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MINISTRY OF AGRICULTURE AND FISHERIES

Report of the
ORGANISATION COMMISSION
FOR
FAT STOCK
FOR ENGLAND AND WALES

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LONDON

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TABLE OF CONTENTS.

Minute of Appointment	PAGE 6
------------------------------	------------------

PART I.—INTRODUCTORY.

Paragraph.

1. Terms of Reference	7
2. Desirability of a Great Britain Scheme	8
3. Scope of recommendations	8
4. Interests consulted	8

PART II.—SUPPLY REGULATION.

A. Volume and Seasonality of Supplies 1927-31.

5. General	9
6. Volume of supplies	9
7. Seasonality of supplies of butchers' meat	11
8. Seasonality of home-killed beef supplies	12
9. Seasonality of marketings and killings of home-fed cattle in England and Wales	13
10. Supplies and prices of beef in the autumn	14
11. Seasonality of marketings and killings of sheep and lambs in England and Wales	14
12. Supplies and prices of mutton and lamb in the autumn	15
13. Seasonality of home-killed pork supplies	17
14. Special problem of the autumn glut	17

B. The Regulation of Meat Imports, 1932-34.

15. Introductory	18
16. The Ottawa Agreements	19
17. Emergency action in 1932	20
18. The Argentine Convention	21
19. Effect of quantitative regulation on supplies	22
20. The effect of quantitative regulation on prices in 1933	22
21. Failure to adhere to supply arrangements	25

C. The Future of Supply Regulation.

22. Need for regulation of all meat imports	26
23. Administration to be tightened up	26
24. Releases from cold store	26
25. Marking of imported meat	27
26. Regulation of home-produced supplies	27
27. Regulation of total supplies : Quantitative limit	29
28. Supply regulation : Procedure	29
29. Seasonal variations in supply regulation	30
30. Supplementary measures	30

PART III.—LIVE STOCK MARKETING SCHEME.

Paragraph.		PAGE
31.	Statement of some important recommendations ...	31
32.	A Live Stock Scheme	31
33 & 34.	Guaranteed or minimum prices	33
35.	Quantitative regulation of home-produced supplies ...	34
36.	Market intelligence	35
37.	Census and forecasts : Forms	36

Marketing Efficiency : The Scheme.

38.	Existing system capable of improvement	37
39.	Sales at auction	38
40.	Sales to butchers	38
41.	Sales on the farm	38
42.	Bird's-eye view of scheme	40
43.	Relation of producers' scheme to other interests ...	40
44.	Sales at auction	41
45.	Approval of auction centres	41
46.	Conditions of approval of auctioneers	42
47.	Producers' selected auction markets	42
48.	Normal entries for sale by auction	43
49.	Late entries and withdrawals	43
50.	Failure to consign	44
51.	Publication of anticipated pitchings	44
52.	Self-regulating character of the scheme	44
53.	" Rings " and bidding agreements... ..	45
54.	Register of approved butchers	45
55.	Conditions of approval of butchers	45
56.	Dead meat commission salesmen	46
57.	Prior selection of dead meat market unnecessary ...	46
58.	Conditions of approval of dealers	46
59.	Board to be notified of sales	47
60.	Board to have power to restrict dealing on farms ...	47
61.	Farmer to farmer sales	47
62.	Specially approved marketing centres	47
63.	Exemptions from registration	48
64.	Exemptions from marketing provisions	48
65.	Proposals may be brought into effect gradually	49

PART IV.—MARKET INTELLIGENCE.

66.	Introductory	49
67.	Information available to-day on home-produced live stock and meat	49
68.	Information available to-day on imported live stock and meat	51
69.	Types of information required	52
70.	Heads of information to be supplied automatically to the Board	52
71.	Special information to be collected by the Board ...	54
72.	Market price reports at live stock markets	54
73.	Market price reports at wholesale dead meat markets ...	55
74.	Market price reports : Offal prices... ..	55
75.	General information	56
76.	Major uses of information	56
77.	Publication of material : Discretion necessary	56

Paragraph.		PAGE
78.	Methods of publication	58
79.	Occasional publications	58
80.	Cost and finance of collecting and disseminating market intelligence	58

PART V.—PRODUCTION EFFICIENCY.

81.	Introductory	59
82.	Improvement of pastures	60
83.	Cost of stores	60
84.	The store period	60
85.	Cattle breeding policy	61
86.	Dairy herd wastage	61
87.	Cattle recording	62
88.	Heavy cattle	62
89.	Warble fly control	63
90.	Sheep breeds	63
91.	Pigs	63
92.	General efficiency campaign	63
93.	Education and research	64

PART VI.—SLAUGHTERING PROBLEMS.

94.	Introductory	
95.	The centralisation of slaughtering	
96 & 97.	The National Mark	
98-100.	Sale by grade and dead weight	65
101.	Grade and dead weight sales versus commission sales	69
102.	Canning as a surplus outlet	71
103.	Carcase insurance	72
104.	Smithfield Market	72
105.	Publicity	72

PART VII.—PORK PIGS.

106.	Pork pigs included in Scheme	73
107.	Regulation of home-produced supplies	74
108.	Regulation of imports	75
109.	Seasonality of pork supplies	75

PART VIII.—EXPLANATION OF THE SCHEME.

110.	Introductory	76
111.	Constitution of Board and method of election	76
112.	Executive Committee	77
113.	Voting power and contributions	77
114.	Chief marketing powers	78
115.	Trading powers	78
116.	Credit	79

PART IX.—SUMMARY OF RECOMMENDATIONS.

117.	Scope of recommendations	80
118.	Prices and supplies	80
119.	Marketing	81
120.	Live stock production	83
121.	Dead meat: Efficiency measures	84
122.	Pork Pigs	85

CONCLUDING OBSERVATIONS.

Paragraph		PAGE
123.	Distribution	85
124.	Co-ordination of the various Marketing Boards	86
125.	Some policy considerations	86
126.	Acknowledgments	88

TABLES I-XII.	89-102
---------------	--------	--------

APPENDICES.

A.	Draft Scheme under the Agricultural Marketing Act, 1931, regulating the Marketing of Cattle, Sheep and Pigs ...	103
B.	Suggested Census and Forecast Forms	127 and 128
C.	Suggested Form of Notification of intended Sale by Auction	129

39741

The Ministry does not accept responsibility for statements (other than those emanating from official sources) made in the advertisement pages of this publication.

MINUTE OF APPOINTMENT

In accordance with Section 15 of the Agricultural Marketing Act, 1931, I hereby constitute—

*COL. THE RT. HON. G. R. LANE-FOX, P.C., J.P., D.L.,
 H. G. HOWITT, Esq., D.S.O., M.C., F.C.A.,
 SIR JOHN BUCK LLOYD,
 JOHN BOYD ORR, Esq., D.S.O., M.C., M.A., M.D., D.Sc.
 F.R.S., and
 THE HON. JASPER RIDLEY,

as an Agricultural Marketing Reorganisation Commission for England and Wales, and charge it with the duty of preparing, in accordance with the provisions of the Act, a scheme or schemes (applicable in England and Wales) for regulating the marketing of fat stock, and I direct that the Commission, in the course of preparing any scheme as aforesaid, shall investigate and report on any matter which appears to them to affect its operation, and in particular shall investigate and report on the manner in which its operation could be facilitated.

(a) by co-operation between the board administering the scheme, and

(i) any corresponding board in Scotland or Northern Ireland,

(ii) any board that may be constituted in Great Britain or Northern Ireland for regulating the marketing of pigs and of bacon, and

(iii) any organisation concerned with the marketing in the United Kingdom of fat stock or meat produced in the United Kingdom or elsewhere;

(b) by the regulation of imports of live stock or meat or any products thereof;

(c) by improvement of the facilities for the slaughter of fat stock and for the production of commodities therefrom; and

(d) by use of the provisions of the Agricultural Produce (Grading and Marking) Acts, 1928–31.

I further appoint Col. the Rt. Hon. G. R. Lane-Fox, P.C. J.P., D.L., to be Chairman; Mr. J. B. Baber, M.C., T.D., to be Secretary, and Mr. W. H. Wilkin to be Assistant Secretary of the Commission.

(Signed) WALTER E. ELLIOT,
 Minister of Agriculture and Fisheries.

21st December, 1932.

* Col. The Rt. Hon. G. R. Lane-Fox has since been created Lord Bingley.

REPORT OF THE REORGANISATION COMMISSION FOR FAT STOCK FOR ENGLAND AND WALES.

PART I.—INTRODUCTORY.

To :

THE RIGHT HONOURABLE WALTER E. ELLIOT, M.C., M.P., Minister
of Agriculture and Fisheries.

Sir,

1. **Terms of Reference.**—In accordance with Section 15 of the Agricultural Marketing Act, 1931, we were constituted on the 21st December, 1932, as an Agricultural Marketing Reorganisation Commission for England and Wales, charged with the duty of preparing, in accordance with the provisions of the Act, a scheme or schemes (applicable to England and Wales) for regulating the marketing of fat stock. Our procedure was governed by the Agricultural Marketing (Reorganisation Commission) (England) Regulations, 1932.*

In the course of preparing any Scheme, we were directed to investigate and report on any matter which appeared to us to affect its operation and in particular to investigate and report on the manner in which its operation could be facilitated :—

(a) by co-operation between the board administering the scheme and

(i) any corresponding board in Scotland or Northern Ireland ;

(ii) any board that may be constituted in Great Britain or Northern Ireland for regulating the marketing of pigs or of bacon ; and

(iii) any organisation concerned with the marketing in the United Kingdom of fat stock or meat produced in the United Kingdom or elsewhere ;

(b) by the regulation of imports of live stock or meat or any products thereof ;

* S.R. & O. 1932, No. 396.

(c) by improvement of the facilities for the slaughter of fat stock and for the production of commodities therefrom and

(d) by use of the provisions of the Agricultural Produce (Grading and Marking) Acts, 1928-31.

2. **The desirability of a Great Britain Scheme.**—We have every reason to believe that the problems and difficulties confronting Scottish and English producers are broadly similar. We have seen that there is a very considerable cross-border traffic in live stock and meat. We anticipate that the task of synchronising and harmonising separate schemes for Scotland and England will be difficult, and we have therefore taken care to draft our Scheme in such a way that there will be no serious difficulty in converting it into a scheme for the whole of Great Britain, if it be the pleasure of producers that there shall be one scheme. We know that our Scottish colleagues have pursued a similar course. In our view the most workable plan will prove to be the adoption of one scheme for the whole of Great Britain.

3. **Scope of recommendations.**—Our terms of reference were wide and we have construed them accordingly. For the reasons set out in paragraph 32 we are extending our proposals to cover live stock as a whole and not only fat stock. Our proposals are broadly designed to assist the live stock industry in this country to hold and develop its share of the meat market and to retain its position as the premier* branch of the country's agriculture—a position which in recent years it has shown signs of losing mainly owing to the unregulated importation of meat. The issues involved are, however, so complex that we have not attempted to produce a plan for the rehabilitation of the entire home-produced meat industry, complete in all details, from the point of selection of suitable stock down to such technical details as the best methods of utilising by-products. We have, therefore, indicated what we regard as the essential measures of reorganisation which should be undertaken in the immediate future, and we have also endeavoured to sketch the lines on which we think the development of the industry as a whole should proceed if it is to keep pace both with meat production in exporting countries and with other branches of agriculture at home. We only suggest the lines of future development for further consideration by the Board administering the Marketing Scheme. It may be that experience will show that our suggestions need modification, and we are anxious that in that event the Board should have both liberty and power to adopt the line of action which at that time seems most likely to lead to increased efficiency.

4. **Interests consulted.**—We have received much valuable evidence and assistance from numerous individuals and bodies interested in various aspects of our task, from farmers, dealers, auctioneers

* See Table I.

market authorities, wholesale and retail butchers, the trade unions connected with the meat trade and the consumers' co-operative movement. In particular, our consultations with the Scottish Reorganisation Commission for Fat Stock, under the Chairmanship of Major Sprot of Riddell, have proved of the greatest value. We have also had placed before us a mass of information collected by the Ministry of Agriculture and Fisheries, much of which will be found in the Ministry's Economic Series of Reports.

PART II.—SUPPLY REGULATION.

A. VOLUME AND SEASONALITY OF SUPPLIES (1927-1931).

5. **General.**—The meat supplies of this country, with which this report is concerned, comprise beef and veal, mutton and lamb, and pork. Beef supplies consist of fresh beef, chilled beef, frozen beef, canned beef, and negligible quantities of salted beef. Fresh beef is derived from cattle fed in England, Wales, Scotland and Northern Ireland, and from cattle imported from Canada and the Irish Free State; chilled beef is at present supplied almost entirely from South America; frozen beef comes mainly from Australia, New Zealand and South America; canned beef is mainly of South American origin. Veal supplies are almost entirely home-fed and home-killed.

Supplies of mutton and lamb consist chiefly of fresh meat, home-fed and home-killed, and of frozen meat imported from Australia, New Zealand and South America.

Pork supplies consist of fresh meat fed in Great Britain or imported from the Irish Free State, of frozen carcasses imported from Australia, New Zealand, United States of America and South America, and of small quantities of salted pork, mainly from Denmark.

6. **Volume of supplies.**—Table II shows the estimated number of animals sold off farms for slaughter and the estimated production of dressed meat from these animals in Great Britain for the years 1927-1932. Table III shows the sources and estimated meat equivalents of fat animals landed in Great Britain in the years 1927-1932, and Table IV gives for the same period the estimated total supplies of home-fed and imported meat for Great Britain. Table V, which is based on the average imports for the years 1927 to 1931, indicates the chief sources of the principal classes of imported dead meats and their relative importance.

The following statement shows the proportions in which home-fed supplies and imports contributed to the total meat supplies of Great Britain in the periods 1909-13 and 1927-31 :—

MEAT SUPPLIES

	Average 1909-13.			Average 1927-31.		
	Quantities Million cwt.	Per cent. of total.		Quantities Million cwt.	Per cent. of total.	
		of class of meat.	of all meat.		of class of meat.	of all meat.
<i>Beef and Veal* :</i>						
G.B. Production	12.6	53	27	12.4	45	22
Net Imports to U.K.	11.1	47	24	15.0	55	27
Total ...	23.7	100	51	27.4	100	49
<i>Mutton and Lamb :</i>						
G.B. Production	5.6	50	12	4.9	43	9
Net Imports to U.K.	5.7	50	12	6.5	57	12
Total ...	11.3	100	24	11.4	100	21
<i>All Pig Meat† :</i>						
G.B. Production	5.3	45	11	5.6	35	10
Net Imports to U.K.	6.4	55	14	10.3	65	20
Total ...	11.7	100	25	15.9	100	30
<i>All Meat :</i>						
G.B. Production	23.5	—	50	22.9	—	41
Net Imports to U.K.	23.2	—	50	31.8	—	59
Total ...	46.7	—	100	54.7	—	100

N.B.—The estimates of Great Britain production are based on the Annual Agricultural Returns. The imports of dead meat are for the United Kingdom and are extracted from the Annual Statement of Trade; they include the estimated meat equivalent of fat animals landed at Great Britain ports.

* Includes canned beef.

† In order to show total meat supplies figures are given for all pig meat i.e., including bacon and canned products.

Comparing the two five-year periods 1909-13 and 1927-31 the annual total meat supplies available in Great Britain show an increase of 17 per cent., while the population increased by about 8.9 per cent. The whole of that increase in supplies accounted for by imports which increased by 37 per cent. Of the increase of 8.6 million cwt. in imports, 3.9 million cwt. was in respec

of pig meat and 3·9 million cwt. in respect of beef. The rate of increase accelerated greatly during 1931 and the early part of 1932 (paragraph 19 and Table IV).

7. **Seasonality of supplies of butchers' meat.**—In examining the seasonality of supplies of butchers' meat, we have confined our attention to fresh, chilled and frozen beef, fresh and frozen veal, fresh and frozen mutton and lamb, and fresh, salted and frozen pork. The principal kinds of meat derived from cattle, sheep and pigs, which we have not regarded as comprising part of the supply of butchers' meat, are bacon and hams with which we are not directly concerned, and tinned and canned beef and pig meat. The gross imports of canned meat of these kinds in recent years are shown below :—

	Tinned and canned beef			Tinned and canned pig meat		
	From Empire countries.	From foreign countries.	Total.	From Empire countries.	From foreign countries.	Total.
	cwt.	cwt.	cwt.	cwt.	cwt.	cwt.
1927	37,472	932,188	969,660	5,004	99,860	104,864
1928	41,054	928,354	969,408	6,968	116,849	123,817
1929	17,754	854,177	871,931	9,551	134,814	144,365
1930	17,892	1,079,012	1,096,904	7,095	142,308	149,403
1931	8,527	1,065,926	1,074,453	7,693	157,600	165,293
Average of 1927-31	24,540	971,931	996,471	7,262	130,286	137,548
1932	21,582	731,002	752,584	5,756	140,560	146,316
1933	(a)	(a)	855,303	(a)	(a)	174,856

(a) Details not yet published.

During the years 1927 to 1931 the average annual supplies of the various categories of butchers' meat were as follows * :—

	Cwt. 000	Percentage of Total.
Beef	25,851	60·6
Veal	908	2·1
Mutton and Lamb	11,260	26·4
Pork	4,630	10·9
Total	42,649	100·0

* For detailed analysis see Table VI.

Total supplies of butchers' meat are fairly steady from month to month, although there is a tendency for supplies to increase from August to November, followed by a steep rise in December. The months of maximum supply in order of importance are December, October, November, January (see Diagram A.1).

The seasonal regularity of the meat supply of Great Britain is due to a large extent to the fact that the market is fed by supplies from all parts of the world. Table VII summarises, by classes of meat and by producing countries, the conditions of the import trade, and includes a "time-table" of production and of arrival in this country.

The natural dovetailing of the grazing seasons of the northern and southern hemispheres, aided by the use of cold storage and arrangement of shipping programmes, has a balancing effect on the month to month supplies and, since the bulk of meat imports come from the southern hemisphere (i.e., Argentina and Australasia), monthly imports fluctuate inversely with home production. Thus whereas imports of dead meat normally constitute about 45 per cent. of the total supplies of butchers' meat, the percentage varies between about 52 per cent. in May, June and July and 37 per cent. in November—months in which home production is around the lowest point and at the highest respectively.

The second factor making for stability in seasonal supplies is the displacement of one class of meat for another, which takes place within the year (see Diagrams A.2 and A.3). Thus while the supply of butchers' meat as a whole falls off in the summer months there is a tendency for the decrease in the supplies of beef in these months to be offset by heavier supplies of the lighter meats, mutton and lamb.

Despite the influence of the various factors—natural, economic and dietetic—which tend to smooth out the meat supplies from one month to another, the average supply of butchers' meat in the months October to January is 8 per cent. above the average monthly supply, an increase which is accounted for by a rise in home-killed supplies to 19.6 per cent. above their monthly average, whereas the supplies of imported dead meat only fall to 6.5 per cent. below their monthly average. In consequence, for all classes of butcher meat except pork, wholesale prices in the months of October, November and December are lower than in the third quarter of the year, and in most cases are below the year's average price (See Tables VIII to XI.)

8. Seasonality of home-killed beef supplies.—The monthly supplies of home-killed* beef (including veal) vary to a great

* Supplies of home-killed beef are derived from cattle fed in Great Britain and Northern Ireland and imported from Canada and the Irish Free State.

