and Pinho-	2023	International research showing a receptiveness greater	Pettigrew 2023, ScienceDirect
Gomes, A-C.		governmental intervention in alcohol control policies	
Robinson, M., Callinan, S., and	2023	Commentary on the 'messiness' natural experiments to	Robinson 2023, Wiley Online
Taylor, N.		evaluate public policy	<u>Library</u>
Taylor, N., Callinan, S., and	2023	Suggests learning from Scotland Australia means MUP	Taylor 2023, Wiley Online Library
Robinson, M.		should be indexed for inflation	
Nicholls, J. and Cairney, P.	2022	In depth article exploring the use of policy theories to	Nicholls 2022a,
		interpret public health case studies: the example of a	paulcairney.wordpress.com
		minimum unit price for alcohol	
Nicholls, J., O'Donnell, R., Mahon,	2022	Research establishing stakeholder perspectives showing	Nicholls 2022b, ScienceDirect
L., et al		strong support for the adoption of a public health licensing objective	

<sup>\*</sup>First three authors listed only and then more than three followed with et al.