INDICES OF THE AVERAGE MONTHLY SUPPLIES OF BUTCHERS' MEAT IN GREAT BRITAIN 1927 - 1931

(MONTHLY AVERAGE = 100)

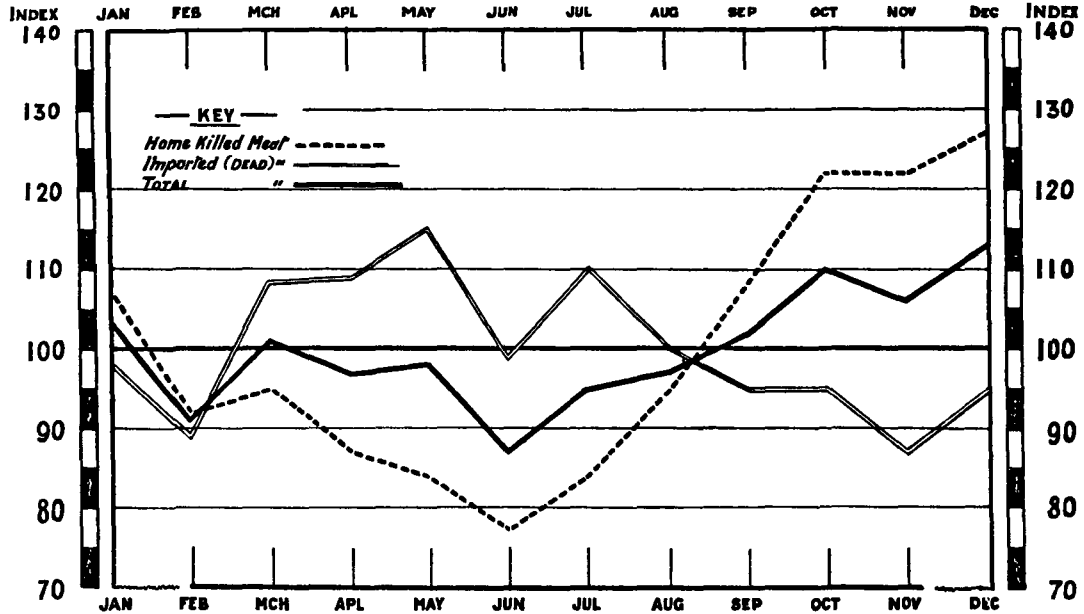


DIAGRAM A-1

INDICES OF THE AVERAGE MONTHLY SUPPLIES OF BEEF AND VEAL IN GREAT BRITAIN 1927-1931

(MONTHLY AVERAGE = 100)

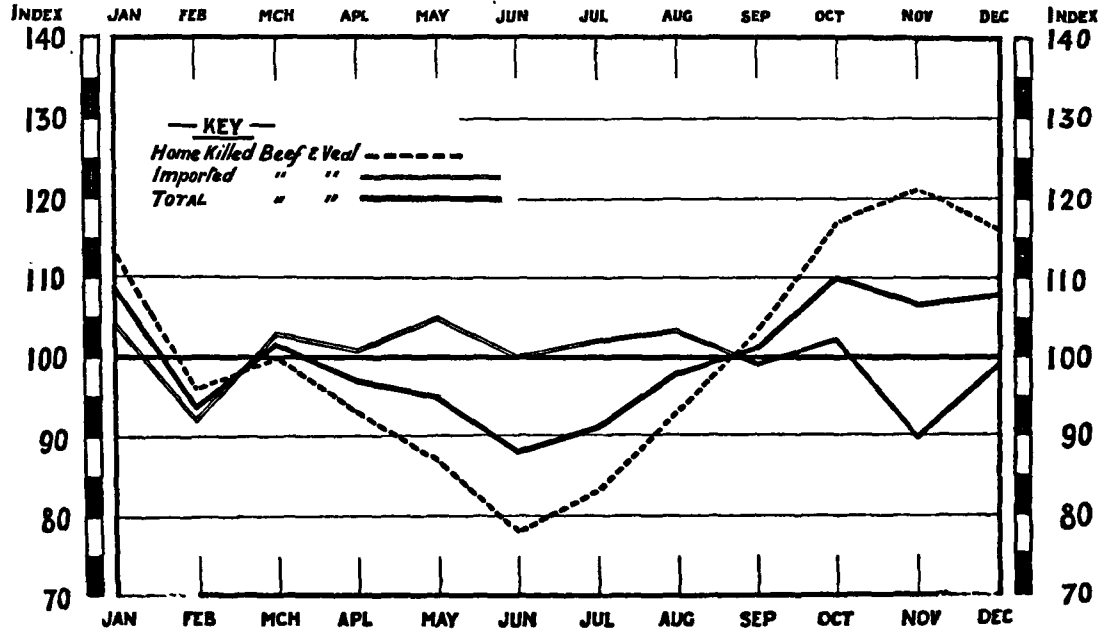


DIAGRAM A-2

INDICES OF THE AVERAGE MONTHLY SUPPLIES OF MUTTON AND LAMB IN GREAT BRITAIN 1927-1931

(MONTHLY AVERAGE = 100)

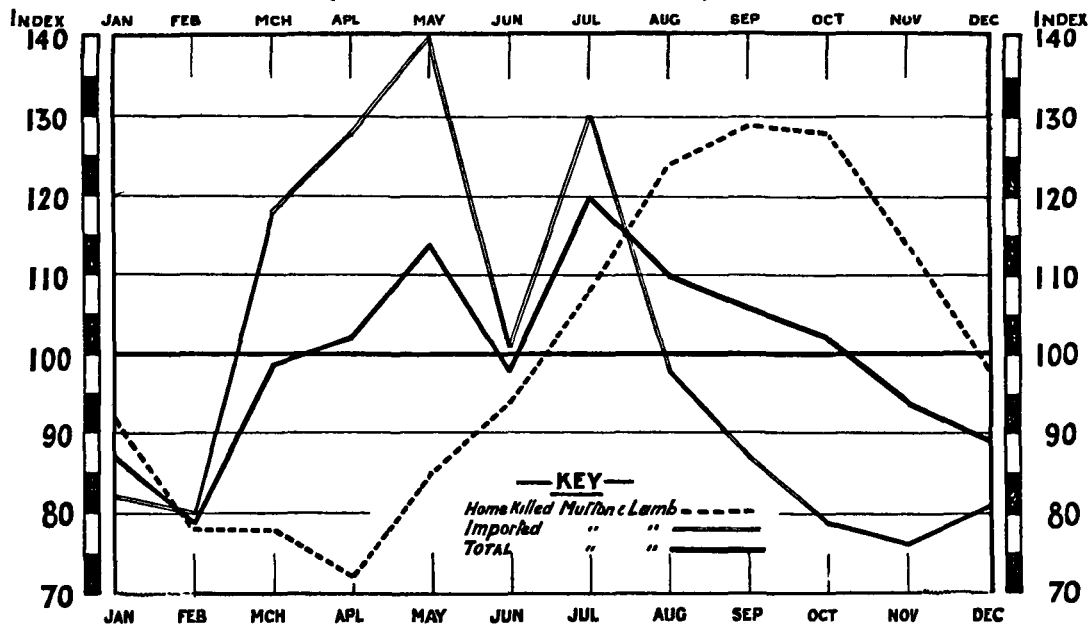


DIAGRAM A-3

INDICES OF THE AVERAGE MONTHLY SUPPLIES OF HOME KILLED AND HOME FED BEEF AND OF PRICES OF ENGLISH LONG SIDES, 1927-1931.

(MONTHLY AVERAGE = 100)

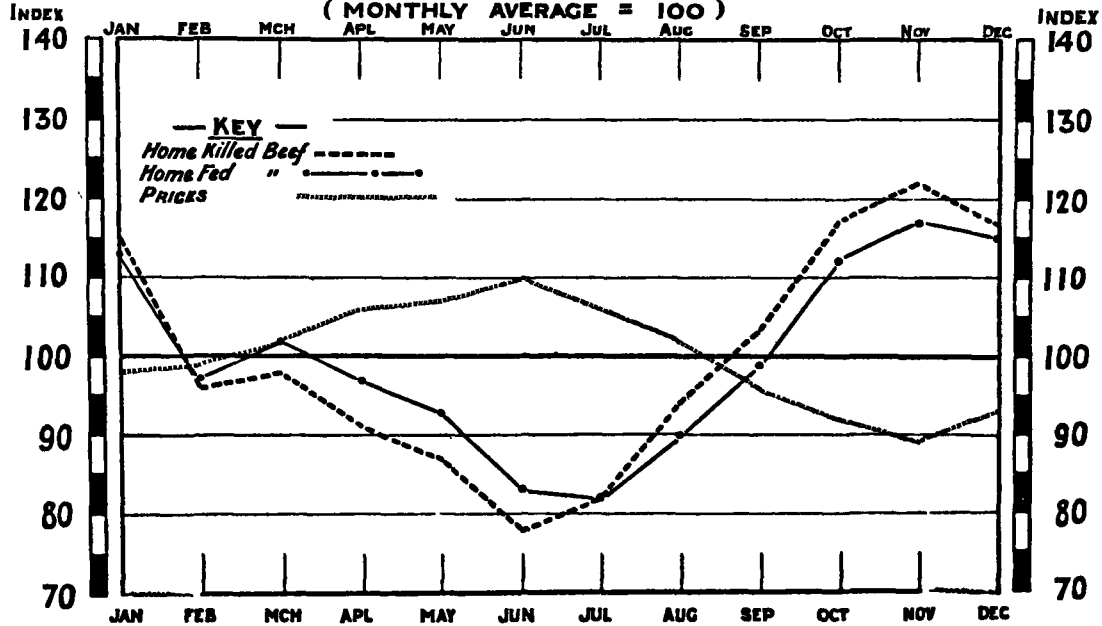


DIAGRAM B

extent than those of imported chilled beef or than total beef supplies. Apart from a slight increase in March, they fall from January to June, and then increase to a peak in November, with big increases in August, September and October (see Diagram B). The progressive increases result in particularly heavy supplies in the last three months of the year and in January, average monthly supplies in this period being 50 per cent. greater than in June.

The seasonality of the home-killed beef supply is a direct result of the prevailing system of beef production in the United Kingdom and the Irish Free State. Apart from a small increase in supplies in March, which is confined to cattle fed in Great Britain, stall-fed supplies fall off from January onwards and are practically cleared out by June. The grass-fed cattle, the earliest of which may have been started in yards, begin to come on to the markets in June and July, and increase in numbers as the year advances until the grass fails. Imports of fat cattle from Canada do not show this autumn seasonality, but have been inconsiderable in volume. Supplies from the Irish Free State, on the other hand, are even more markedly seasonal than those of Great Britain; they reach their lowest point in May or June, when they account for only about 5 per cent. of the fresh beef supply, and usually attain their highest point in October, when they account for an average of 16.5 per cent. of the fresh beef supply. It is clear, therefore, that the effect of the seasonality of the fresh beef supply is considerably aggravated by imports of fat stock for slaughter from the Irish Free State.

9. Seasonality of marketings and killings of home-fed cattle in England and Wales.—Investigations which we have made in regard to the monthly numbers of fat cattle arriving at 34 representative markets and the monthly killings at 33 public abattoirs in England and Wales have shown that there is a marked difference between the period of heaviest sales of live animals and the period of heaviest killings. The sales figures at these 34 markets indicate a definite peak in fat stock supplies in October and November with a considerable reduction in December, whereas the slaughtering figures of home-fed cattle at the 33 public abattoirs indicate that the months of heaviest supply are November, December and January. It thus appears that there is a lag between the marketing and the slaughter of a proportion of the cattle in the autumn, and that this lag is for a period of about two months, i.e. from October–November to December–January. We can only explain this lag by the theory that a number of producers are compelled by lack of grass to sell their cattle in the late autumn in a half fat condition. We refer to this matter again in paragraph 14.

10. **Supplies and prices of beef in the autumn.***—The following table shows the normal relationships between supplies and prices of beef in the last five months of the year :—

Average supplies and prices of fresh and chilled beef and of fat cattle for the months August to December expressed as percentages of the monthly averages, 1927-1931.

Month.	Supplies.			Prices.		
	Home-killed.	Chilled.	Fresh and Chilled.	Fat Cattle.	Home-killed.	Chilled.
	Per cent.	Per cent.	Per cent.	Per cent.	Per cent.	Per cent.
Aug. ...	94	95	94	101	102	108
Sept. ...	103	92	99	97	96	104
Oct. ...	117	93	108	93	92	102
Nov. ...	122	85	107	92	89	102
Dec. ...	117	93	106	95	93	100

There is a very close relationship between the supplies and prices of home-killed beef during the autumn glut period, and, despite the ramifications of the meat market, it seems that during this period the dominant factor in determining home-killed beef prices is the supply of home-killed beef. The close relationship between autumn supplies and prices does not, however, prevail in the case of chilled beef. Chilled beef prices exhibit a marked seasonal movement at this, as at other times of the year, but those movements in the autumn are closely linked to movements in home-killed beef prices and consequently to changes in home-killed and not in chilled supplies, which at that period of the year are well below average. There is, however, an important qualification to this statement. A large and sudden increase or decrease in the supply of chilled beef is generally accompanied by a price movement in the opposite direction; thus, for instance, in November, 1927, a 14 per cent. decline in chilled beef imports caused a rise in chilled beef prices, despite the fact that home-killed beef prices fell.

11. **Seasonality of marketings and killings of sheep and lambs in England and Wales.**—The determination of the seasonality of the mutton and lamb supply is a matter of some difficulty. As in the case of beef, the statistics of abattoir slaughterings of home fed sheep and lambs in England and Wales show a different seasona

* For comparisons between supplies and prices, total supplies for Great Britain have been taken since imports cannot be divided between England and Scotland.

**INDICES OF THE MONTHLY SUPPLIES OF HOME
KILLED MUTTON AND LAMB AND THE PRICES OF ENGLISH
MUTTON, 1927-1931.**

(MONTHLY AVERAGE = 100)

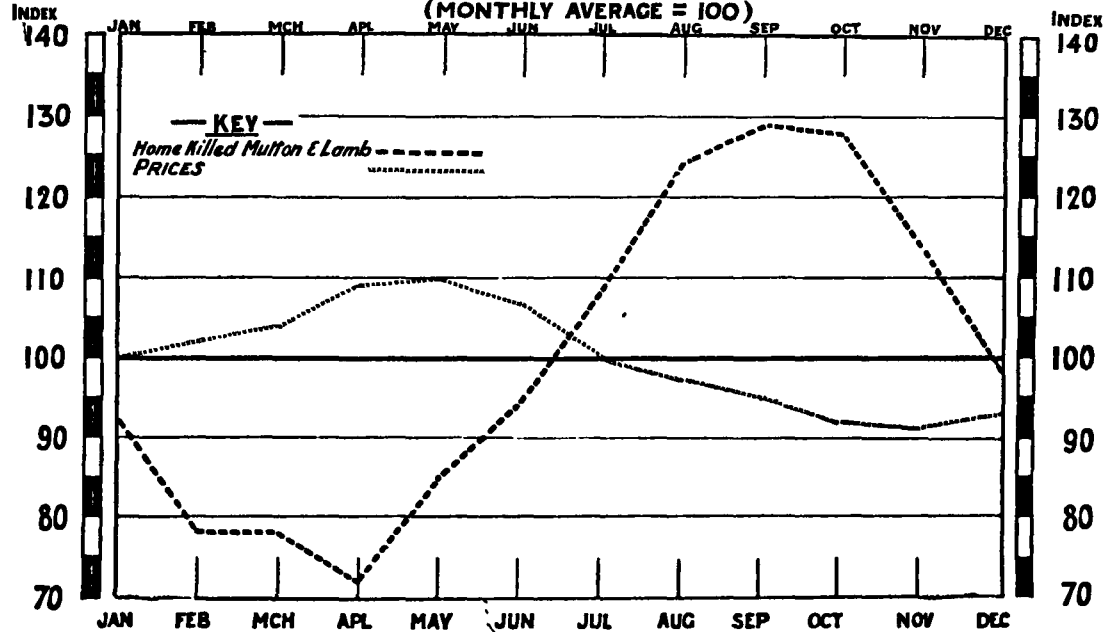


DIAGRAM C.

curve from that obtained from the figures of sheep and lambs entered for sale at representative markets. Both show a drop in February and again from October to the end of the year. The slaughtering curve, however, shows a steady increase from April to a peak in September or October, whereas the sales curve shows a rise from March to August, the latter month constituting the peak. Since sheep, unlike cattle, do not appear to be held over after purchase by butchers to any appreciable extent, we have had some difficulty in arriving at any conclusion as to the reason for the discrepancy between the marketing and slaughtering data. From enquiries we have made, it seems probable that in all years, and particularly in 1932, many lambs sold as "stores" in September and October—and therefore omitted from our sales data—are, in fact, slaughtered immediately, while, on the other hand, the available data as to slaughtering are not sufficiently comprehensive to take adequate account of the migration of population from the large towns to holiday resorts in July and August, when mutton and lamb are the more popular meats. An adjustment of these two deficiencies in the statistics obtained would have the effect of retarding the peak period of marketings for slaughter and of advancing—possibly only slightly—the peak period of the actual slaughtering.

Both sets of data are subject to the criticism that they refer to numbers killed or offered for sale and take no account of the average weight per animal, which increases considerably as the season advances. Despite these difficulties, it is possible to draw broad conclusions as to the seasonality of the mutton and lamb supply and its relationship to the seasonality of other classes of meat.

The supply of home-fed mutton and lamb, as measured by the abattoir data, is well above the average in the last six months of the year and below the average during the first six months of the year (see Diagram C). The flow of supply increases with the marketing of milk-fed lambs in May and, since sheep are now mainly produced on grass, the increase continues throughout the summer. In September, October and November the peak in supplies is caused by the heavy sales of lambs from the uplands, where there is insufficient keep for winter fattening. From December to April the market has to rely mainly on mutton produced in arable areas. Very few fat sheep and lambs are landed from Ireland for slaughter in the months of December to April, the peak of imports being reached in September. In any case the volume of imported live sheep and lambs is not sufficient appreciably to affect the seasonality of supplies.

12. Supplies and prices of mutton and lamb in the autumn.*—
The following table shows the normal relationships between supplies

* For comparisons between supplies and prices, total supplies for Great Britain have been taken since imports cannot be divided between England and Scotland.

of home-killed and imported mutton and lamb and prices of mutton* in the last five months of the year :—

Average supplies of home-killed and imported mutton and lamb and prices of fat sheep, mutton and lamb for the months August to December expressed as percentages of the monthly averages, 1927-1931.

	Supplies.			Prices.			
	Home-killed.	Im-ported.	Total.	Home-killed.		Imported.	
				Fat sheep.	Mutton.	Mutton.	Lamb.
Aug. ...	124	98	110	96	97	100	100
Sept. ...	129	87	106	96	95	103	100
Oct. ...	128	79	102	93	92	100	100
Nov. ...	114	76	94	93	91	95	96
Dec. ...	98	81	89	98	93	93	95

As with beef, the autumn glut is accounted for by the heavy supplies of home-killed mutton and lamb, but the incidence of the autumn glut in home-killed mutton and lamb differs considerably from one year to another, and consequently the average figures shown above should be treated with caution. While, on the basis of abattoir data, the peak month for the home output is usually October, in some years it is September or even August, with the result that the total supply of home-killed mutton and lamb in the last three months of the year varies. It is interesting to note that, when the peak of home-killed supplies comes in August, the prices of home-killed supplies in the autumn tend to be nearer the annual average than when the peak of supplies comes in September or October.

There is a fair degree of correlation between the supplies and prices of home-killed mutton and lamb in the last five months of the year. Apart from 1929 and 1930, when the peak of home-killed supplies came abnormally early, the general position is that in all these months, except November, supplies and prices move in opposite directions. The dominant factor determining the prices of home-killed mutton and lamb would, therefore, seem to be the supply of home-killed mutton and lamb. The supply-price relationship, however, changes from month to month. There is a progressive fall in prices from August to November, although within this period there is considerable variation in the volume of home-

* Prices of home-fed lambs have not been taken into account owing to their very wide seasonal variations.

killed supplies. Moreover, prices continue to fall in November despite the substantial decrease in supplies, and in December the rise in prices is very small compared with a very substantial decline in the supply to a point below the monthly average.

The low level of home-killed mutton and lamb prices in November and December, when supplies of home-killed mutton and lamb are decreasing in volume, cannot be explained by changes in imports either of mutton and lamb or of other meats. Although imports of mutton and lamb usually are below the average and continue to fall from August to November, increasing a little in December, the prices of the imported article in November and December are usually below the average. The most reasonable explanation of the exceptional supply-price relationship in November and December offers itself when a comparison is made between prices of home-killed beef and home-killed mutton during these months. The similarity of movement suggests that in November and December the heavy supplies and falling prices of home-killed beef have an over-riding effect on the market for home-killed mutton and lamb. It is possible also that at this time of the year there is a conscious shifting of consumer-demand from mutton and lamb to beef and pork; that in August and possibly in early September mutton and lamb are more favoured meats than beef, but that around October a process of transfer of demand to beef as a heavier meat is set in motion.

13. **Seasonality of home-killed pork supplies.**—Rather more than 80 per cent. of the total pork supplies consumed in Great Britain is home-fed. Apart from a slight increase in March, home-fed pork supplies fall off from January to July and then increase until the end of the year, with particularly sharp increases in September, October and again in December. The course of pig supplies from Northern Ireland and the Irish Free State is very similar, except that the trough is reached in June and there is no big increase from November to December. In both cases the supply is nearly four times greater in the peak than in the trough month. Although supplies of home-killed pork rise to a peak at the end of the year, it cannot be said that the heavy supplies constitute a seasonal glut, since they are cleared at prices around the yearly average.* The increase in supplies is probably counterbalanced by an increase in demand.

14. **Special problem of the autumn glut.**—Generally speaking, the price problem confronting the home producer has been caused by the impact of imports upon the United Kingdom market in increasing volume, but the particular autumnal aspect of it is caused not by imports but by a heavy home-produced supply. In the normal

* The course of the pig cycle, however, may be such that, in a particular year, prices in the autumn may be slightly lower than for the year as a whole.

course of events it is to be expected that the output of fat stock, fattened cheaply on summer grass, will result in the offer of heavy supplies at the end of the grazing season. This natural tendency is not one to be discouraged, but trouble is caused by the simultaneous offer for sale not only of fat stock but of half-fat stock which producers have to clear off the farm when the grass fails. Before the War and in the earlier post-War years these half-fats were bought for finishing in the arable areas. With the subsequent decline of arable farming, however, there has been a tendency for farmers who had previously fattened their beasts during the winter—and obtained the benefit of better prices in the spring—to sell out or to refrain from buying in the autumn. At the same time there has been a decreasing price incentive to graziers to spend money in finishing their beasts before lack of grass compelled their sale. Thus circumstances have combined to increase the load on the home-killed meat market in the autumn, and to cause much of the increase to be of a quality calculated to meet with a poor demand. As stated previously, fat cattle imported from the Irish Free State accentuate the glut.

While the home production of mutton and lamb contributes to this glut in some seasons more than in others, it suffers from the glut to an equal extent. We believe therefore that, in suggesting measures which will alleviate the effect of the glut on the cattle grazier, we shall at the same time give real help to the sheep farmer.

It appears to us that the solution of the problem of the autumn glut of home-fed cattle is to encourage the grass feeder to finish his cattle properly by securing for him a remunerative market for those cattle. This should incidentally avoid the waste caused by the short-term transfer referred to in paragraph 9. In the recommendations which we make later regarding the regulation of meat supplies throughout the year, we attach particular importance to the reservation for the home producer of an adequate share of the market during the season of his heaviest output, which will also be that part of his output which will have cost least to produce.

B. THE REGULATION OF MEAT IMPORTS, 1932-1934.

15. **Introductory.**—Attention has already been drawn in paragraph 6 to the considerable increase in supplies relative to the increase in population compared with pre-War days, an increase for which imports are entirely responsible. Actually during the three years immediately preceding the Imperial Conference at Ottawa, i.e., from July, 1929, to June, 1932, the annual imports had increased by nearly 4 million cwt. at the same time as there had been a world-wide decline in purchasing power, and the prices of live stock in this country, and indeed throughout the Empire, were falling rapidly. Accordingly, arrangements were made at Ottawa to stem the

prevailing depression by checking the flow of imports of meat into this country, which was virtually the only market for exporting countries.

16. The Ottawa Agreements.—Briefly, the arrangements agreed between the United Kingdom and the Dominions* provided for :—

1. The regulation of imports of foreign beef, mutton and lamb in accordance with an agreed programme which was to take effect as from the 1st January, 1933 ; and

2. The stabilisation during 1933 of the supplies of frozen mutton and lamb from the Dominions and for a limited increase in Dominion supplies of frozen beef.

The declaration by the United Kingdom Government, in which the Dominion Governments concurred, stated that it was essential to take whatever steps were feasible to raise wholesale prices of frozen meat “ to such a level as will maintain efficient production ” : the improvement of prices was stated to be necessary both in the immediate interest of producers and in the long-term interest of consumers. In addition, the declaration laid down the principles of a meat policy which were, firstly, to secure the development of home production, and secondly, to give the Dominions an expanding share of imports into the United Kingdom.

For the purpose of the agreed programme, the year July, 1931–June, 1932, was taken as a standard. Accordingly, it was decided that, as from the 1st January, 1933, imports of foreign chilled beef should be restricted in volume to the amounts imported in the standard year, which were in fact only 93 per cent. of the average of the years 1927–1931. This restriction affected South American countries only, namely Argentina, Uruguay, and Brazil.

In the case of frozen beef and frozen mutton and lamb, which are imported both from the Dominions and from foreign countries, the arrangement was that the Australian and New Zealand Governments each undertook that their exports of mutton and lamb during 1933 would not exceed the amount exported in the Ottawa year : as regards frozen beef, Australia promised to use her best endeavours to ensure that her exports in 1933 should not be increased to an extent exceeding 10 per cent. of the quantity exported in the Ottawa year, while New Zealand estimated that her exports for the season 1932-3 would be approximately 10 per cent. more than in the Ottawa year. In the case of frozen carcass and boned beef and frozen mutton and lamb imported from foreign countries, imports were not to exceed, for the first quarter of 1933, 90 per cent. of those in the corresponding quarter of the Ottawa year, in the second quarter they were not to exceed 85 per cent. of the imports in the corresponding quarter of the Ottawa year, and so on by progressive reductions of 5 per cent. each quarter until in the second

* The agreements are embodied in the Ottawa Agreements Act, 1932.

quarter of 1934 imports from foreign sources should stand at 65 per cent. of the amount imported in the corresponding quarter of the Ottawa year. Thereafter, until December, 1937, foreign imports were to be stabilised at 65 per cent. of those in the corresponding quarter of the Ottawa year unless, in the meantime, other arrangements had been agreed. For the purposes of the regulation of imports, frozen veal was regarded as frozen beef.

During the period January, 1933, to June, 1934, the United Kingdom Government agreed not to impose any restrictions on imports of Australian and New Zealand meat. While, therefore Australia and New Zealand are not committed in any way in regard to their shipments after 31st December, 1933, the United Kingdom may not impose any restrictions on Australian and New Zealand supplies before 30th June, 1934. After June, 1934, the United Kingdom will be free to regulate imports of Dominion meat in the interests of United Kingdom agriculture, but it is provided that in taking such action regard shall be had to the over-riding policy of securing to the Dominions an expanding share of imports.

17. **Emergency action in 1932.**—The Ottawa arrangements were due to come into operation on the 1st January, 1933. During the autumn of 1932; however, the live stock markets of the country collapsed, prices of all classes of fat stock falling heavily. Following rapid discussions between the United Kingdom Government on the one hand, and representatives of the Dominion and foreign Governments and the South American Meat Importers' Freight Committee on the other, the following voluntary arrangements, to take immediate effect, were made :—

The South American meat shippers voluntarily agreed to reduce their marketings of chilled beef to the United Kingdom by 10 per cent., and, if necessary, by 20 per cent., during the months of November and December, 1932. They also agreed to reduce by 20 per cent. their supplies of mutton and lamb for the same period. These reductions were to apply to the quantities which they had intended to ship before the agreement was reached. The Australian and New Zealand Governments also agreed, without prejudice to their position under the Ottawa Agreements, to reduce their shipments of frozen mutton and lamb to the United Kingdom in November and December to 10 per cent. below their shipments in the corresponding months of 1931. No reductions were arranged in the case of imports of frozen beef.

The continued weakness of the market, particularly in the case of beef, made it advisable to continue this policy into 1933 as regards chilled beef, and further voluntary arrangements were made under which total imports of chilled beef during the first quarter were not to exceed 90 per cent. of the imports in the corresponding

quarter of 1932. In the second quarter of 1932, imports of chilled meat were less than in the first quarter, whereas normally they are heavier. Accordingly for the second quarter of 1933 only a small percentage cut on the figure for 1932 was arranged. The failure of the market for beef to respond to this small reduction, however, made it essential that a further reduction should be made in the third quarter. It was, therefore, arranged that, for the first half of this period, imports of chilled beef should not exceed 90 per cent. and, for the second half, 87½ per cent. of the imports in the corresponding period of the Ottawa year, i.e., July-September, 1931. For the last quarter, imports of chilled beef were to be reduced to 85 per cent. of those in the corresponding quarter of the Ottawa year. No further special arrangements additional to the Ottawa Agreements were made in respect of mutton, lamb and frozen beef.

18: **The Argentine Convention.**—To complete the story, it is desirable to summarise the main provisions affecting meat in the trade agreement, signed on 1st May, 1933, between His Majesty's Government and the Government of the Argentine Republic. The Convention, which operates for a minimum of three years from the date of ratification*, provides that imports of chilled beef from Argentina are not to be reduced below the quantity imported in the corresponding quarter of the Ottawa year unless, after consultation with the Argentine Government, it is thought that such action is necessary in order to secure a remunerative level of prices in the United Kingdom market. No such restriction is to be maintained if it appears that the imports so excluded are being replaced by increased imports into the United Kingdom of other kinds of meat (other than experimental shipments of chilled meat from other parts of the British Commonwealth of Nations) with the result of neutralising the desired effect on prices. If, owing to unforeseen circumstances, His Majesty's Government consider it necessary that imports from Argentina of chilled beef should be reduced in any year by an amount more than 10 per cent. below the quantity imported during the Ottawa year, it is provided that imports from all the Dominions shall be reduced by the percentage over and above 10 per cent. that imports from the Argentine are reduced. Reductions, beyond those laid down at Ottawa, on imports of frozen beef, mutton and lamb from Argentina shall not be made unless the import of such meat from Empire sources is also restricted. In the Supplementary Agreement to the Convention, His Majesty's Government have undertaken not to impose any duties on meat, other than tinned, canned, extracts and essences, the duty on which cannot be increased beyond the existing rate of 10 per cent. ad valorem.

* 7th November, 1933.

19. Effect of quantitative regulation on supplies.—The following table shows the effect upon supplies in 1933 of the agreements and arrangements described in the previous paragraphs and also of the voluntary reductions which have been made in the supplies of bacon (including hams) which to a degree is interchangeable with butchers' meat :—

Imports of Regulated Classes of Meat and of Pork.
(000 cwt.)

	Chilled beef.	Frozen beef and veal.	Frozen mutton and lamb.	Fresh, salt and frozen pork.*	Total butchers' meat.	Bacon and hams.	Grand total
1931—							
July-Sept. ...	2,246	749	1,829	168	4,992	3,057	8,04
Oct.-Dec. ...	2,112	881	1,625	277	4,895	3,100	7,99
1932—							
Jan.-March ...	2,285	539	1,637	169	4,630	3,177	7,80
April-June ...	2,200	469	2,248	143	5,060	2,967	8,02
July-Sept. ...	2,207	959	1,820	119	5,105	2,997	8,10
Oct.-Dec. ...	2,107	733	1,222	205	4,267	3,051	7,31
1933—							
Jan.-March ...	2,050	631	1,802	199	4,682	2,575	7,25
April-June ...	2,194	682	2,057	159	5,092	2,599	7,69
July-Sept. ...	2,028	1,056	1,776	197	5,057	2,533	7,59
Oct.-Dec. ...	1,901	713	1,020	283	3,917	2,248	6,16
Total Ottawa							
year ...	8,843	2,638†	7,339†	757	19,577	12,301	31,87
Total 1932 ...	8,799	2,700	6,927	636	19,062	12,192	31,25
Total 1933 ...	8,173	3,082	6,655	838	18,748	9,955	28,70

* Imports of fresh, salt and frozen pork, are included in the Table although imports of fresh and frozen pork are not regulated, and imports salt pork only came under regulation towards the end of 1933.

† These figures include 89,994 cwt. of frozen beef and 10,661 cwt. frozen mutton and lamb which passed through this country on through Bills of Lading to other countries. Such imports are now transhipped under Bond, and for the calculation of current import quotas the Ottawa year figures are reduced by the amounts sent on through Bills of Lading.

20. The effect of quantitative regulation on prices in 1933.—The following table shows the price conditions which the arrangements discussed in the preceding paragraphs sought to remedy :—

Average Annual Prices of Fat Stock in England and Wales compared with pre-War Years.*

Year.	Fat cattle per live cwt.	Fat sheep per lb. d.w.	Porker pigs per score d.w.	Index of prices.		
				(1911-13=100.)		
				Fat cattle.	Fat sheep.	Porker pigs.
	<i>s. d.</i>	<i>d.</i>	<i>s. d.</i>			
1924	53 2	14	14 9	153	187	139
1925	52 7	13·75	17 5	151	183	164
1926	49 0	11·75	19 6	141	157	184
1927	44 3	11·25	16 5	127	150	155
1928	48 1	12·5	14 8	138	167	138
1929	46 5	11·75	17 6	133	157	165
1930	46 2	12	17 6	133	160	165
1931	42 7	10	13 0	122	133	123
1932	39 11	7·25	10 4	115	97	98
1933	35 2	8·25	11 6	101	110	109

Following the application of quantitative regulation, there was a rise in the prices of fat sheep and pigs. The price of beef, however, after a temporary rise, remained at a low level. In November, 1932, when restriction of imports was imposed, there were indications of a catastrophic fall in beef prices. The arrest of that fall, even at the low level for beef indicated in the table, has been of material assistance to the live stock industry in this country. It is desirable, however, not only that the fall should have been arrested, but that there should be a rise in price. Two factors, to which we may briefly refer, intervened in 1933, which prevented the full effects of quantitative regulation. In our scheme we make recommendations to deal with these factors.

The first factor was the absence of knowledge as to the volume of home-produced meat coming forward. In 1933, the Agricultural Returns collected on 4th June showed a considerable increase in the numbers of cattle over one year old, but thereafter there was no reliable method of measuring the numbers of stock coming forward or likely to come forward for slaughter. It was likely that the drought would retard the rate of marketing of grass-fed cattle and would at the same time lower the yield of winter keep, in which case the numbers of cattle that would be retained for yard-feeding would probably be less than usual. Everything, therefore, pointed to unusually heavy offerings of stock, and possibly of half-finished stock, at the close of the year. The meagre knowledge available suggests that this happened, and the fact that cattle prices maintained

* Agricultural Index Number Prices, i.e., 2nd quality animals weighted according to the importance of various breeds.

themselves, though at an admittedly low level, at a time of the year when they habitually fall, can only be due to the fact that the maximum reductions in the volume of meat imports all took effect at that time.

The exceptional weather in 1933 influenced not only home supplies but home demand. Hot, dry weather ruled until late in the autumn and, in consequence, consumer-demand was transferred to an unusual extent from the heavier meat to mutton and lamb. It may be assumed that this had the effect of depressing beef prices and raising prices of mutton and lamb.

The other factor referred to was the difficulty of administration inherent in the initial stages of such a gigantic experiment in supply regulation. An example of the administrative difficulties that had to be met is provided by the case of frozen beef cuts and offals. The programme of reductions of foreign frozen beef arranged at Ottawa only dealt with foreign frozen carcase and boned beef, that is to say, it did not cover edible offals derived from chilled and frozen carcasses. The assumption, no doubt, was that the regulation of carcase and boned meat would automatically secure the regulation of edible offals. In the past, however, shippers had entered small quantities of frozen beef cuts, as well as all their offal shipments under the Customs classification of "other descriptions" of frozen beef, and this practice continued in 1933. But in the first quarter of that year there was not only an increase in imports in the category of "other descriptions" of frozen beef from certain foreign countries, but a greatly increased proportion of these imports consisted of beef cuts and not offal. Imports from foreign countries in the first quarter of 1933 of frozen beef of all kinds (including "other descriptions") exceeded by 48,673 cwt. the quantities imported in the corresponding quarter of 1932, to which period, in accordance with the Ottawa Agreements, a reduction of 10 per cent. on carcase and boned beef should have applied. Of this excess, consignments of "other descriptions" accounted for 46,445 cwt.

It was obviously necessary to take steps to deal with the situation, and in consequence it was arranged that as from 1st June, 1933, beef cuts should not be classified with "other descriptions," but with carcase and boned beef, and should form part of the shipments subject to progressive reduction under the Ottawa programme. Thereafter, the classification "other descriptions" should properly only cover edible offal. An agreement was also made with the importing interests whereby shipments of edible offals under the category "other descriptions" would be kept in approximately the same relation to total shipments of carcase and boned meat as in the Ottawa standard year. Owing to the uncertainty as to the exact classification of various parts of carcasses as offal or as boned meat, it is extremely difficult to arrive at an indisputable analysis of frozen meat imports, and we welcome the action recently announced by the Minister of

Agriculture with the object of readjusting the proportion of boneless meat imported.

21. Failure to adhere to supply arrangements.—We believe that, after 17 months' experience, it should be possible, as it has been shown to be necessary, to tighten up this policy—in fact, to regulate.

It is the expressed intention of the Government to regulate supplies in the interests of all suppliers of the United Kingdom market. We think it right that the Government should give every consideration to the aspirations and difficulties of supplying countries, and should make every effort to secure and retain their willing co-operation, but we maintain that, once a reasonable supply arrangement has been made or imposed, there should be strict adherence to it, and we are not satisfied that this has always been the case in the past year.

The following examples show what we have in mind:—

(i) In the three months July to September, 1933, the imports of frozen carcass and boned beef from foreign countries amounted to 83,338 cwt., a figure which was 8,091 cwt., or 10·75 per cent. greater than the maximum permitted under the Ottawa programme.

(ii) In the three months October to December, 1933, arrivals of chilled beef from South America were nearly 30,000 cwt. or 1·6 per cent. greater than should have been imported (even allowing for the agreed tolerance) under the voluntary arrangement whereby chilled beef imports from this source were not to exceed 85 per cent. of the quantity imported during the corresponding quarter of the Ottawa year.

(iii) In 1933, the imports of frozen beef from New Zealand were 706,750 cwt., a figure which was 266,750 cwt. or over 60 per cent. greater than the formal estimate contained in the Ottawa Agreements.

The above figures are taken from the Customs statistics. We understand that in certain cases the importers have been unable to reconcile their own records of imports with the official figures.

We do not think that any important deviations should be permitted. It is in accord with the spirit of the policy to permit oversea suppliers themselves to regulate their shipments, though we consider that, equally in the interests of all who depend upon the United Kingdom market, the Government should introduce, if it is not already in existence, a system by which the various categories of imports can be effectively checked. If, however, imports from any country fail to show reasonable adherence to the quantitative and other limits agreed upon (as in some cases we have shown that they have failed to do in 1933), then we recommend that the Government should not hesitate to employ the powers of Section I of the Agricultural Marketing Act, 1933, in substitution for

voluntary arrangements, and that, where statutory control already exists, they should, if necessary, introduce a stricter system of administration.

C. THE FUTURE OF SUPPLY REGULATION.

22. Need for regulation of all meat imports.—We have watched the development of the Government's policy of the regulation of meat supplies. In turn, there have been or are being brought under control, imports of bacon, frozen (carcase, boned and boneless) meat, chilled meat, live cattle and canned meat. We recognise the need to tread warily in this unknown country in which a false step might do serious damage to important established industries, might gravely inconvenience consumers and might only result in injuring the meat market to the detriment of the home producer whom it is desired to help.

We have found no practicable substitute for the policy of supply regulation capable of immediate application. Our enquiries have, however, left us in no doubt that it is necessary for the success of this policy that *all* forms of meat supplies should be regulated. In a later part of this report we make certain recommendations regarding the regulation of home-produced supplies.

As regards imports, we consider that it is equally necessary to control all imports, whether in the form of fat animals, or of fresh, chilled, frozen or canned meat. We, therefore, suggest that the Government should lose no time in opening discussions with the Dominions whose shipments, if unregulated, are capable at any time of dislocating the market. We recognise that, in accordance with the Ottawa Agreements, Australian and New Zealand supplies have a free run of our markets up to the end of June of this year, but we hope that a better appreciation of the situation, and a recognition of the difficulties of the home producer, will convince shippers from these Dominions of the unwisdom of over-supplying a recovering market.

23. Administration to be tightened up.—We have already recommended that the machinery of regulation should be tightened up and, in particular, that a system should be introduced to maintain a stricter verification of the volume of imports. Apart from this, we recommend no major change in administration.

24. Releases from cold store.—It has been put to us that it is not sufficient to regulate imports, but that releases from cold store in this country should also be controlled. We have given some thought to this point and advise that it should not be attempted. About 50 per cent. of the total supplies of beef, veal, mutton and lamb are home-killed, 25 per cent. are in the form of chilled meat and 2½ per cent. in the form of canned meat; none of these supplies is held in cold store. As

regards the balance of 22½ per cent., which consists of frozen meat, we believe that an adequate measure of control can be maintained through the regulation of importation, and that it would be impracticable, even if it were necessary, to control releases from cold store, without subjecting to control the complete wholesale and retail distributive machines.

25. **Marking of imported meat.**—We desire to support the recommendation of the Standing Committee under the Merchandise Marks Act, 1926,* with regard to the marking of imported meat.

26. **Regulation of home-produced supplies.**—Effective quantitative regulation of supplies involves the regulation of all supplies on the market. We have, therefore, considered in what way home supplies may best be regulated.

The contract principle, as employed for milk and for bacon pigs, has obvious advantages, but for a number of reasons we do not think it can be applied to live stock, other than bacon pigs. Cattle, for example, are slow to mature; it is difficult to anticipate the age at which a beast will be slaughtered, and the fulfilment of a contract would frequently be rendered difficult by disease or crop conditions. Similarly, the number of sheep a particular producer can fatten will depend on the conditions of his feed crops and grass, which cannot be foreseen. Thus, having regard to the known risks of losses and irregularities in production due to disease and weather conditions, a system embodying forward contracts for stated quantities of fat stock must of necessity require that there shall be a reserve of uncontracted production from which contract deficiencies can be made good, and also an outlet for animals surplus to contract commitments. But there is only one outlet for fat stock, whether produced in fulfilment of contracts or not—that is to say, the dead meat market; and the existence of these surplus supplies, which can only be absorbed by the dead meat market, would, therefore, seem to defeat the whole object of a contract system for fat stock.

It is also improbable that butchers and other buyers would be willing to contract to buy stock long ahead. This last difficulty would be avoided if it were possible for the producer to give a supply-guarantee to the Marketing Board, but the fundamental difficulty of the individual producer's inability to enter into a firm long-period contract covering the whole of his output would remain insuperable.

It would generally be possible for a producer to guarantee with reasonable accuracy his output of fat stock for, say, a maximum period of three months ahead, but that period would be far too short to permit efficient import regulation; we have found no satisfactory method whereby producers can individually guarantee their output for a longer period.

* Cmd. 4470.

Our enquiries have, however, shown us conclusively that the changes from year to year in the output of the home live stock industry are small. Excluding the abnormal years of and immediately following the War, the average percentage changes from year to year in the output of the live stock industry in Great Britain since 1900 have been :—

Beef and veal	...	...	...	...	2·2 per cent.
Mutton and lamb	...	...	...	...	4·5 per cent.
Beef, veal, mutton and lamb	...	...	...	...	2·0 per cent.*

There is thus a natural tendency to stability of home-produced supplies from year to year. This tendency does not, however, exclude the possibility of important changes over longer periods; for example, a general increase in live stock prices, and consequently in confidence in the future of the live stock industry, might well start a movement from dairying to stock feeding. In such circumstances, however, the slow rate of maturity of fat cattle and sheep will prohibit a rapid change in output or one which cannot be foreseen with the help of an adequate system of production statistics. We, therefore, conclude that strict regulation of the home output of the live stock industry is unnecessary; what is required is a complete and continual knowledge of production, which will permit any unusual changes in the home output to be foreseen in good time.

There is thus one notable difference between the method of regulating the home supply of bacon which is now in operation and the system which we recommend for other live stock. In the case of bacon and bacon pigs, the maximum output of home producers is now limited, but in the case of other kinds of live stock we propose no such limit. There were certain considerations which made the bacon system necessary and possible, namely, the speed with which the pig population can multiply, the short period pigs require to reach maturity and the existence of a surplus outlet in the form of the pork market. These considerations do not apply to cattle and sheep. Nevertheless we think it necessary that the volume of total supplies of butchers' meat, both home-produced and imported, should be regulated.

We recommend, therefore, that this regulation of total supplies should operate in the following way. It should be the duty of the Board to keep the actual and probable future output of home producers under continual watch by a system of half-yearly census (taken in June and December), quarterly forecasts of sales for slaughter and slaughtering returns and by the collection of information from other sources (paragraphs 37 and 71). Guided by this information and at regular intervals, instead of on the basis of

* The variation in the case of beef, veal, mutton and lamb as a group is smaller than the variation in the case of individual classes of meat since variations as between classes tend to cancel one another out.

contracts, periodic adjustments should be made to the volume of permitted imports.

These recommendations on this matter have already been put to a practical test. Owing to the uncertainty as to the extent of sales of fat stock in the autumn of 1933 and, therefore, as to the probable offerings in the first and second quarters of 1934, the Ministry of Agriculture took a live stock census* on 4th December and also asked farmers to forecast their probable sales for slaughter. The response made by farmers was better than could reasonably have been expected, and the information so obtained has been of the greatest value. It is greatly to be hoped that the Ministry will continue this work until it can be taken over by the Marketing Board which we hope will be set up as a result of our recommendations. In fact, if the work is not continued, we foresee the greatest difficulty in the regulation of meat supplies in 1934.

27. Regulation of total supplies : *Quantitative Limit*.—Within broad limits, meat supplies are interchangeable. At certain seasons of the year, certain types of meat are in bigger supply or in bigger demand. Over longer periods, there may be permanent trends of change, either in supply or in demand. We find it difficult, therefore, to recommend a figure at which supplies of the different classes of meat should be maintained. The improved market intelligence system which we suggest will considerably help the Government to arrive at a decision on this point.

28. *Supply regulation : Procedure*.—Assuming that the Government have determined in any year the quantitative level at which meat supplies are to be maintained, we visualise that on the information provided by the previous census, quarterly forecast, slaughtering returns and crop reports, it will be possible, well before the close of each year, to inform exporting countries as to the rate of importation which will be permitted in the following year, subject to a variation of x per cent. up or down in the third and fourth quarters; as regards the third quarter the final figures should be reached, say, in April, and the final figures for the fourth quarter will not be settled until after the results of the June census are known. There might be difficulty in this procedure if it were anticipated that the variation to be effected would be substantial, but judging from past experience and having regard to the greater adequacy of the information which will be at the service of the Government, we think that the variation should seldom exceed 5 per cent. in any quarter and would generally be considerably less.

* Table XII summarises the results of the census of 4th June and 4th December, 1933, and compares the variations in live stock population between these two dates with those which occurred between the census taken on 4th June, 1929, and 11th January, 1930, the date of the previous general winter census.

29. *Seasonal variations in supply regulation.*—There remains the question of seasonality. We have already pointed out that natural production conditions result in a heavy supply of home-fed fat stock in the autumn and early winter. This is not a fact which can be held against the home producer as a sign of disorderly production or marketing; it is merely that the home producer is taking advantage of one of the country's greatest agricultural assets, namely, first-class fattening pastures. The grasslands of the country are capable of improvement which might lead to a considerable net increase in the agricultural output. Apart from the relatively small expenditure on imported fertilisers, this increase should be at little additional cost. It is true that the stock sold off the grass in the late autumn is too frequently unfinished but we attribute this to the fact that prices ruling in the autumn have proved an inadequate incentive to all but the best farmers on the best land to finish their stock properly. Whereas a general raising of the price level will once more permit profitable winter feeding of stock, something more is necessary in the autumn when prices of all meat, whether home-produced or imported, or whether mutton or beef, are dominated by supplies of home-fed cattle. We regard it as essential that the greatest care should be taken in the regulation of imports during the last quarter of the year so that not only will a greater demand for home-fed cattle be created, which will make it worth while for the home farmer persistently to improve the quality of the meat which he offers in this period, but also so that the fattening of stall-fed cattle during the winter months will not be reduced by the elimination of the premium which he normally receives over autumn prices. If, however, the Government creates this opportunity for the grazier, it will be the duty of the Marketing Board to make every effort to secure that proper use is made of it.

30. *Supplementary measures.*—In drawing up our scheme in accordance with the policy of supply regulation, we have given considerable thought to supplementary or alternative measures, even though this country may momentarily be debarred by its treaty obligations from employing them. In the case of beef, mutton and lamb the problem is the more acute, because we believe that the production costs of oversea producers are at present at a much lower level than those of the home producer, however efficient. We make no attempt to give a figure to represent the fair average costs of home producers because we find that the wide variation in the farming systems of Great Britain makes it impossible at the present time to give a figure which would be of general use and validity. Such investigations as we have made have left us in no doubt that there is a considerable though immeasurable gap between the costs of home producers and their oversea competitors. The existence of this gap greatly complicates the consideration of the future regulation of meat supplies.

If, however, supply regulation, within the present limits of practicability and having regard to the requirements of consumers as to both volume and price, failed to restore prices of home-produced meat to a reasonable level, it would become necessary to consider supplementary methods of helping the home producer, of which the four most frequently mentioned are an import duty, a levy on the lines of the Wheat Act, an import board and a direct subsidy. Of these four, the one which we would commend to the first consideration of the Government is the levy plan, although this may not be immediately practicable owing to treaty arrangements. A levy, whatever may be its effect on wholesale prices, would provide a fund which could automatically be applied to the relief of the home producer. It is agreed that it would be an abuse of supply regulation so to restrict supplies for the purpose of increasing prices in the interest of home producers as to deprive the nation of a sufficiency of butchers' meat.

PART III.—LIVE STOCK MARKETING SCHEME.

Statement of some important recommendations.

31. Before describing in any detail our plan of marketing organisation and the scheme, under the Agricultural Marketing Acts, by which effect could be given to the plan, it is desirable to refer to a few recommendations which we believe to be of importance inasmuch as they provide the foundations upon which the structure of the plan has been built.

32. **A Live Stock Scheme.**—We were directed to prepare a scheme for regulating the marketing of fat stock but we have found it necessary to depart from those instructions and to prepare a scheme covering all cattle, sheep and pigs regardless of whether they are fat or store.

The major marketing problems of fat and store stock, other than those relating to slaughtering arrangements and to certain aspects of the supply situation, are similar. The general lack of marketing organisation, the excessive numbers of markets, auctioneers and dealers, the inefficient use of methods of sale, which are themselves of varying degrees of utility, the lack of market intelligence and of knowledge of supplies and prices, both past and prospective, the blind movements of stock in search of a reasonable market, the fluctuation of supplies at markets, the credit problem—all these problems are common to all forms of live stock, except bacon pigs, and are unfavourable to farmers' interests. The store stock trade needs marketing organisation as much as the fat stock trade and it

would be a pity if the opportunity were missed of bringing the whole live stock industry into one organisation. Moreover, the lack of knowledge of actual and prospective supplies and of prices applies equally to store as to fat stock and we regard it as essential, both for the purposes of supply regulation and for the sake of marketing efficiency, that any scheme should provide for obtaining this knowledge.

But we regard it not only as undesirable but as impracticable to restrict a scheme to fat stock for the reason that we have found it impossible to define what is fat stock. For example, butchers in the Lancashire industrial centres would without hesitation buy for slaughter a bullock which in Norfolk would be regarded as a strong store and, as such, would be bought for further feeding. A cow which was classified as fat in some areas would almost certainly require further feeding before butchers would buy it in others. A pork pig of the right age and weight for the Smithfield trade would probably need two months' further feeding before it suited the Midland trade. Thus the same animal would be classified either as fat or as store, according to the part of the country for which it was bought.

It has been suggested that fat stock could be defined as "stock intended for slaughter," but we can see no solution in this direction. Many a farmer, selling his cattle in the autumn, has no idea whether they have been bought for slaughter or for further feeding. Similarly, in the case of sales of store lambs from hill farms in the autumn, an uncertain proportion is usually drafted from each lot for immediate slaughter. Perhaps in some cases a farmer may be a bad judge of the degree of finish required by butchers: frequently, however, the destination of stock bought at a market depends on the current course of supply and demand in the meat market: there is, in fact, the class of stock in a border-line three-quarter-fat condition which will be bought for slaughter or for further feeding according to the requirements at the moment of the meat market. If the regulated product of a scheme was "fat stock," the sellers of these border-line animals would never know whether or not they were selling the regulated product.

It will make little difference to the size of the register of producers, who are participants in the scheme, whether the product be fat stock or live stock. There are few stock farmers, even in areas where store raising or dairying are most general, who do not occasionally and even regularly sell some stock which is immediately slaughtered.

In recommending, as we do, that there shall be a scheme covering all live stock, we cannot see that there is any practicable alternative. (We do, however, recommend the exemption from the scheme of small producers and from the marketing provisions of certain identifiable classes of stock (paragraphs 63 and 64).

33. **Guaranteed or minimum prices.**—It has been pressed upon us by a number of witnesses that no scheme would be acceptable to producers which did not provide for the fixing of "minimum" or "upset"* prices. We have given considerable thought to this suggestion, which admittedly raises a question of the greatest importance, and record our conviction that any scheme seeking to impose minimum prices would be doomed to early failure.

Great Britain produces † 46 per cent. of her beef and veal supplies, 43 per cent. of her mutton and lamb and, probably, about 80 per cent. of her pork supplies. Home producers have not, and are not likely to have, a monopoly of the meat market as dairy farmers have of the liquid milk market or as potato growers might well obtain in the market for main-crop potatoes. Secondly, there comes a stage in the production of fat stock when the longer an animal is kept, the more money will be lost on it. Fat stock must be sold when ready for slaughter and has no economic outlet other than the fresh meat market.

It follows from these two premises that the function of a live stock marketing scheme must be to facilitate sales of home-produced fat stock and meat in competition with meat imports, and it seems to us to be incontrovertible that the proposal to fix minimum prices must place an obstacle in the way of sales.

In a free market (a market on which total supplies are regulated is still a free internal market) buyers are prepared to pay a price determined by the quantities available; that is to say, they will quote prices at which they will take all supplies offered, if of reasonable quality. If "upset" prices are to be effective in their sole object, namely, to raise prices, it seems to us to be inevitable that they will thereby reduce demand. The effects of the low prices ruling during the past year have been serious; they would have been far more serious if any proportion of stock had been *unsaleable*. It has been suggested that this difficulty should be met by compelling the Marketing Board to purchase all unsold stock at the "upset" prices for resale on the dead meat market; but the Board would have to resell for what the stock would fetch and would almost inevitably incur substantial losses in so doing, in addition to double selling expenses. Except for a few local buyers for slaughter in country districts, who are frequently willing to-day to pay a premium for the stock they want, it does not seem to us to be reasonable to expect butchers to pay "fixed" prices for live stock when they know that there will be a free market for the carcasses of all unsold stock. It has been argued that the system of fixed prices operated successfully during the War. Then,

* See paras. IV (e) and (f) and X of "Scheme for the better organisation of the Marketing of Fat Stock and Dead Meat in England and Wales," prepared by the National Farmers' Union early in 1932. Published in "The N.F.U. Record," June, 1932.

† On basis of average 1927-31—see Table VI.

however, the country was on a starvation basis; there was no question of a surplus; butchers and the public were only too thankful to take what they could get at any price. Moreover, price control covered all meat, home-produced and imported, and virtually covered all foodstuffs. The public to-day are unusually appreciative of the difficulties with which farmers are contending, but their will to help would stop short of a reversion to war conditions which, in our view, alone could make possible the fixation of fat stock prices.

We think that the importance which some witnesses have attached to the provision of machinery to secure minimum prices is no more than a reflection of their disappointment with the course of prices during the last two years. We agree that prices must be improved, but we are convinced that they cannot be improved by an arbitrary attempt to control the prices of one half of our meat supplies. This price increase will in the main have to be obtained by supply regulation, with or without supplementary measures. It will then be the function of the marketing scheme to equip the Board with the necessary power to secure that the producer gets the benefit of this improved price and we suggest that this cannot be done by an attempt at price fixing but can only be done by studying the finer points of marketing efficiency, by encouraging those channels of sale which are shown to give the best results, and by close co-operation with other sections of the industry where waste may also occur.

34. The case against the principle of "upset" prices appears so unanswerable that it is unnecessary to comment at length upon any administrative difficulties. A price guarantee for fat stock would, however, involve the segregation of fat stock and store stock, which we believe to be impracticable, and the classification of stock into quality grades which we consider would give rise to a number of serious administrative difficulties and would also make it necessary to prohibit all sales on the farm where such grading would be impracticable.

35. Quantitative regulation of home-produced supplies.—We have had to consider two forms of the quantitative regulation of the sales of home-produced live stock. As part of the Government's policy of regulating the total supplies on the market, it is necessary to take note of the total home output. Our recommendations on this subject are contained in paragraph 26.

There is also the question of the regulation of the individual producer's rate of marketing. On this difficult question we desire to state our general view. We think that the symptoms of unregulated marketing are prevalent to-day in the form of local market surpluses. These are symptoms of an inefficient system which needs to be remedied. It may prove necessary for the Board to exercise direct control over the individual producer's

rate of marketing but we think that it will not generally be so and even that the need for this direct regulation will only arise exceptionally, if ever. Crop and weather conditions undoubtedly affect the rate of weekly marketings and weather conditions affect consumers' demand, but the prime cause of supply irregularities at markets we believe to be the speculative activities of dealers and farmers which are encouraged, if not caused, by the market system. The repitching of stock, perhaps two or three times, between farm and slaughterhouse has been described to us as a balancing operation but it is one which would not be necessary if supplies were not uneven, owing largely to the temptation to producers to try market after market in a perpetual, but seldom successful, search for the best returns.

If, therefore, the system could be improved and the temptation removed, then the cause of supply fluctuation might also be removed and, with it, the need for the strict regulation of the quantities marketed weekly.

We desire to avoid anything which will interrupt the smooth orderly flow of stock from farm to slaughter and we are apprehensive of the consequences of an arbitrary control of the rate of marketing of fat stock. When, therefore, our proposals for tightening up the market system are examined (paragraph 42 *et seq.*) it should be remembered that, in our view, some such reform of the system is the alternative to a more drastic interference with the freedom of producers to select the place and time of sale.

Circumstances may arise which make necessary some direct regulation of the rate of sale. We have, therefore, included the necessary powers in the Scheme and have recommended methods of effecting this regulation (paragraph 52). Alternatively, it could be left to the Government, if the need arose, to regulate the rate of marketing by an Order under Sections 2 and 11 of the Agricultural Marketing Act, 1933. We express no preference in principle for either method, but observe that the latter method would permit emergency regulation to be undertaken without the Scheme having to contain provisions which would be alarming if they were put to general use.

An exception to our general view is provided by the case of pork pigs (paragraph 107).

36. Market Intelligence.—In Part IV we devote considerable space to our proposals for the provision and maintenance by the Board of a market intelligence service: this is to be a service for collecting, analysing and disseminating knowledge. We do not exaggerate when we say that this is the element, in our plan for reorganising the marketing machine, to which we attach the greatest importance. We recognise that no such service as we recommend could be maintained without the expenditure annually of a large sum of money, but we hope that the Board will pursue

economy in any direction rather than this: we believe that in a few years' time the service will amply repay its cost. We allude to this service at this point because one or two features of our main proposals, of the necessity for which some producers may be doubtful, are primarily or partly designed to facilitate the collection and use of marketing intelligence.

37. Census and forecasts : Forms.—We have explained in paragraphs 26 and 28 the function of the census and forecast in the regulation of supplies; they also will form an important part of the Board's market intelligence machine. It is desirable at this point to explain our proposals in greater detail.

A draft form of census and forecast is appended on page 127 (Appendix B). The census form has been kept as simple as is consistent with effectiveness, the necessity for which the Board should at all times bear in mind. It will be of vital importance to the individual as well as to the Board that the greatest care should be used to complete the form accurately, for not only do we suggest that the individual's voting capacity and liability to contribute to the Board's funds should be proportionate to the number of stock shown in the census form, but the administration of import regulation will be virtually based upon the aggregate returns.

As is the case with the statutory Annual Agricultural Returns made on 4th June, separate forms would be sent to a producer in respect of each holding. When holdings owned by a producer are in different voting districts, the issue of separate forms in respect of each holding will enable the producer's district voting power to be calculated without difficulty.

In a note on the *census* form it is suggested that a producer should make a return of all stock being fed on his farm even though not owned by him. This seems to be the only way of avoiding administrative complications, but it should be noted that the producer making the return will be liable for the levy imposed by the Board.

The classes of stock in the form are rather more elaborate than in the form used by the Ministry of Agriculture for the statutory 4th June returns. This is noticeable in the case of "other cattle," but the proposed age groups with intervals of six months between them will have an obvious significance when it is remembered that the census will be taken every six months.

It will be seen that the *forecast* form only applies to cattle and pigs. Sheep are omitted because it is not thought that any reliable individual forecast is possible. It is probable that in the course of a few years the information provided by the census will enable the Board to estimate fairly closely the seasonal rate at which the lamb crop is killed.

In the case of cattle, a producer will continually be asked to forecast his production of fat stock for two quarters ahead. Thus, at the time of the June census he will be asked to make a forecast

in respect of the periods 1st June to 31st August and 1st September to 30th November. Whereas his forecast for the first of these periods should be accurate within a small margin of error, his forecast for the second period must be less reliable; nevertheless it should provide a very useful indication of probable slaughterings. But when the next forecast is made, i.e., on 4th September, it will again be for two periods, namely 1st September to 30th November and 1st December to 28th February. The individual forecasts for the September-November period can now be made with more accuracy and will at the same time serve as a check on the earlier forecast for the same period.

In the case of pigs, a forecast is only asked for the ensuing three months.

Marketing Efficiency : The Scheme.

38. Existing system capable of improvement.—The farmer has as his disposal a number of alternative methods of selling his stock, of which the following are in most general use :—

- (a) Sale at market by auction, by the head or by live weight.
- (b) Sale at market by private treaty, by the head or by live weight.
- (c) Sale on the farm by private treaty, by the head.
- (d) Sale by dead weight and grade under the Ministry of Agriculture's Scheme.
- (e) Sale by dead weight on commission.
- (f) Sale (of sheep) by dead weight to or through dealer-slaughtermen.

Some of these alternatives we believe to be capable of giving better results than others and to be deserving of special encouragement, but each has its advantages. Therefore, our aim is not to build a new market structure, but to improve the existing one.

We believe that one weakness of the existing system lies in the fact that competition for supplies is dispersed over too many places of sale, e.g., over too many farms, too many markets, too many auctioneers. Thus, too many live stock selling centres are not "real and effective" markets, and all selling centres suffer from inadequate market intelligence. Our policy is to secure that stock should be sold, if possible,

- (1) in a "real" market (i.e., in a place where competition of buyers for supplies determines a fair market price); or
- (2) under conditions which offer the vendor a good prospect of obtaining the real market price if he negotiates a sale by private treaty outside a market.

We suggest the retention of the main existing methods of sale believing that experience will show the producer and his Board which method or methods most deserve encouragement. But, in

order that each shall operate under conditions of greater efficiency, which shall permit of a just comparison of results, we make three major recommendations, namely, the limitation of the number of selling points, the codification of trade practices, and the establishment of an efficient market intelligence service.

39. *Sales at auction.*—We believe that the auction system can be made to work more efficiently if certain defects are removed, and if opportunity is given to producers, acting corporately and in co-operation with other interests, to concentrate their sales in selected markets. This recommendation should not be interpreted as meaning that we desire to see the closing of markets on a large scale. Conditions vary in different parts of the country; in some parts it will be found that the location and size of markets correspond closely with the requirements of producers, but in others we are satisfied that the interests of the great majority of persons affected and the public interest would best be served by the rationalisation of market facilities even if hardship is thereby occasioned to individuals. We refer later to some of the considerations which should guide this plan of rationalisation (paragraph 45).

40. *Sales to butchers.*—Sales of fat stock to the wholesale meat markets constitute another important channel of sale in the case of cattle, sheep and pigs. Where, however, such sales are on a commission basis they involve the stock being slaughtered before the price is fixed, which in itself is unsatisfactory. Sales by this method are also too often open to objection, partly because many commission agents on wholesale meat markets are also trading as wholesale butchers and tend to neglect commission sales in favour of their own trading interests, and partly because farmers' lots tend to be small and irregular. In 1930, however, the Ministry of Agriculture introduced a system, in conjunction with its National Mark Beef Scheme, whereby wholesale butchers are enabled to quote prices, on a dead weight basis, according to the National Mark Grade in which the beasts kill out. The farmer is thus in a position to accept or reject a quotation before the animal leaves his farm and knows that the beast will be dressed and graded on a known standard and that the price he receives for the animal is the full amount due for the meat he has produced. Since June, 1933, the scheme has been successfully extended—by way of an experiment—to fat sheep and fat lambs,* and its extension to pigs is being explored. We consider that this scheme† represents a most economical method of sale and is one which the Board should encourage. We make further reference to the scheme in paragraphs 98–101.

41. *Sales on the farm.*—The value of the system of sale by private treaty on the farm is most difficult to assess. There are definite

* See Journal of the Ministry of Agriculture, December, 1933.

† Described in Marketing Leaflets Nos. 13, 27 and 46, issued by the Ministry of Agriculture and Fisheries.

advantages from the producers' point of view in farmer to farmer sales. The stock is transferred direct from one farm to another without the journey to, and handling at, market. The risks of disease infection and transmission are reduced and the purchaser is able to make more detailed enquiries and observations as to the quality and breeding of the stock he proposes to buy. Furthermore, it may well be that direct sales of fat stock on the farm to local butchers constitute a cheap and useful method of sale, provided that the farmer has a standard by which he can tell whether he is getting the full market value for his stock. At the present time the average farmer tends to be in a weak bargaining position in the sale of his fat stock on the farm, since he usually sells but few animals in a year and consequently has little knowledge of the weight of meat they will produce, whereas the fat stock buyer is an expert judge of the weight at which stock will kill out since this is such an important factor in his business.

We believe, however, that the bulk of the private treaty sales on farms is made to live stock dealers. There are two types of dealers engaged in the live stock trade, both of whom may buy in the market as well as on the farm. The types are usually well-known, but are not easily defined. The one lives by picking up animals cheap for a quick resale in the same neighbourhood; the other, the "long distance" dealer, carries on a highly-specialised trade in buying up mixed lots of stores in the breeding areas and transferring them in classified lots to the fattening areas, where they are required, or in assembling mixed lots of fat animals and sorting them out to suit the varied requirements of butchers in distant consuming areas. The "long distance" dealer performs a useful service, whereas this cannot always be said of the other type, the "higgler," and his purchases on the farm, in particular, should, in our view, be discouraged.

Although we appreciate the advantages of sales direct from farmer to farmer, to local butchers and to "long distance" dealers, we are impressed with the fact that the system of sale by private treaty on the farm flourishes in areas where the auction system is the least developed. In our view, it is one of the factors militating against the efficient operation of auction sales. The private sale of stock on farms robs the local market of supplies and depresses market prices; yet it is on these depressed prices that the farmer has to depend in judging whether the price offered is a fair one. The system of selling on the farm may be the easiest, but in the long run it may be the most expensive method of selling stock, because its costs to the farmer do not take the form of charges which can be compared with those of other systems.

We suggest that private treaty sales on farms from farmer to *bona-fide* farmer or local butcher should be left unrestricted, but that such sales from farmer to dealer should be closely regulated by the Board.

42. *Bird's-eye view of scheme.*—Briefly under our proposals a farmer could sell his live stock to :—

to
sales

- (a) other farmers,
- (b) approved dealers,
- (c) approved butchers,*
- (d) the Board,

either

- (e) direct or
- (f) through (i) approved auctioneers,
(ii) approved dead meat commission salesmen,

on or at

sales

- (g) specified auction markets (by the head or by live weight),
- (h) slaughterhouses or dead meat markets (by dead weight)†
- (j) farm premises (by the head)‡
- (k) specially approved marketing centres (e.g., agricultural shows, old established fairs, private treaty markets, etc.),

ms

only on conditions of sale (e.g., supply of information, standardisation of trade practices) approved by the Board,

ms

but bacon pigs and certain other classes of stock, emergency sales‡ (to be defined by the Board) and certain classes of small producers might be exempted from the above marketing provisions.

43. *Relation of producers' scheme to other interests.*—The Agricultural Marketing Act permits the regulation of marketing by producers, but does not permit the regulation of marketing by persons who are not producers, but who may be intermediaries between the farmer and the consumer. So far as practicable and necessary we are proposing that the actions of producers should be regulated, but it is clear to us that no effective reorganisation of the marketing of live stock can stop short at the regulation of the producers' functions. We have, therefore, sought means of bringing other interests within the purview of the scheme, and are relying partly on the results of negotiations, inspired by a common interest in an efficient marketing system, and partly on the powers in the Agricultural Marketing Act which enable a board to determine the persons to or through whom the regulated product may be sold. It is, therefore, fundamental to our proposals that all auctioneers, dealers and butchers who buy live stock shall be on the appropriate list of approved persons.

* The term "butcher" means a person who slaughters animals for food.

† Sales to butchers are frequently negotiated on the farm by the head. When weighing facilities at the slaughterhouse permit, it would be an advantage if such sales were made on a dead weight basis, or, at least, if they were so recorded. In this way a farmer would be in a better position to judge whether he was getting the full value of his stock.

‡ These should be strictly limited to real emergencies (e.g., accidents to animals) in which immediate action is essential.

We believe that our subsequent recommendations regarding the conditions of approval of certain classes of individuals forming part of the live stock marketing machine will be as much in the real interests of those classes as of the live stock producers of the country.

Sales at Auction.

44. The object of the following proposals is to increase the usefulness of the auction system, and to remedy four of its weaknesses which we believe to be :—

- (i) the existence of some redundant markets,
- (ii) the operation of two or more sale-rings for the same class of stock at the same time and place,
- (iii) the extreme variability from week to week in the turnover of individual markets.
- (iv) the lack of information as to supplies and prices.

45. **Approval of auction centres.**—The Board should maintain a register of auction markets at which approved live stock auctioneers would be permitted to operate; sales by auction of registered producers' live stock otherwise than through such approved auctioneers would be prohibited, except by special licence. Special licences would be given, for example, to annual fat stock shows or in the case of farm dispersal sales. In considering whether producers should sell by auction through an auctioneer operating at a specified market, the Board would have regard to the facilities of the market (e.g., its site, layout and accommodation, transport facilities, etc.), the volume and area of its supply and the proximity and relative efficiency of neighbouring markets; in certain cases the Board might need to negotiate with the market authority regarding improvements. Before approving an auctioneer the Board would satisfy itself as to his credentials and as to the suitability of the place at which he proposed to operate.

Although our proposals are necessarily made in the interests of producers, we believe that, if they succeed in increasing and making more regular the turnover of markets, they will add considerably to the security and prestige of the auctioneering profession. We appreciate that under present-day conditions it is frequently necessary for an auctioneer to open or to maintain one or more subsidiary markets in his area in order to prevent its invasion by competitors and it is therefore useless to expect auctioneers, however sympathetic, to close down existing superfluous market centres, unless they can be sure that the result will be to increase their sales at the bigger or better markets that remain and that others will not be able to re-open the auctions which they themselves have discontinued. Our plan should give them that security.

In arriving at decisions as to the approval of individuals and the selection of suitable markets the Board should, therefore, act in

close consultation with the auctioneers' professional organisations ; indeed we think that in practice individuals might generally be nominated by those organisations for approval and that the rationalisation of market facilities should be based on a co-ordinated plan prepared by auctioneers, in consultation with the Board. On several occasions we have discussed this subject with representatives of the auctioneers' national organisations and have reason to believe that such a plan is, in fact, under consideration by them.

46. Conditions of approval of auctioneers.—The Board would, again in consultation with representatives of the auctioneering profession, draw up standardised conditions of approval of auctioneers which might include *inter alia*, an undertaking by the auctioneer :—

(a) to abide by the standardised selling charges and practices agreed between the Board and the profession ;

(b) only to hold auction sales at places, on dates and at times approved by the Board ;

(c) only to sell live stock of the regulated classes which had previously been entered and accepted for sale in accordance with the Board's regulations ;

(d) to verify that the stock sent in for sale is of the same description as that notified and to deal with cases of mis-description in accordance with the Board's instructions ;

(e) only to sell (as agent for registered producers) to producers, to approved dealers, to approved butchers or to the Board ;

(f) to furnish the Board with information as to all sales of live stock ; and

(g) to co-operate with the Board in securing the smooth running of the scheme.

We think it would facilitate negotiations and inspire confidence if the Board made use of the powers of Section 13 of the Agricultural Marketing Act, 1933, which would enable it to bring an impartial element into its consultation with auctioneers.

47. Producers' selected auction markets.—To remove one of the causes of the extreme variability of turnover of individual markets from week to week and generally to facilitate the efficient organisation of the individual market, every registered producer should be required to select the market at which he desired his various classes of stock to be auctioned. He should be allowed to choose different auction markets for the various main classes of stock ; but, having chosen, he should not be permitted to sell his stock at any other auction markets except after giving due notice (say, three months) of his desire to change his selection. Producers having farms in different parts of the country should be entitled to a separate choice for each district, and the Board would have to

exercise discretion in the case of producers who are producing on a very large scale in one part of the country.

48. **Normal entries for sale by auction.**—With a view to minimising week to week variations in supplies and to facilitate the regulation of the rate of marketing in case of emergency, every registered producer proposing to sell live stock by auction should be required to notify his intention to the local office or agent of the Board at least seven days before the market day, and no stock should be permitted to be sold unless the entry had been accepted by the Board—entry being regarded as accepted unless a notification to the contrary was received within three days. (In Appendix C we suggest a form of notification.)

If provision is made for emergency sales, we consider that farmers can give seven days' notice without inconvenience. Dealers whose business it is to transfer stock over considerable distances might sometimes experience difficulty in giving such notice, but we think it just as desirable that farmers should have advance knowledge of the entry of store stock at their local market as that butchers and other buyers on their behalf should have advance knowledge of the entry of fat stock.

Some difficulty may be occasioned by the offer for sale at auction of store stock imported from Canada or the Irish Free State which have been in this country an insufficient period of time to come under the Board's regulations. It will be highly undesirable for the stability of markets to be disturbed by unregulated offers for sale of stock from these sources. Unless the Board is able to reach agreement with auctioneers and importers we think that it may be necessary to prescribe by Order that compliance with any regulations governing home-fed stock should be made a condition of importation of similar stock. We have throughout assumed that, by negotiation with a live stock marketing board for Northern Ireland, sales of Northern Irish stock in England and Wales will be made subject to the regulatory provisions of the English Scheme. If, as we anticipate, there is one scheme for Great Britain, such an arrangement will be unnecessary in the case of trans-border traffic from Scotland to England.

49. **Late entries and withdrawals.**—We propose that the Board should accept late entries up to the time of sale at a fee of, say, 1s. per head for cattle and 3d. per head for sheep and pigs, provided that the acceptance of any such entry does not raise the number of effective entries, after deducting withdrawals, to a figure greater than 110 per cent. of the published entries for the particular market. Withdrawals should be permitted, at similar fees, provided that the effect of any such withdrawal, after adding the late entries, is not to make the number of effective entries less than 90 per cent. of the published entries.

50. Failure to consign.—We consider that variations of not more than 10 per cent. on the published anticipated entries would be a vast improvement on present conditions under which week to week fluctuations at individual markets are extremely violent and reliable information as to probable supplies is meagre. In order to enable the Board to maintain this standard of accuracy in its published forecast of pitchings, it is essential to take power to discourage producers from failing to consign stock entered by them and not withdrawn: the case of over-supply is met by the provision that stock may not be sold unless its entry for sale has been accepted by the Board. We propose, therefore, that if a consignor consigns less than 100 per cent. but not less than 75 per cent. of his accepted entries (including late entries) he should be charged a fee of, say, 2s. per head of cattle or 6d. per head of sheep or pigs for every animal he fails to consign; if he consigns less than 75 per cent. he should, in addition, be charged a fee of, say, 7s. 6d. and 2s. per head respectively for the number of animals by which his consignment falls short of 75 per cent. of his accepted entries. Neither fee should be charged if the producer satisfies the Board that failure to consign was due to circumstances beyond his control (e.g., disease outbreaks or restrictions arising subsequent to the making of the entry and notified by him at the earliest opportunity). The actual fees would necessarily be a matter for the Board to decide from time to time in the light of experience but we regard it as of importance that steps should be taken to ensure that the total actual entries at a market should never vary by more than 10 per cent. from the published anticipated entries.

51. Publication of anticipated pitchings.—The Board would thus have information at its disposal to enable it to publish the anticipated pitchings (classified by description of stock and correct to within 10 per cent.) at every market in the country, in time to enable buyers to arrange their programmes for the week; railway and road transport services would also be able to make their arrangements with far more precision and therefore more economically than at present. (See also Part IV.)

52. Self-regulating character of the scheme.—We have had strong evidence that where voluntary schemes somewhat on the lines of our proposals are in operation, e.g., where the list of entries for the next market is advertised, there is a marked measure of automatic regulation of the rate of marketing: the regular patrons of the market know that when the entries reach a certain number, it is unwise to add to the list and they withhold any additional stock. Our proposals are essentially a development of this idea. We consider that normally there will be no occasion for the Board itself to regulate the rate of marketing: it will merely have its finger constantly on the pulse of the market. If, however, it should prove necessary actively to smooth out the throughput of any

market (or markets) the Board should do so by the use of its powers under paragraph 42 of the Scheme; these powers are derived from Section 10 (1) of the Agricultural Marketing Act, 1933. In such an event the Board could prescribe the number of animals to be sold at a market; entries would be accepted in the order of priority of receipt and those left over should have a prior right of entry to the next market. Once more, however, we desire to issue a warning against any avoidable use of this power or against its misuse in an attempt to raise the general price level.

53. "Rings" and bidding agreements.—An auctioneer selling in a small auction with variable throughput has a difficult task; he is in a weak position to combat the formation of "rings." Under our scheme the throughput of markets, both individually and in the aggregate, should increase and become steadier insofar as stabilisation is consistent with the seasonality of production and the vagaries of the climate. The risk of "rings" and the like should be proportionately reduced. Nevertheless, we consider that the Board should be armed with powers, for use in emergency, to deal with any such contingencies which might threaten the efficiency of the scheme. There is only one really effective weapon for this purpose—the power to enter into the bidding and break the ring. We propose that the Board should have this power and consider that the existence of this power will in itself go a long way towards avoiding the necessity of its use.

Sales to Butchers.

54.—Register of approved butchers.—The Board should maintain registers of approved butchers and approved dead meat commission salesmen to or through whom producers could sell. In order that producers may be fully aware of the real price they are being offered for the meat they have produced, all direct sales to butchers or through commission men should be on a dead weight basis. It may not be possible to insist upon dead weight purchases by the country butcher, when negotiated personally on the farm, though it would be preferable if these could be negotiated, or at least recorded, in terms of dead weight. Approved butchers would also be free to buy by the head or by live weight at all approved markets. We suggest that the machinery of approval of individual butchers should be similar to that adopted in the case of auctioneers.

55. Conditions of approval of butchers.—After consulting representatives of the butchers, the Board would draw up conditions of approval which would include an undertaking by the butcher to:—

- (a) adopt standard trade practices so far as they concern the producer (e.g., standard methods of carcase dressing, etc.);
- (b) in the case of purchase direct from farmers, furnish the vendor with a purchase note of each transaction;

- (c) allow inspection of premises to check methods of carcase dressing, weights and records ;
- (d) record all purchases of live stock and permit the Board to inspect their records ;
- (e) supply the Board with weekly slaughtering returns and other information.

56. **Dead meat commission salesmen.**—In a like manner the Board would negotiate conditions of approval of dead meat commission salesmen which would be broadly similar to those for butchers.

57. **Prior selection of dead meat market unnecessary.**—Live stock markets are local assembly centres for the sale of all classes, weights and qualities of fat and other stock, whereas slaughterhouses are distributing centres and often handle only those specific classes, weights or qualities of meat which are in local consumer-demand. While, therefore, there is a strong case for restricting farmers to one live stock market for the sale of each class of live stock, it would not be an advantage to either farmer or butcher to restrict direct sales of fat stock to one slaughterhouse because the farmer cannot consistently produce the particular weights and quality required by one butcher or in one locality. We suggest that registered producers should be normally free to consign their stock to an approved butcher or dead meat commission salesman in any part of the country for sale on a dead weight basis without any formality except that they would be required to countersign and pass on to the Board, for statistical purposes, the purchase note (or duplicate) furnished to them by the approved butcher.

In the event, however, of the Board finding it necessary to regulate the rate of marketing of live stock, it might be found essential to require advance notifications of dead weight sales and only to permit sales in priority of notification up to a prescribed quantity.

Sales to Dealers.

58. **Conditions of approval of dealers.**—The Board would maintain a register of approved dealers. The conditions of their approval should provide for the regulation, where necessary, of their purchases on farms either by reference to quantities or to areas of purchase or to both, i.e., they might be authorised only to purchase up to a specified number of stock on farms within a given period or only to buy that stock in certain areas. The terms of the conditions of approval and the machinery of approval of individual dealers would, as in the case of other intermediaries, be the subject of consultation between their organisation and the Board, but the conditions might include an undertaking by the dealer to :—

- (a) adopt standardised trading practices ;
- (b) observe agreed conditions as to notification of entries for and withdrawals from, sale at auction markets ;

(c) provide the vendor with a purchase note of each private treaty transaction ;

(d) record all purchases of live stock and permit the Board to inspect the record ;

(e) furnish the Board with statistical and other information.

59. Board to be notified of sales.—The farmer would be required only to countersign the purchase note of private treaty sales to dealers and forward it to the Board for record purposes and as a check on the volume of purchases on the farm made by the dealer. The vendor would require some guarantee that the person to whom he proposed to sell was in fact an approved dealer ; this could be effected by the issue of “ identity certificates.”

60. Board to have power to restrict dealing on farms.—Our proposals as regards dealing on farms are designed to encourage sales by auction and, in the case of fat stock, by dead weight, and by grade where grading facilities are available. Circumstances may arise, however, in which the Board may wish to restrict or even prohibit private sales, e.g., in the event of such sales having a deleterious effect on the scheme either generally or in a specified locality, and we have provided the Board with powers for this purpose.

Farmer to Farmer Sales.

61. *Bona-fide* farmer to farmer sales should be free of all restriction, but it should be a condition of sale that the purchaser (a) would not resell the stock within 14 days, and (b) would furnish the vendor with a purchase note which the latter would countersign and forward to the Board as his record of the transaction. In order to enforce condition (a) and as a protection, in certain cases, to the vendor, it would probably be necessary for the Board to issue some form of “ identity certificate ” that the holder was a *bona-fide* farmer to whom registered producers might sell by private treaty, and the retention of the certificate would be conditional on the holder fulfilling his undertaking not to resell stock within 14 days of purchase by private treaty.

Specially Approved Marketing Centres.

62. We include under this heading such agricultural shows (including fat stock shows), old established fairs, private treaty markets and special auction sales of pedigree or other stock as are approved by the Board. In such cases as these the conditions and methods of sale would usually be satisfactory and no question of the Board exercising any regulatory power would normally arise. Nevertheless, it is necessary for intelligence purposes that the Board should have records of the sales effected.

It is suggested that in all these cases the Board should approve some person as an approved marketing agent by whom all sales should be recorded, and that it should be a condition of sale that notification of all transactions should be made to that person.

Exemptions.

63. *Exemptions from registration.*—There are a large number of persons engaged in live stock production in a small way of business whose inclusion in the Scheme, while greatly increasing the task of administration, would be of very little practical benefit to the Scheme. In defining such a class, for the purpose of exempting it from registration under the Scheme, we have sought to cover as many small producers as possible consistent with the necessity to secure that the efficiency of the Scheme will not be materially influenced by the volume of exempted produce, and that the dividing line between exempted and registered producers is equitable and the exemption test can fairly easily be applied. The formula we suggest (paragraph 26 of the Scheme) is:—

“Any producer whose pasture land does not exceed five acres in extent shall, unless in the twelve months immediately preceding he has sold more than 15 pigs or more than 10 sheep or more than four cattle (being pigs, sheep or cattle which he has himself produced in England) be exempt from registration.

“For the purposes of this paragraph, pasture land shall be deemed to be pasture land of a producer if, and only if, either solely or together with others, he has any right, otherwise than as a commoner, to graze animals thereon.”

A formula based entirely on the size of the holding would have been simpler, but it would have covered neither the case of specialist pig producers nor the case of a man who, having less than five acres of grass, agisted stock on another man's farm. It has therefore been necessary to add a qualification as to sales in the preceding twelve months. We estimate that this definition will exempt some 70,000 to 75,000 persons, less an unascertainable number who, while occupying less than five acres of land, nevertheless produce and sell more than 15 pigs a year.

64. *Exemptions from marketing provisions.*—In addition to the general exemption from registration under the Scheme, we consider that certain classes of stock might well be exempted from the marketing provisions, *but not from the intelligence provisions* of the Scheme. We therefore provide in the Scheme (paragraph 43) for the exemption from the marketing provisions of the following classes of sales, viz. :—

“(a) sales of pigs under contracts registered and confirmed under Part VI. of the Pigs Marketing Scheme, 1933, and sales of pigs to the Pigs Marketing Board ;

(b) sales of cows in milk and sales of cows and heifers expected to calve within three months of the date of the sale ;

(c) such other sales (if any) as may from time to time be determined by the Board.”

65. **Proposals may be brought into effect gradually.**—If the proposals in this Part of our Report are adopted, the Board may wish to bring them into operation by gradual stages. For the first year of the Scheme the Board would need to gain experience of the machine in operation, on which it could base its plan of rationalisation. In subsequent years the administration could be tightened up.

PART IV.—MARKET INTELLIGENCE.

66. The institution of a thorough system for securing statistical and other knowledge for the use of the Marketing Board is one of the key features of our proposals.

The information to be obtained is required for three purposes. It is required as a basis for the policy and day-to-day administration of the Board ; in the absence of a contract system or other method of direct regulation of the home output, it is required to enable the Government to regulate imports effectively while giving adequate notice to oversea countries ; it is required to give the meat industry, including live stock producers, adequate and equal opportunities for understanding past and present conditions and future prospects in the industry.

The market intelligence system, which we advocate, is primarily aimed at obtaining information for the use of the Board ; it will be for the Board to decide how much of that information is to be disseminated and in what form, although, later, we make certain suggestions as to the information the Board might publish.

67. **Information available to-day on home-produced live stock and meat.**—The live stock census taken annually on 4th June by the Ministry of Agriculture and Fisheries has constituted in the past the only source of long-term information on past and probable future national output. It is difficult to exaggerate the value of the knowledge thus acquired, but, at the same time, even more valuable information might have been available if it had been possible to take the census more frequently or to classify the stock in more detail.

The existing short-term market intelligence service is provided by the Ministry and also by the trade, agricultural and local Press. Its usefulness is limited by the complexity of the marketing system and the large variety of unstandardised types of stock. These limitations are well recognised and must be overcome.

Past and current supplies.—The Ministry publishes weekly figures in the Agricultural Market Report of the number of live stock of various classes passing through some 40 markets in England and Wales. The value of these figures for the assessment of the supply

situation is, however, limited. The reported markets represent only 4 to 5 per cent. of all markets and under 30 per cent. of the total throughput of all markets; the volume of actual transactions in each class of stock is not distinguished; the proportion of certain descriptions of live stock, e.g., fat and store cattle, dry cows, which are purchased for further feeding or for slaughter, is unknown; finally, the figures do not adequately take into account the factors of quality grade or weight category.

Similarly, figures are published daily or weekly for a few of the wholesale meat markets (e.g., Smithfield) of the pitchings of dead meat on these markets. This information is also of limited value on account of the small size of the sample and because the figures relate to pitchings and not sales.

The agricultural and provincial Press also publish information on supplies which is necessarily incomplete.

Past and current prices.—The Ministry also publishes weekly records of prices obtained at the 40 live stock markets reported: in these reports, store and breeding stock of all classes of live stock are quoted at so much per head; fat cattle (which are in most markets weighed before sale) are quoted at so much per live cwt.; fat sheep and lambs and fat pigs are quoted at so much per lb. dead weight and so much per score lb. dead weight respectively. Although fat sheep, lambs and pigs are sold by the head they are quoted on a dead weight price basis, the reporter making an estimate of the dead weight in order to calculate the price per unit of dead weight. Unfortunately, however, owing to variations in the ratio of live to dead weight and to the impossibility of seeing the carcase of an animal shrouded in a hide or skin, the estimation of dead weight from inspection of the live animal, and accordingly the accurate reporting of fat stock prices on a dead weight basis, is extremely difficult. For a number of other reasons the existing price reports are of limited value. They only relate to a limited number of markets; the price records only cover, in general, first and second quality live stock, i.e., important classes are not recorded at all; the quality grades adopted by different market reporters are not always comparable; even for the qualities recorded the recorded price is only a sample (sometimes quoted merely at the discretion of the auctioneer) and not the true (weighted) average price.

With the exception of beef prices at centres where the National Mark Beef Scheme is operated, the same limitations apply to price records at wholesale meat markets, whilst live stock and meat price reports in the agricultural and provincial Press are necessarily incomplete and therefore of limited value.

Future supplies and future prices.—No published information on the probable course of supplies and prices in this country is available; neither are the data on past supplies and past prices adequate for

use, in conjunction with data on current trends, in estimating accurately the probable supplies and prices in the future, though, of course, the general seasonal trends are known.

Demand.—The available data on supplies and prices are definitely inadequate for the estimation of demand, whilst direct short- and long-term market intelligence on the demand side, whether for dead meat in consuming centres or for store cattle in fattening areas, is almost non-existent. Thus, as regards fat stock, current data on the volume and locality of weekly slaughterings is only published for one or two centres; as regards the demand for store stock, public knowledge is largely limited to the Ministry's monthly report on pasture and crop conditions which can be used to throw light on the probable demand for store stock. Similarly, little or no published information is available on the locality and nature of the demand for different types and cuts of meat.

68. *Information available to-day on imported live stock and meat.*—Home-killed meat is in competition with imported meat. It is, therefore, highly desirable that the Board and all persons interested in the home-killed trade (including producers) should have all available information on the supply, prices, and demand situation of imported live stock and meat. The published information on imports (other than that supplied by the monthly and annual import and export trade returns) is briefly described below.

Supplies.—Weekly figures of the arrivals in this country of live stock and of the various kinds of dead meat are published officially or in the general and trade Press. Periodically also the trade papers publish the cold storage stocks in the chief exporting countries and the export killings of the current season, month-to-month, and to date.

There are, then, available some data on the past and prospective supplies of meat from overseas. No information is, however, published as to the movements in and out of cold store in this country. The day-to-day information as to supplies available, offered for sale and sold is incomplete and may be misleading, since in some of the large wholesale centres, like London, it is very difficult to isolate movement between ships, cold stores (some of which are situated inside Smithfield), and the market proper.

Prices.—As regards prices, the published data are much more reliable than in the case of home-grown produce since they refer mainly to dead meat classified into numerous standard grades. The prices are published by the wholesale market authorities and, through importers and other trade organisations, in the daily or weekly Press.

It is not possible to-day to record the prices of imported fat cattle with any greater accuracy than the prices of home-fed cattle.

Demand.—No published data deal specifically with the demand for imported meat. It is reasonable to suppose that a very considerable amount of information as to the demand for refrigerated meat is readily at hand in a trade organised so closely in a few large units.

INFORMATION TO BE OBTAINED BY THE BOARD ABOUT HOME-PRODUCED LIVE STOCK AND MEAT.

69. *Types of information required.*—The information which the Board will require falls under two main headings :—

(a) *Automatic.*—Automatic information, i.e., information which would be supplied regularly to the Board, would be mainly quantitative in that it would relate to the volume and origin or destination of purchases and sales, stocks in hand or slaughterings, and would, in the case of producers, include the half-yearly census and quarterly forecasts. Information of this type should be supplied regularly to the Board either as a condition of sale, in the case of registered producers, or as a condition of approval, in the case of auctioneers, dealers, butchers and dead meat commission salesmen. Quantitative information regarding meat markets could probably be obtained regularly from the relevant market authorities without difficulty.

(b) *Special.*—Special information would relate mainly to quality grades, weight categories and prices, and would have to be obtained by the Board through its own officers or other qualified agencies on account of the difficulty (due to the problems of accurate weighing and grading of live stock) of getting this type of information with any reliability from persons without special qualifications. Expense and administrative considerations would preclude the obtaining of this information for all transactions.

70. *Heads of information to be supplied automatically to the Board.*—The information required will vary with the class of transaction to which each return relates. For brevity, the main headings of automatic information are listed and given a code letter so that the information to be supplied to the Board by the various persons concerned in each of the different statistical returns can be indicated simply by the code letters.

The heads of information are :—

<i>Code.</i>	<i>Nature of Information.</i>
A.	Farm of origin or place of purchase.
B.	Purchase price per unit weight (by quality grade and weight category where possible).
C.	Number of each class or description of live stock.
D.	Name, description (e.g., dealer or butcher) and address of consignee.

RETURNS TO BE MADE BY THE REGISTERED PRODUCER.

Para. ref.	Nature of return.	Information to be supplied (Code).	Time or frequency of return.
37	(i) Census of live stock ...	A, C ...	Dec. and June.
37	(ii) Forecast of sales of stock for slaughter.	A, C ...	Quarterly.
48	(iii) Entry of stock for sale by auction.	A, C, D*	Normally seven days before any sale.
61	†(iv) Record of private treaty sale to another producer.	A, C, D	} Immediately after stock leave farm.
59	†(v) Record of private treaty sale to an approved dealer	A, C, D	
57	†(vi) Record of private treaty sale to an approved butcher.	A, B, C, D	

RETURNS TO BE MADE BY AUCTIONEERS, DEAD MEAT COMMISSION SALESMEN AND BY THE MINISTRY OF AGRICULTURE AND FISHERIES. ‡

Para. ref.	Nature of return to be made by :—	Information to be supplied (Code).	Time or frequency of return.
<i>Auctioneers.</i>			
46	(i) Sales of live stock on commission.	A, B, C, D	After each auction
<i>Dead Meat Commission Salesmen.</i>			
56	(ii) Sales of live stock by dead weight on commission.	A, B, C, D	Weekly.
56	(iii) Slaughtering	C	Weekly.
<i>Ministry of Agriculture.</i>			
40 & 99	(iv) Sales of live stock by dead weight and grade.	A, B, C, D	Weekly.

RETURNS TO BE MADE BY APPROVED DEALERS, APPROVED BUTCHERS AND PRODUCERS BUYING ON THE FARM FROM OTHER PRODUCERS.

Para. ref.	Nature of return to be made by :—	Information to be supplied (Code).	Time or frequency of return.
<i>Approved Dealers.</i>			
58	(i) Record of all transactions...	A, C, D	... Weekly.
58	(ii) Stocks in hand (including stocks in transit).	C	... Weekly.
58	(iii) Purchases on the farm from farmers (Purchase note to be handed to selling farmer).	A, C, D	... At time of sale.

* In this case D would be the producer's selected auction.

† In these cases the return would be made out by the purchaser: the producer would only be required to countersign and forward it to the Board.

‡ The producer will be under no obligation to make returns in the case of sales through auctioneers (other than the entry for sale), dead meat commission salesmen or under the Ministry's dead weight and grade scheme.

<i>Para. ref.</i>	<i>Nature of return to be made by :—</i>	<i>Information to be supplied (Code).</i>	<i>Time or frequency of return.</i>
	<i>Approved Butchers.</i>		
55	(iv) Slaughterings	C ...	Weekly.
55	(v) Unslaughtered stocks in hand (including stocks in transit).	C ...	Weekly.
55	(vi) Private treaty purchases from farmers (Purchase note to be handed to selling farmer).	A, B, C, D	At time of sale.
	<i>Producers buying on the farm.</i>		
61	(vii) Purchases on the farm (Purchase note to be handed to selling farmer).	A, C, D	At time of sale.

71. **Special information to be collected by the Board.**—Apart from information as to the volume, market movements and slaughter of home-produced live stock and meat, the Board will need parallel information on imported supplies. It should also record the prices of live stock and dead meat, whether imported or home-produced, and should study all general factors which affect supply and demand.

72. **Market price reports at live stock markets.**—The shortcomings of the present system, and the difficulties of reporting prices in terms of unit dead weight when the sales are made by the head alive have already been discussed. Three suggestions are made below for improving market price reporting at live stock auctions :—

(a) **Revision of classification of stock.**—It is suggested that the classification by quality grade and weight category at present used for the broadcast of fat stock prices (as outlined on page 59 of Economic Series No. 20, page 69 of Economic Series No. 29, and on pages 92-93 of Economic Series No. 12) should, together with analogous classifications for store and breeding stock, be the basis of a revised market reporting system.

(b) **Revision of unit of quotation.**—Store and breeding stock prices are at present quoted at a price per head. With the existing system of classification these quotations are of limited value, but with revised classifications they should become of appreciably greater use. The Board might consider whether store cattle prices (if and where store cattle are weighed before sale) should also be quoted in price per live cwt.

No change is suggested in the method of quoting fat sheep or fat pigs on a dead weight basis, but fat cattle prices might be quoted both per live cwt. and say per stone dead weight. This would enable farmers more easily to compare livestock auction prices with dead meat market prices.

(c) *Increasing the number of reported markets.*—It is probable that the cost of reporting the majority of auction centres approved by the Board would be very considerable. Nevertheless, we cannot emphasise too strongly that better market reporting is the key to the proposed intelligence system, and that the latter is one of the main features of our plan of reorganisation. The Board must not be afraid to spend money on market reporting if it wishes the plan to be a success.

But no improvement of the system would dispense with the need for a large, well-trained and full-time staff of market reporters. These reporters could travel from market to market and could probably be used also for administrative work at the markets and in the districts of their circuit. It will be desirable to check the accuracy of their reporting and still more so to keep the standard uniform throughout the country. This would be helped by periodic visits to their markets by supervisors, by the slaughter, weighing and grading of samples of stock from their markets and by the provision of demonstrations or of short courses at abattoirs. It will take time before a properly trained staff is available.

73. *Market price reports at wholesale dead meat markets.*—The Board should invite all dead meat market authorities to supply it with the following information regarding both home-produced and imported meat for each market day :—

- (i) the volume of the different kinds of meat offered for sale and sold, specifying quality grade and origin where possible ;
- (ii) the average daily price for each grade of the various kinds of meat ;
- (iii) the general tone of the market.

Every effort should be made to secure that price quotations are uniform over all wholesale meat markets. To achieve this it is suggested that the prices quoted for the different qualities should be comparable with quotations for the various National Mark grades.

No doubt the market authorities would gladly co-operate with the Board in seeing that the reports were accurate and comparable.

74.—*Market price reports : Offal prices.*—The price obtained for offals may represent 10 per cent. or more of the value of the animal after slaughter, and may influence appreciably the price obtained for fat stock by the farmer. The Board should, therefore, take steps to obtain better price reporting of hides, skins and other offals so that it may be able to determine whether, after making allowance for the value of the offals, the carcass price on dead meat markets is in proper relation to fat stock prices at auction markets or to fat stock purchased on a dead weight basis (sinking the offals).

In this connection we would suggest that the Board should seek the co-operation of the Hide Markets Association in order

that the latter's statistics of home-produced hides may be used as a check on the Board's slaughtering data.

75. General information.—In order to formulate an effective policy the Board will need to collect some information on conditions outside the regular live stock and dead meat markets. Thus, although it is anticipated that, under a system of quantitative regulation, imported supplies of live stock and meat will fluctuate only within narrow limits, the Board should seek to inform itself of the weekly arrivals of these products and also of their movements after arrival. Although the Board would have no power to obtain information from the importing interests, the maintenance of stable prices will be a matter of common concern and should therefore stimulate co-operation for intelligence purposes.

The Board should also secure the fullest information on retail prices of meat ; on the consumption and prices of substitutes for meat ; on the production situation, especially as regards the state of pastures, the progress of rearing and feeding of stock (e.g., the rate and yield of lambing) ; it should keep itself well informed of the broad tendencies in home agriculture.

Use of information collected.

76. Major uses of information.—The information discussed in the preceding paragraphs will be required both for the administrative purposes of the Board and for publication.

We have already suggested that, in the sphere of supply regulation, the Board's chief task will be to keep its finger on the pulse of home production. This it will be enabled to do by the intelligent use of the results of the census and forecasts and of supplementary information. The same information would also give the Board warning of the possible need in the future to regulate the home output. It is, of course, essential that the Board should place its information, in confidence, at the service of the Government.

The whole policy of the Board in the matter of market organisation should be based on accurate information which indicates where further reforms of the marketing structure are required and which will permit an authoritative comparison to be made between different methods of marketing and even between different marketing units. The effective administration of any scheme must depend on the ability of a board to detect evasion and the market intelligence service will help the Live Stock Board to police its scheme.

Finally, there will be much information which can advantageously be published for the benefit of producers, buyers, butchers and others.

77. Publication of material : Discretion necessary.—Discretion will need to be exercised in the publication of statistics, and none should be published in a form prejudicial to individual interests.

Our scheme anticipates the continuance of existing trade channels operating under "free" market conditions but with a greatly improved market intelligence system ; there is, therefore, a *prima facie* case for a generous use of that discretion.

In general, the desirability of publication or otherwise of particular statistics must remain a matter for decision by the Board.

The major information which the Board would normally publish would probably be :—

- (a) supplies entered at live stock markets ;
- (b) the volume of pitchings, sales and slaughterings at live stock markets, wholesale meat markets, and slaughter-houses, and stocks in dealers' and butchers' hands ;
- (c) price reports (by quality grade and weight category) at live stock markets and wholesale meat markets ;
- (d) an appreciation of the existing and probable future demand situation for meat in industrial centres, and for store and breeding stock in producing areas, and of pasture and crop conditions.

As regards frequency of publication :—

- (a) Data as to future offerings of live stock at markets would be received at the Board's offices daily according to the closing dates for entries for sale at live stock markets, and could be available daily on a subscription service for a proportion of markets, or could be published bi-weekly for, say, 50 per cent. of markets, or weekly for all markets.
- (b) Quantitative data on current supplies would be arriving daily from meat markets, on various days of the week from live stock markets, and once a week from butchers and dealers. Meat market intelligence could be issued daily to the Press or on a subscription service, live stock market intelligence (other than market entries) daily on arrival or as a weekly summary, and data on stocks and slaughterings, say, once a week.
- (c) Price reports would be arriving daily from meat markets and on various days of the week from live stock markets. They should be dealt with in a similar manner, daily on arrival.
- (d) An appreciation of the demand and keep situation might be issued weekly.

In deciding on the frequency of publication of any series of statistics, the Board would have to consider the purpose for which publication of each class of information is required, the cost and administrative details.

78. **Methods of publication.**—This again is a matter for the Board but the following suggestions are put forward for consideration :—

(a) *Daily news service.*—This could be prepared every night as soon as the results of the day's trading were known and could be issued as Press releases to the daily Press, as a telegraphic or other subscription service to buyers and for exhibition at approved marketing centres or the Board's local offices. In addition, the daily news service could on specified days contain figures which were only published weekly and could also give data on future supplies at live stock markets.

(b) *Weekly Summary.*—This would be based on daily price and supply reports and on the various weekly returns, and would contain the weekly appreciation of the demand and keep situation. It might be published on subscription and would prove, incidentally, a valuable medium for administrative and educational propaganda.

(c) *Broadcasting.*—The Board should co-operate with the British Broadcasting Corporation in arranging the latter's live stock market reporting service.

79. **Occasional publications.**—After some experience of the working of the market intelligence service, annual or quarterly summaries of supplies, prices and slaughterings, by both areas of supply and areas of demand, would become useful to the industry as a whole. Published statistical information on the general position is at present badly lacking and such statistical summaries should prove extremely valuable; the U.S.A.* and Canadian annual summaries of marketings, movements and prices offer a striking contrast to the information circulated in this country.

The Board might also conduct or promote and publish the results of research into its statistics on such subjects as the nature and seasonality of the demand in certain areas or factors affecting supply. The object of these annual and quarterly statistical reports and research studies would be to provide a background (which is at present absent) to the market intelligence service; their publication should improve the value of the daily and weekly market intelligence, and thus assist smoother and more efficient working of the marketing machine.

80. **Cost and finance of collecting and disseminating market intelligence.**—It is apparent that the cost of a market intelligence service operating on the scale we recommend would be appreciable. Nevertheless, half measures might be almost useless and it is probable that, if our marketing plan is to be a success, market intelligence will be the heaviest item of the Board's expenditure. The service,

* The Agricultural Market Intelligence Service in U.S.A. is briefly described in the Annual Report of the Chief of the Bureau of Agricultural Economics (U.S.A.) for the year ended 30th June, 1932.

however, will not only be used by producers, directly in their personal marketing operations and indirectly through the Board, but will be directly used by auctioneers, dealers, butchers, transport agencies, imported meat interests, government departments and so on. These interests should contribute to the cost of the scheme.

It is, therefore, suggested that market intelligence should be financed by several or all of the following classes, institutions or authorities :—

- (a) Producers—through the levy.
- (b) Approved auctioneers, dealers and butchers—on a subscription basis.
- (c) Market owners, market authorities, railway companies, meat importing interests, etc., might wish to contribute—on the grounds that the Board's service would improve and might supersede the intelligence service they already do, or should, provide and would be useful to them for administrative purposes.
- (d) The State might contribute on the grounds that the Board's intelligence service :—
 - (i) might cheapen the cost of collection of official statistics (e.g., by the Ministry of Agriculture, Ministry of Health, Board of Trade);
 - (ii) would provide information of use for administrative purposes (e.g., disease control, location of new abattoirs) and in formulating policy; and
 - (iii) would provide information which was to the national and, in particular, consumers' interests.
- (e) Individuals through the sale of publications or the provision of special subscription and telegraphic services.

PART V.—PRODUCTION EFFICIENCY.

81. If producers, as a result of supply regulation, are to enjoy greater economic security, they must make active efforts to produce what the consumer wants, and to keep their production costs down. In matters of quality, production efficiency may involve higher costs; farmers are, therefore, apt to disregard quality improvement in bad times but will pursue it once more when times are better. There is thus a tendency for higher prices to be associated with higher costs, although it should be possible to counter this tendency by lower costs due to increased efficiency in the form of better stock management.

We have not attempted to investigate all the possibilities of improving methods of production and, in particular, we have not systematically considered the veterinary aspects of the live stock

industry, though we fully appreciate the extreme importance of action to reduce the incidence of disease. But we believe that the encouragement and active organisation of methods of better production will be an important ancillary duty of a Live Stock Marketing Board. In the paragraphs which follow we suggest, more by way of example, one or two of the lines which we think the Board would do well to follow up.

82. Improvement of Pastures.—Grassland is the basis of the cattle industry. In recent years there have been important developments in pasture research in the form of the evolution of new types of plants, new methods of cultivation and manuring, and new technique in management and grazing, which have been proved capable of increasing the stock carrying capacity of the land and lengthening the grazing season. The wider application of these new methods would lead to a reduction in the cost of production of beef.

83. Cost of stores.—As stated in paragraph 30, we have been unable to obtain figures which we consider could safely be regarded as representing average costs of production in this country. Our inquiries have, however, shown that approximately two-thirds of the cost of fat cattle production in this country is represented by the cost or price of the store. We consider, therefore, that the efficiency of store production is a matter which must receive the attention of the Board.

84. The Store Period.—Indifferent feeding and management, especially during the first year, have bad effects on conformation, and, thence, on quality. The majority of calves destined for the beef market go through a prolonged store period during which they grow but do not fatten. The result is that they may not be ready for slaughter until 2½ to 3 years old, and even then, do not generally exceed 12 cwt. live weight, whereas calves of dual purpose or beef types, if properly fed from birth during a shorter store period, may be sold fat, weighing, say, 9½ to 10 cwt. live weight at 20 to 24 months' old. From a beef producing point of view, therefore, a prolonged store period is inefficient in that it is responsible for slow maturity and accentuates any faults in conformation—and ultimately, of course, in carcass quality—due to the use of low-grade parent stock and inefficient rearing in the calf stage.

We do not think it necessary to attempt to eliminate the store period, nor do we think that it would be practicable to do so since the practice of feeding young cattle, after weaning, on bulky feed, i.e., second-class pastures or inferior hay in the store raising areas, before they are sold for fattening on the better pastures and in arable areas, affords an economic outlet for the country's heavy supply of such feeds. We think, however, that there is scope for improvement of the quality of stores by better management of pastures

and, where necessary, by supplementary feeding. We, therefore, recommend that the Board should pay special attention to this aspect so as to guide producers on the right lines.

85. Cattle breeding policy.—The Improvement of Live Stock (Licensing of Bulls) Act, 1931, which comes into force on the 1st August, 1934, will not entirely solve the quality problem from the breeding point of view. This Act will only preclude the use of bulls “of defective or inferior conformation and likely to beget defective or inferior progeny.”

Apart from those received from Ireland and Canada, the bulk of the supplies of stores, on which the country relies for its beef production, emanates from dairy herds. Over 800,000 home-bred calves are slaughtered annually for veal (see Table II); this figure indicates a possible subject of reform of first-class importance.

In those cases where dairy herds rely on breeding and rearing their own heifers for replacements, it is only natural that a dairy type bull should be used. Such bull and heifer calves as may be sold are consequently, as a rule, not of the best type for beef production, though much could be done to improve their quality by the methods outlined in the previous paragraph. In other cases, dairy farmers do not rear heifer calves but rely on purchases of down-calvers for replacement of wastage. The main object in these herds is simply to get the cows calved for the purpose of milk supply, without regard to the quality of the calf, and any bull is thought to suffice for this purpose. A considerable improvement in the quality of stores could be attained and a larger proportion of calves would be worth rearing if a good beef type of bull were always used, and we suggest that the Live Stock Board, in collaboration with the Milk Board, should endeavour to foster this system.

We suggest, however, that the amount available for grants under the Ministry's Premium Bull Scheme should be increased and that, in particular, attention might be concentrated on those areas where calves and stores are bred for export to the fattening areas. The Board should contribute to the finance and organisation of this development.

86. Dairy herd wastage.—The rate of replacement of cows in the dairy herds of this country is excessive and disease is primarily responsible for this. An extension of the average life of dairy cows, through disease control, would help the dairy industry by reducing the cost of milk production, but it might be of still greater benefit to the beef industry. The volume of cow beef, now believed to be one-third of the total supply of home-fed beef, would be reduced and a larger proportion of the calves of the country could be sired by bulls of the beef type, thus giving the beef feeder more and better home-produced raw material.

We believe that there is scope for further investigation into this question of dairy herd wastage and its control and we suggest that it

should be jointly examined by the Live Stock and Milk Marketing Boards.

87. Cattle recording.—Experience has shown that the best way of improving production efficiency is by setting up measurable standards such as those obtained by milk, egg and pig recording.

There are, however, particular difficulties in the way of operating a recording scheme for cattle. In this country a beef animal may change hands many times before slaughter. Further, on few farms are there suitable weigh-bridges. It is suggested, therefore, that instead of a recording scheme of the usual type, the possibilities of calf marking, and the sale of stores and possibly calves by weight and class should be seriously examined.

A scheme on the lines of the Brecon calf marking organisation, which enabled the parenthood of calves to be determined, would be of considerable value to the calf rearer, store raiser and cattle fattener even if it only indicated to him the type of sire by which the calf was bred (e.g. beef, dual-purpose or dairy). His knowledge of the growing and fattening potentialities and beef propensities of the calf or store would be increased, especially if the mark also gave an indication of age.

But the value of such a scheme would be enhanced if operated in conjunction with the sale of calves and store cattle by class and live weight—a method of sale which admittedly has its difficulties, but has not the disadvantages which a similar scheme for fat stock would have to face.

It must be admitted that any scheme of this nature would present many administrative and other difficulties such as (i) the movement of animals from one area to another between birth and slaughter, (ii) the difficulties of weighing, (iii) the problem of identifying the sire and so on.

We fully appreciate these difficulties, but the necessity for improving the quality of stores and the efficiency of store production is so great that the Board and the other interests concerned should consider the possibilities of a scheme on these lines.

88. Heavy cattle.—Although there is some demand for large joints from certain sections of the meat trade, this demand is insufficient to absorb the available supplies of heavy cattle over 11 cwt. live weight except at relatively low prices. For summer fattening, heavy cattle have certain technical advantages: they fatten quickly and can generally be disposed of before the autumn glut arrives and they can stand up to strong pastures better than young cattle; but for the best class of family trade the tendency in the last few years is to regard 9½ cwt. as the most useful live weight. We trust that, in this connection, better market intelligence—by establishing what is at present disguised, i.e., the demand, and consequently better price, for light weight cattle—and the adoption of improved methods of store raising, will in time solve this problem.

89. **Warble fly control.**—We have received evidence from the Warble-Fly Committee of the Leathersellers' Company which satisfied us that the market for home-produced hides may suffer permanent harm unless action is taken without delay to stamp out the warble fly. The damage done by the fly is serious. The annual loss on damaged hides alone has been estimated at upwards of £500,000. Moreover, apart from the loss of condition due to gadding, the butcher often finds the flesh beneath the warbled areas so altered by the inflammation set up that the beef is useless for human food. We are aware that it will never be possible to clear the country of warble flies unless complementary action is taken in Ireland and Canada, from which countries we import stores. Nevertheless, we think that a national campaign against the warble fly should receive the support of the Live Stock Board. We think that the Board could not conduct the campaign itself but that legislation will be required. The suggestion has been made to us that, by this legislation, it should be competent for local authorities in any area to require all cattle to be dressed against the fly at least three times a year and to prohibit the importation into the area of any cattle from another area which has not adopted similar measures, unless accompanied by a certificate that the cattle have been dressed. We agree that such action would be useless unless accompanied by rigorous inspection during the four months March to June.

90. **Sheep breeds.**—The need for intensive improvements in production is not so insistent with sheep as with cattle. At the same time there is scope for considerable improvement in the breeding and management of sheep, particularly in areas where arable sheep farming is giving place to grass sheep farming. We recommend that the Board should ascertain and use its influence to secure the use of the best crosses for early lamb production and should aim at the reduction of breeds in some areas. In co-operation with the Ministry of Agriculture, it should facilitate the extension of the Premium Ram scheme.

91. **Pigs.**—The Report of the Reorganisation Commission for Pigs and Pig Products (pp. 48-52) suggests that there is ample scope for improvement in pig breeding and management, and we think that the Live Stock Marketing Board should co-operate with the Pigs Marketing Board in a joint attack on some of these problems.

92. **General efficiency campaign.**—We consider that the Board, acting in co-operation with the agricultural education authorities, should conduct a general efficiency campaign. A Board under the Marketing Act is in direct contact with farmers and should provide an admirable and cheap channel for advisory and educational work. We consider that, in the first place, the Board should concentrate on better breeding, better calf rearing, better grassland management, better winter feeding of stores and supplementary feeding of grazing stock.

93. Education and research.—Under the Agricultural Marketing Acts, powers to promote and conduct agricultural education and research may be included in a Marketing Scheme. We have decided that it is desirable to include these powers in our Scheme.

The present organisation of agricultural education is on a territorial basis. As the Boards come into operation, farmers will be grouped not according to district, but according to what they produce. Thus, for example, pig feeders will be connected with the Pigs Board, and milk producers with the Milk Board. It is through these connections that the specialised information and advice should be passed to producers. The organisation of producers on a commodity basis will also afford means of testing the practical value of the results of research and the Boards could give valuable assistance in the control and elimination of certain diseases. Full use should be made of these new facilities which will come into being with the establishment of the Live Stock Board.

There is some doubt, however, whether the Board itself should conduct education or research, apart from that economic research which is part of the market intelligence service which we have recommended. There is already in existence a national system of research and education with an advisory service for farmers, and the initiation of additional educational or research work by the Board might lead to unnecessary overlapping and confusion, with waste of public funds. We have not thought it to be our concern to enquire whether the existing system is efficient and adequate to the needs of the industry, but, in any event, we think that some degree of reorganisation may be desirable to adapt it to the new circumstances arising from the establishment of marketing boards. As there are already in existence a multiplicity of authorities dealing with agricultural education and research, the reorganisation will require careful consideration. We, therefore, suggest the appointment of a special committee to consider what modifications, if any, of the present system of agricultural education and research are required to adjust the system to the new organisation of agriculture likely to arise from the establishment of the marketing boards.

PART VI.—SLAUGHTERING PROBLEMS.

94. Under this heading we have found it convenient to group our recommendations on a number of related subjects, the chief of which are the centralisation of slaughter, the National Mark scheme for meat and the sale of live stock by grade and dead weight. We consider that each of these three subjects should be considered separately and should stand or fall on its own merits, but we believe that one of the economic justifications of a further centralisation of slaughtering facilities lies in the fact that it will make possible on a wider scale both the standardisation of carcase grades and the sale of live stock by grade and dead weight.

95. **The Centralisation of slaughtering.**—The centralisation of slaughtering was the subject of close study, throughout 1931 and the first half of 1932, by a Committee of the Economic Advisory Council, whose published report* has been of great help to us, and renders it unnecessary for us to restate the problems of that difficult question. We could not fail to recognise that slaughtering arrangements are a matter of great significance to the live stock industry, and we have therefore sought the opinion on this subject of the majority of the witnesses we have heard. Our general conclusion, with which most of those giving evidence before us seemed to agree, is that the movement towards the centralisation of slaughter is desirable and inevitable, that it should follow a well-conceived long-range plan, but that it should not be too precipitate. We think that any development of centralised slaughtering will come through the erection of new abattoirs or the enlargement of existing ones by local authorities, and we know that a number of such authorities in various parts of the country are now considering the construction or improvement of a public abattoir. Some immediate progress towards centralisation is therefore to be anticipated.

We have already taken one step to promote and guide this development by recommending the appointment of a small Committee to study the technical requirements of the factory abattoir and a Committee of considerable standing in the industry has been appointed, under the chairmanship of Sir Francis Boys.

We recommend further that there should be appointed a body which might be known as the National Slaughterhouses Commission. This body should have advisory and planning, but not executive powers. It should be required to initiate proposals for the erection of large scale slaughterhouses and to plan zones of operation; its advisory functions should also include the co-ordination of all plans prepared by other authorities; it should be consulted before any abattoir scheme is sanctioned.

* Economic Advisory Council: Report of Committee on the Slaughtering of Live Stock. Price 2s. 2d. post free.

We think that the powers of this Commission should be reviewed after a period of three years in order to see if they are adequate.

Almost inevitably the establishment of a central slaughterhouse on an economic basis will necessitate the closing within its area of private slaughterhouses and we, therefore, recommend that statutory provision be made both for the closing of private slaughterhouses, in any area where a central abattoir is projected or established, and for their compensation if the closure is effected within 10 years of the giving of formal notice of the intention to close. In such cases, compensation should be limited to the amount of loss, if any, suffered. We think, moreover, that the closing down of private slaughterhouses will be ineffective so long as live stock can be slaughtered just outside the zone for sale as meat inside it, and, accordingly, we recommend that, in any area in which a scheme for the closing of private slaughterhouses has been sanctioned, all home-killed meat imported into the area should be brought to the abattoir or other selected centre for inspection.

96. The National Mark.—Long before the start of the National Mark beef scheme, carcase grading was practised by the imported meat trade, who realised that it was necessary as a matter of good business organisation. On the one hand, it enabled each firm to meet different types of demand with meat of suitable quality; on the other, it was a considerable advantage to buyers who could select their beef with much greater facility; in fact, they could order their meat by telephone on grade alone.

In grading of this kind no attempt is made to interest the consumer. It is usual to stamp the grade mark inconspicuously and, as a rule, the butcher removes it before sale to the consumer. As regards the oversea producer, the grading system only helps him insofar as it fosters trade in his product.

No general system of grading obtained in England before the start of the National Mark beef scheme, though, at Birkenhead, wholesalers in the Irish trade used to employ experts to sort out the beef according to the types required in the various consuming centres.

The primary objects of the National Mark beef scheme are:—

(a) as regards the consumer, to give a visible guarantee of the quality and origin of home-killed beef, and thus to increase its consumption by creating confidence in the product;

(b) as regards the retailer, to help the business of the trader who deals regularly in good class home-killed beef by having the beef marked with what amounts to a national certificate of merit; further, to make it easier for him to purchase supplies of regular quality, if necessary, without previous inspection;

(c) as regards the wholesaler, to enable him to offer a guaranteed article to large buyers and the retail trade; to

steady prices, since with a graded article all produce of the same grade tends to fetch the same price at any given time; and in particular to encourage the sale of home-killed beef in the large centres of consumption where the main business of wholesaling is done;

(d) as regards the beef feeder, to strengthen the market for the higher qualities of home-killed beef, and thus stimulate an improvement in the quality of stock produced; and to provide a basis for advertising the home product, insofar as it is desired to do this beyond the advertisement given by the Mark itself.

The scheme was started in October, 1929, in London, Birkelhead and Birmingham. It was extended to the Leeds, Bradford and Halifax area in 1931, and, recently, to Liverpool. The scheme presupposes the existence of a considerable concentration of slaughtering, i.e., one or more large abattoirs, for effective and economical working in any area. The expense of grading in a city which has no central abattoir is prohibitive. The number of areas in England and Wales, to which the scheme could be extended, without the erection of further large abattoirs, is limited, and we are informed that it is probably confined to the Manchester, Cardiff and Swansea districts.

Since the scheme started, its progress has been twice reported on favourably by Inter-Departmental Committees. The earlier Committee* said: "We are convinced that the grading and marking scheme if developed will be of great assistance to the cattle industry of this country," and recommended its extension to the Leeds and Bradford area. The second Committee† said that they were "confident that the scheme has been of benefit to producers, consumers and distributors," and recommended that in the interests of British agriculture it should be continued.

97. We are ourselves convinced that the National Mark beef scheme, on the general lines on which it is to-day operating, deserves the utmost encouragement. We recommend its extension to cover such other areas as can provide adequate facilities for the grading and marking of carcasses in sufficient volume.

We recommend also its extension to other descriptions of meat, namely, mutton and lamb, and pork, if a satisfactory technique can be devised.

We have considered whether the administration and finance of the scheme should not become the responsibility of the Live Stock Marketing Board. We have come to the conclusion that confidence in the integrity and impartiality of the grading is of such

* Report of an Inter-Departmental Committee on the Grading and Marking of Beef, 1930. Cmd. 3648.

† Report of the second Inter-Departmental Committee on the grading and Marking of Beef, 1932. Cmd. 4047.

importance as to make it desirable for the staff of graders and the operation of grading to continue to be under the control of the Agricultural Departments. But we do not think that the scheme should continue to be a charge upon the Exchequer. We recommend, therefore, that the cost of the scheme should be repaid by the Board out of its general funds. The effect of this will be that all producers will contribute to the cost of the scheme and not merely those whose stock happen to be of National Mark quality and to be sold in centres where the scheme is operating ; we believe this to be equitable since it is to the advantage of all producers that the demand for home-killed meat of the highest quality should increase in the big centres of population.

98. Sale by grade and dead weight.—The Ministry's experimental scheme for the sale of cattle on a grade and dead weight basis was started in 1930. No effort was made to encourage the scheme beyond letting the agricultural community know that the facilities for sale on this basis were available at London and Birmingham. Such sales have therefore remained on a small scale.

The advantages of the scheme may be shortly stated as follows :—

- (1) Cattle proceed direct from the farm to the abattoir.
- (2) The price according to grade is determined before the cattle leave the farm.
- (3) The farmer is paid for the exact quality and weight of beef that he has produced.
- (4) The scheme shows the farmer the class of cattle in demand in each centre.
- (5) Insurance provisions cover the farmer against loss from carcase condemnation.

From the experience gained, it seems clear that the system is the best, if not the only satisfactory, way of selling cattle on description to a wholesaler at a distance, and there is no reason why it should not be extended in due course to all wholesale meat markets of any size. The experiments which have been carried out in 1933 on a similar scheme for the grading of lambs have been equally satisfactory. It is further probable that bulls, cows, ewes, pork pigs and sows could also be handled in a similar manner, and we recommend that the Ministry should press on with its investigations with this object.

99. It will be appreciated that the impartiality of the graders in a scheme of this kind is essential. They are, in effect, placed in a judicial capacity, and any idea that they were inclined to favour one side or the other would render the scheme unworkable. Bearing these facts in mind, it is doubtful whether graders appointed by the Board would receive the confidence of the wholesale trade to a sufficient extent. There is at any rate a strong case for keeping on the Government grading service for some years, in order not to

embarrass the Board at the outset by changing the present system and sacrificing the goodwill which the present grading system has built up.

Until recently no charge was made for the services of the Ministry's staff as intermediaries in the sale of beef on the grade and dead weight system, though a charge of 3d. per lamb was made in the experimental scheme. It is only right that a charge should be made for this commercial service, and the producer could well afford to pay it since by direct consignment to the abattoir he will have escaped other marketing costs. The fees received by the Board could be set off against the expenses of the National Mark service, for the additional service in respect of sale by grade or dead weight will involve little additional cost.

100. Sooner or later the system of sale by grade and dead weight will involve a certain amount of local organisation on the part of producers. At present, the head grader writes direct to farmers, but with any considerable extension of the scheme it is to be presumed that local agents of the Board would be required to bulk consignments and to organise the sale by grade and dead weight of stock surplus to the requirements of the neighbourhood. It seems unnecessary, however, to discuss at this stage what form of local organisation would be required.

101. *Grade and dead weight sales v. commission sales.*—Theoretically there should not be much difference between the results of sales by grade and dead weight and sales on commission but also on dead weight by farmers or dealers to wholesalers on meat markets. In the one case, the farmer is bid a price which the wholesaler estimates will leave a sufficient margin for his, the wholesaler's, expenses and profit. In the other, the farmer or dealer receives, or should receive, the sum actually realised, less the commission charge. In practice, however, there are various aspects of commission selling which make it an unsatisfactory method of sale. Even in theory a comparison of the two systems reveals the advantages of the former; for example, the farmer selling by grade and dead weight gets his price quotation before the cattle leave the farm, and he is certain of being paid according to the quality of his stock, which is not so in the case of commission sales.

The real disadvantages of the commission system lie partly in the fact that farmers selling on a commission basis are insufficiently protected, so that an intermediary is almost inevitable, partly in the practice of commission salesmen handling their own meat as well, and partly in the fact that with commission selling there is an incentive for each salesman to attract as heavy supplies as possible without regard to the state of the market.

The farmer who sells on a commission basis is insufficiently protected, primarily because he is not well enough in touch with

the market to select the best moment to sell there. But, in addition, he has no security that the commission man to whom he has consigned his supplies may not be already over-stocked for that day's trade and may not have to job the meat to some other salesman. It is true that dealers are to some extent exposed to the same risk, but to a slighter degree, and in their case what they lose on one day they may make up on another, whereas the farmers may have no more stock to send. Farmers also maintain that they have no real certainty that they are credited with the correct weights or that the sales are genuine in all cases.

In consequence, commission selling is recognised as the dealer's method of sale. From his point of view it may not work too badly. He is usually in close touch with the salesmen, knows the prices they expect to make, and regulates his buying accordingly. However, even he sometimes complains that on a falling market commission meat comes off worst. This is particularly the case where, as in many provincial markets, salesmen handle their own meat as well as commission meat. When a fall occurs, it is usually the case that the commission meat is sacrificed.

The information which the salesman gives to the dealer has no doubt some effect in guiding the latter not only as to the price he can afford to bid, but also as to quantities which the market can absorb. This form of regulating the amount of supplies is, however, haphazard in the extreme. With the present lack of organisation of marketing, supplies and prices in local markets are constantly varying. As soon as the dealer finds a cheap lot—judged by what he anticipates market prices on the central markets will be—he has every inducement to buy it and send it in, regardless of the supplies coming in from other sources. It would obviously be a much sounder principle if the wholesalers on a market exercised more direct control, and, as in the case of the imported trade, pitched only such amounts as the market required.

There does not seem to be any particular reason why grade and dead weight sales should not in course of time supersede commission selling on the provincial wholesale meat markets. Though the amount of commission selling varies, the major part of the trade in these markets is already by outright purchase. When commission selling and sale by grade and dead weight operate on the same market, the latter system attracts the wholesaler, not only because it saves him buying expenses, but because it tends to attract a good quality of supplies. Senders on this basis know that, as they are to be paid on quality and weight, they will derive most benefit if they send in good class well-finished live stock. On the other hand, as the system becomes better known to the farmer, it is reasonable to expect that he will make increasing use of it, and in consequence the supplies available to the dealer for commission sales will diminish.

The problem of replacing commission selling by grade and dead

weight sales on the London market is more difficult. So far as the home-killed trade in beef is concerned, it would not be a great change for the London wholesalers to buy, on the grade and dead weight basis, that portion of their supplies which to-day they obtain by purchase at country markets. As regards mutton and lamb, the difficulty is that London appears to be the surplus market for many distant localities. Besides obtaining a proportion from nearer districts, such as Kent, Sussex, Norfolk and the Midlands, it draws large supplies from Devonshire, the north of England and Scotland. It would require a complete change of system in this trade to do away with commission sales. Further, while at present the sale by grade and dead weight of mutton and lamb is based on the slaughter and grading being carried out at the buyer's end, it may be more economical in the case of the distant centres of supply for slaughter to take place locally because of the differential railway rate in favour of the carriage of carcasses of sheep, and because live sheep travel so badly. Thus, the grade and dead weight system might have to be modified. It is possible that carcasses could be graded at the wholesale meat market in spite of the congestion there, but, if not, the market wholesaler would have to quote for the grade without personal knowledge of the way in which the grading was carried on. This in itself would be a difficulty, since, in meat grading, so much depends on the buyers having personal knowledge of and complete confidence in the graders.

Nevertheless, a determination to progress in the direction of sales by grade and dead weight in place of commission selling seems to be called for. The market men in the home-killed trade have always deplored the lack of any control over the amount of supplies pitched, and it would appear that the solution lies along the line of increasing grade and dead weight sales. The time seems ripe for a campaign with this object and this, we think, should receive the attention of the Live Stock Marketing Board at the earliest opportunity.

102. Canning as a surplus outlet.—It has been suggested that one of the chief causes of the low prices for cattle has been the depressing influence of heavy supplies of low-grade beef (cow and bull beef) on the market, and that considerable improvement in the general level of home-killed meat prices could be effected if such supplies could be diverted from the fresh meat market by canning. We have been at some pains to ascertain whether this project is feasible, and regret that, in the opinion of persons actually engaged in the canning industry, whom we have consulted, the canning of low-grade beef would not be an economic proposition, even if prices of the foreign product were at a much higher level than they are to-day. Moreover, if any substantial development in canning took place, the present difficulty of obtaining adequate and regular supplies of low grade beef at a suitable price would be so

enhanced by competition for the limited supplies available as to become an insuperable obstacle to the canners.

103. Carcase insurance.—We consider that the present state of affairs as regards insurance against the risks of carcase condemnation is unsatisfactory. We appreciate that the problem is rendered difficult by reason of the fact that the degree of risk varies in different parts of the country: nevertheless, we think that a national scheme of carcase insurance, which should recognise those differences, is desirable and have provided the Board with powers to undertake insurance. But we do not recommend the immediate adoption of a compulsory scheme. We consider that the Board should give this matter careful thought with a view to working out, in co-operation with the various parties concerned, a system of insurance which is suitable to the widely divergent conditions prevailing in the country as a whole, bearing in mind the possibility that, unless provision is made for “no-claim rebates,” insurance tends to remove the incentive to the eradication of disease.

104. Smithfield Market.—While, over the country as a whole, the proportion of home-killed to imported meat is roughly 50–50, on Smithfield Market home-killed meat represents only about 20 per cent. of the total supplies. Indeed the supplies of beef from cattle actually fed in England and Wales are less than 10 per cent. of the total supplies. London being a port, it is perhaps natural that the offerings of imported meat at Smithfield should be relatively heavy, but we are satisfied that much might be done to improve the market for home-killed meat. As regards beef, the home-killed trade undoubtedly is at a disadvantage in that the London Public Abattoir at Islington is a considerable distance from Smithfield, a fact which necessitates heavy charges for transport and, under present arrangements, excessive handling of the meat. Indeed we are informed that, owing to the bad lay-out and construction of Islington and to the excessive handling, London-killed meat is, on the average, pitched on the market in less good condition than the supplies from Scotland and Birkenhead which come by rail. We suggest that some of these difficulties might be overcome by the modernisation of the Islington Abattoir, a matter which, we understand, is under consideration and to which we attach the very greatest importance. The ideal arrangement is for the abattoir to adjoin the meat market, and London, the largest consuming centre in the world, offers an unique opportunity of realising the advantages of this arrangement, coupled with slaughtering and distributing facilities founded on modern principles. We recommend that the Corporation of the City of London be asked to enquire into the possibility of evolving a scheme on these lines.

105. Publicity.—We consider that the adoption of the suggestions we have made for improved slaughtering facilities, for the wider use of standard grades and marks, and for improvements in production,

will put the home producer in a stronger position to compete with the oversea supplier by raising the general level of quality and palatability of home-fed meat offered to consumers. We have given the Board power to help the home producer in this respect by means of advertisement, and we think the publicity work of the Board should take the form of educating the consumer. There is at present insufficient realisation by the public of the merits of home-fed meat and we are satisfied that much wholesome meat is difficult to sell even at low prices, largely because housewives are not aware of the food value of the cheaper joints and because considerable trouble and knowledge are required to turn them into palatable dishes. As an example, there is a large trade in Scotland for minced fresh meat, made and sold by butchers, which is both easily cooked and palatable: this trade might be developed in England. We suggest, therefore, that the Board should explore, in conjunction with the retail trade, the possibilities of educative work on these lines—of which there is an excellent example in the activities of the New Zealand Meat Producers' Board. There is no doubt that a small increase in the demand for home-killed meat would have a great effect in improving the position of the industry.

PART VII.—PORK PIGS.

106. **Pork pigs included in Scheme.**—Separate consideration of pork pig problems is necessitated both by the characteristics of the pig and because there is already a Pigs Marketing Board in existence, which, however, only regulates the marketing of bacon pigs. We have considered whether to recommend that the Pigs Marketing Scheme should be absorbed into a Live Stock Marketing Scheme, but we do not think it would be wise to disturb the organisation of the bacon industry which we understand is shortly to be completed by the creation of a Development Board.

We have considered also whether to recommend the amendment of the Pigs Marketing Scheme so that it would take over the regulation of the marketing of all pigs; we have decided to make no such recommendation because we wish to preserve the insulated unity of the bacon industry and because we do not wish to duplicate the intelligence service, which will need to obtain census, forecast and other records of pork pigs as well as of cattle and sheep.

We are advised that there is nothing in the Agricultural Marketing Acts which will prevent the regulated product of a Live Stock Marketing Scheme from including pigs, in spite of the fact that there is already a Pigs Marketing Scheme in operation, and we have drawn our Scheme accordingly.

107. Regulation of home-produced supplies.—The two characteristics of the pig which make it different from cattle and sheep are its prolificacy and the rapidity with which it reaches slaughtering weight. It is also important to recognise that the volume of pork production is not directly dependent on acreage. On the marketing side the significant factors are the existence of two alternative markets, i.e., the bacon market and the pork market, and the wide range of weights (60-210 lb. dead weight) over which pigs are slaughtered. These characteristics combine to suggest that the volume of pork supplies is capable of very great variation within a short period, and that this variation might upset the stability of the beef and mutton markets. It has, however, been estimated that in recent years home-produced pork has represented only about 8 per cent. to 9 per cent. of the total supplies of butchers' meat in this country; thus an increase or decrease in pork production of as much as 50 per cent. would only affect total meat supplies by 4 per cent. to 5 per cent. An increase of these dimensions is within the bounds of practicability, particularly if our increasing bacon output is accompanied, not by a transfer of pigs from the pork to the bacon market, but by an increase in breeding stock. It is difficult to assess what would be its effect on the meat market, but its effect on pork prices could hardly fail to be very serious. Moreover, the danger of other meat prices being affected is sufficiently great that, even if it were not thought necessary to safeguard the interests of the pork market, the Board should be ready to deal with large variations in the pork pig output, in the interests of the cattle and sheep industries.

It is clearly important that the Board's intelligence system should be good; we therefore advocate a half-yearly pig census and quarterly pig forecasts—see Appendix B. From a study of the half-yearly census and quarterly forecast figures and of the numbers of pigs contracted to be sold to bacon curers, it should be possible for the Live Stock Marketing Board to know in advance if an over-supply of the pork market is probable, to estimate with reasonable accuracy the extent of that over-supply and to form a responsible opinion as to the effect that over-supply is likely to have on the meat market generally.

It can be assumed that the Board will so organise its intelligence service as to ensure that it will have adequate warning of any increase in the supply of pork pigs, but what then? We think that there is to-day scope for an increase in the pig population of this country but that, beyond this reasonable increase, which may in the interests of elasticity be useful, surplus-control operations may be necessary. Whatever method is used should be designed to discourage and not to encourage the production of future surpluses, bearing in mind that any scheme which causes the surplus to be absorbed at an economic price to the producer implicitly encourages further surpluses.

108. Regulation of imports.—Statistics of the pork import trade are given in Tables V, VI, VIII and IX. Live pigs are only imported from the Irish Free State (see Table III). The volume of imported live pigs or of imported pork which can be converted into bacon in the United Kingdom is now regulated, but so far there has been no quantitative regulation of pork imports other than of salt pork. There is also an embargo, for veterinary reasons, on the importation of live pigs and fresh pork from the Continent, and supplies from the Irish Free State are subject to an import duty. Home production represents about 80 per cent. of total pork supplies.

Having regard to these facts and to the probability that there will be fluctuations in the future home output of pork pigs, we advocate a policy of regulating imports of live pork pigs and carcasses without regard to short period fluctuations in the home output. The object of the policy, insofar as treaty obligations permit, should be to maintain such imports for an initial period at the level of a selected past period, or at a percentage of that level if the Government are satisfied at the time when the system is introduced that there has occurred an increase of some permanence in the home output as compared with the past few years. It is suggested that subsequently the volume of imports to be admitted should be reviewed at intervals of, say, 2 years in the light of all available information regarding demand and the home output, ignoring fluctuations in the latter.

109. Seasonality of pork supplies.—The seasonal supply and the price situation for the average of the years 1927 to 1931 are shown in index form in the following table :—

	Home-killed Supplies.	Total Supplies.	Home-killed Pork Prices.
January	107	107	110
February	96	98	110
March	99	99	110
April	82	84	108
May	71	73	100
June	55	57	92
July	54	58	89
August	63	64	90
September	99	98	96
October	133	131	98
November	135	134	97
December	206	197	100

It will be seen from these figures that, in the case of pork, supply and demand have in the past been well equated, and that the seasonal curves of supplies and prices follow each other closely. If the seasonal supply curve for pork is not affected by the Bacon and Pigs Schemes, then there would appear to be little advantage in suggesting

any seasonal modification in the volume of imports. It is, however, impossible to forecast the effect of the Bacon Scheme on the future seasonality of the pork supply, and we can only call attention to the present satisfactory equation of pork supply and demand, and suggest that, if the effect of the Bacon Scheme is to disturb this equilibrium, it may be desirable to give a seasonal bias to any policy of pork import regulation.

PART VIII.—EXPLANATION OF SCHEME.

(N.B.—*The references relate to the paragraphs in the draft scheme.*)

110. We have prepared a Scheme, under the Agricultural Marketing Acts, 1931 and 1933, for regulating the marketing of live stock in England and Wales ; this Scheme is printed as Appendix A to our report. In some of the following paragraphs an explanation is given of certain features of our Scheme ; in others we make recommendations regarding the manner in which certain powers should or should not be used.

111. **Constitution of Board and method of election** (paragraph 6 and Parts VIII and IX).—We suggest that the Board should consist of fifteen district members and three special members in addition to the two members to be co-opted under Section 14 of the Agricultural Marketing Act, 1933. In order to make it easier for all producers to vote for their district representatives and to preserve the principle of local representation, we have devised a new method of election. We suggest that there should be district committees consisting of representatives of the sub-districts set out in the First Schedule. Registered producers will elect, by post, their sub-district representatives on the district committee, and the latter committee will select the district representatives upon the Board. This method will do away with the need for district meetings involving producers in long journeys and will enable producers to elect as sub-district representatives men who are personally known to them.

We have also sought to discover an acceptable alternative to the general meeting for the election of special members. Special members of the Board should be persons qualified to take a broad view of their responsibilities ; they should generally represent neither sectional nor territorial interests ; they will frequently, but need not necessarily, themselves be producers : above all they should have administrative ability and sound judgment. We consider that the method of election of special members should be one that permits the most responsible and best informed producers to consider calmly the merits of possible candidates. We have therefore adopted the method invented by the Scottish Reorganisation Commission for Fat Stock and propose (Part IX) that special

members should be elected by all members of district committees in joint meeting. The seven district committees comprise 202 individuals and we should have preferred a smaller electorate, but we have been advised that the Acts impose rather strict limitations on our choice of method.

112. Executive Committee (paragraph 13).—We have defined the powers of the Executive Committee in a way which should facilitate day-to-day administration while leaving ultimate control in the hands of the Board.

113. Voting power and contributions.—The Act requires, for the purposes of the initial poll, that every Scheme shall define how "capacity to produce" the regulated product shall be assessed. We think that the method of assessment which governs voting strength should also be adopted for the determination of the individual producer's contribution to the Board's funds (paragraph 48).

We have searched for a method of assessment which is both fair and administratively simple, having regard to the fact that the regulated product is not one product but comprises several products.

Rental values are no guide to the producer's live stock output. To base the assessment on sales is administratively complicated. It therefore seemed best to regard the stock on each farm at given dates as reflecting the productive capacity of that farmer. The existence of the two systems of grass feeding and arable farming make it necessary to select two dates which will, taken together, do justice to each system. Special treatment was required by sheep and lambs; here the problem was complicated by the fact that on neither of the two dates would there be on the farm any considerable proportion of the lamb crop of the lowland or arable farmers who produce early lambs, whereas on 4th June the lambs of the hill farmers would still be unsold; the hill producer's voting strength and contribution would, therefore, be assessed on a higher scale than those of the lowland farmer. It seemed, therefore, to be equitable to take only one date, namely, 4th December, as the measure of a producer's capacity to produce sheep and lambs; on this date on the majority of breeding farms there is little except breeding stock, while the winter feeders have their stock of feeding sheep on hand.

It is necessary to attach a unit value to each class of live stock for the purpose of assessing voting strength and contributions, and accordingly we have used the following formula (paragraph 82):—

Each cow in calf or in milk	...	...	4	units
Each heifer in calf	...	...	4	"
Each calf under 6 months	...	...	4	"
Each other head of cattle	...	...	10	"
Each pig	...	...	3	"
Each sheep or lamb	...	...	2	"

In this formula we have had regard to the dual interest of the dairy farmer in the beef industry ; not only does he produce, in the form of cow-beef, a large proportion of the total volume of home-killed beef but also he supplies the bulk of the calves for the cattle feeding industry. Nevertheless, both cow-beef and calves are by-products of milk production which is his main industry. We think that a ratio of 10 to 4 fairly represents the respective beef values of the different types of cattle. The ratio of 10 to 3 roughly reflects the carcase weights of a beast and a pig. Finally, we have valued sheep and lambs at 2 units because they are only to be assessed once a year, in December, whereas other classes of stock are being assessed twice a year, i.e., in June and December.

The problem of the collection of contributions by a regulatory board will always be difficult unless there is some natural collecting point, such as the bacon factory in the Pigs Scheme or the milk buyer in the Milk Scheme. For this reason, we should have preferred to have arranged for contributions from live stock producers to have been collected at the point of slaughter, despite the fact that slaughter takes place at some 16,000 different points. We are advised, however, that, while it would be possible legally to arrange for butchers to deduct on behalf of the Board the amount of the levy from the price paid in the case of direct purchases from producers, it would be contrary to the language and the intention of the Act to attempt to collect the levy in that way in cases where the butcher bought from an intermediary. In order that all contributions might be collected at the point of slaughter, it would be necessary to prohibit all sales of fat stock except to butchers ; even if such a proposal were practicable, it would restrict unnecessarily the producer's freedom to choose his channel of sale.

We fully realise the difficulty in practice of the alternative method which we have adopted but, for the reasons given above, it is the best that we can offer. We suggest, however, that the collection of contributions might be made easier if producers were allowed to authorise their auctioneer or other approved buyer to deduct their contribution from the price payable on their next sale or sales and to pay it over to the Board.

114. Chief marketing powers.—Part VI of the Scheme contains all the motive powers, the rest of the Scheme comprising machinery of one sort or another. It is from these paragraphs and in particular from paragraph 42 that the Board will derive its power to rationalise the marketing machine and, in case of need, to regulate the volume of sales.

115. Trading powers.—The wide trading powers which we have incorporated in paragraphs 44 and 45 of the Scheme may seem to need explanation. We do not propose that normally the Board should be a trading body ; in fact, the whole Scheme is designed to set up the Board as a regulating body. We have included

the trading powers solely for use in an emergency and in conditions such as those described in paragraph 53 of our Report. We should deprecate most strongly the use of these powers in any attempt to raise the general level of prices by artificial means, viz., in connection with "upset" prices—see also paragraph 33 of our Report.

116. Credit.—Adequate credit facilities are an important element in the structure of the home live stock industry. Farmers' credit is now derived from banks, auctioneers, and live stock and farm requisite dealers, and the cost of credit derived from some of these sources is unnecessarily high; furthermore, the credit resources of farmers have been seriously depleted as a result of the prolonged agricultural depression.

We do not think our Scheme will disturb the credit facilities now open to farmers but paragraph 46 of the Scheme gives the Live Stock Board power to make advances to producers either by direct loan or by guaranteeing chattel mortgages under Part II of the Agricultural Credits Act, 1928. The giving of credit is a question which the Board must approach with caution, and we do not think that it should contemplate the use of this power in the immediate future. Nevertheless from the very start of the Scheme the Board should watch the credit position carefully in order to have early knowledge as to whether its intervention was necessary, and if so, in what way. We think that the Board should have a study made on the spot of live stock credit schemes in other countries even though farming and financial systems in those countries may not be similar to our own. Because a field organisation for maintaining contact with individuals and for tracing the movement of stock is a necessary part of any credit structure, the Board should examine how far its intelligence system could be adapted for these purposes. Finally, the Board should consult with the Banks as to how the system of individual chattel mortgage guaranteed by the Board could be made effective and brought into more general use.

PART IX.—SUMMARY OF RECOMMENDATIONS.

(N.B.—*The references in the text relate to previous paragraphs of the Report.*)

117. **Scope of recommendations.**—Our main proposals can be grouped into three broad categories, viz. :—

- (a) those for restoring remunerative prices to the live stock producers of Great Britain ;
- (b) those for establishing an efficient system of marketing live stock ;
- (c) those for raising the quality level of home-produced live stock and meat.

118. **Prices and supplies.**

(i) *The problem of low prices.*—Our study of the meat supplies of Great Britain has shown that the downward course of live stock and meat prices (20) has been closely associated with the rapid increase of meat imports in recent years, an increase which was accelerated with devastating effects on the meat market generally in 1931 and 1932 (Table IV). There is no room for doubt that prices of live stock have been at a level which threatens the existence of this key feature of the country's agriculture.

(ii) *The problem of the autumn glut.*—We appreciate that the tendency towards over-supply has been enhanced in the autumn months by the seasonal increase (7 *et. seq.*) in the supply of home-fed—and often poorly fattened—stock (14). In our view the restoration of healthy market conditions for all live stock in the autumn is primarily a question of reducing the pressure of supplies on the beef market (14).

(iii) *Steps already taken.* We have enumerated (15 *et seq.*) the steps taken by His Majesty's Government in developing its policy of quantitative regulation of meat and have drawn attention to some of the difficulties experienced in the application of that policy, particularly in regard to beef (20 and 21).

(iv) *Regulation of supplies.*—We recommend :—

- (a) that imports of all classes of meat and live stock, irrespective of origin, should be regulated (22) and that the machinery of regulation should be tightened up (23) ;
- (b) that the Government should lose no time in opening discussion on the supply situation with the Dominions (22) ;
- (c) that the estimate of the volume of home-produced meat, which will be a factor in determining the maximum of imported supplies, should be prepared on the basis of a half-yearly census of all live stock and a quarterly forecast of sales for slaughter (26 and 37) ;

(d) that the total quantities of meat should be so regulated as to ensure stable conditions in the Great Britain market (26) ;

(e) that, in the application of this policy, special steps should be taken to provide an outlet for home-fed beef in the autumn, provided, however, that the normal price incentive to winter feeding is not thereby destroyed (29) ;

(f) that, as regards pork pigs, imports should be stabilised for periods of, say, two years and that the Board should make plans to minimise fluctuations in the supply of pork due to short-period changes in home-produced supplies (108) ; and

(g) that it is unnecessary to attempt to regulate releases from cold store (24).

(v) From the enquiries we have made, we conclude that the full benefit of higher prices will not accrue to the home producer without greater efficiency primarily in the field of marketing, but also in the production of live stock and its preparation for sale as meat (33 and 81).

119. Marketing.

(vi) *One Scheme for Great Britain.*—Although in accordance with our terms of reference we have drafted a Scheme applicable to England only, we hope that producers in Scotland and England will see the wisdom of adopting one Scheme for the whole of Great Britain (2).

(vii) *A Live Stock Scheme.*—We recommend a Scheme to cover all live stock (and not merely fat stock), partly because we have been unable to discover an adequate definition of the term “ fat stock ” but mainly because we are satisfied that the efficiency measures we recommend are equally required for and applicable to store stock and to fat stock (32).

(viii) “ *Upset* ” prices.—We reject the principle of “ upset ” prices as a means of assisting the industry (33).

(ix) *Rationalisation to be gradual.*—Our marketing proposals are evolutionary in character (65) ; we propose the retention of the existing structure (38), but suggest means whereby the Live Stock Marketing Board, by a process of rationalisation of the channels of sale, may secure for the producer his full share of the market price. This involves in the main the reduction of the number of selling points, the codification of trade practices and the provision of adequate market intelligence (38). In our view market efficiency should be sought through co-operation between the Board and all parties engaged in the sale and distribution of live stock and meat (43).

(x) *Regulation of the rate of marketing.*—We have given the Board power to regulate the rate of marketing (52). But we believe that the rationalisation of the marketing structure and the provision

of a really efficient intelligence service will normally render unnecessary the active intervention of the Board. This power is therefore incorporated for use only in cases of emergency.

(xi) *Freedom of choice of method of sale.*—Under our Scheme the producer would be free to choose his own method of selling but sales would only be permitted (42) to other producers or to or through persons* approved by the Board after consultation with the organisation representing the class of person concerned (45, 54, 56 and 58). Our proposals are, however, designed to encourage sales of live stock generally at public auction and sales of fat stock direct to the meat market on a grade and dead weight basis (60).

(xii) *Sales at auction.*—We recommend that the Board should maintain a list of approved auction centres (45), sales by auction elsewhere being prohibited. In order to secure regular supplies to market, every producer should be required to select an approved centre for each class of live stock he wishes to be sold by auction (47) and to give the Board seven days' notice of his intention to offer for sale on a particular day (48). Provision is made for late entries and withdrawals (49) and also for the producer to change his selected auction (47).

The Board should have power to limit the number of entries at any particular market or at all markets (52) and to buy live stock in order to break a ring (53), but we strongly deprecate the use of these powers with a view to establishing artificial price levels.

(xiii) *Sales to butchers and through commission salesmen.*—We recommend that sales on the dead meat market should be effected normally without prior notification to the Board of intended offerings for sale. We think it is unnecessary for farmers to select any particular centre for such sales (57).

We believe that the practice of selling direct to butchers "by the head" is not in the farmer's interest since generally the butcher is a better judge of the dead weight at which an animal will kill out and is better informed as to trends of prices on the meat market. We recommend that all such sales should be on a dead weight basis but recognise that in the case of sales to the small village butcher this may not be practicable (54). In such cases, however, the record of the transaction which the butcher will be required to furnish to the farmer for transmission to the Board should be in terms of dead weight (54). Similar conditions will govern sales through dead meat commission salesmen (56).

(xiv) *Sales to dealers.*—We believe that the large dealer performs a very useful function but that some classes of farm sales to dealers are contrary to the interests of producers (41). We have therefore provided the Board with powers to control such sales in areas where their prevalence threatens other marketing channels which

* Auctioneers, dealers, butchers, dead meat commission salesmen.

the Board desires to encourage (60); all private treaty sales to dealers should be notified to the Board (59).

(xv) *Sales to other farmers.*—We contemplate that the Board will not interfere with such sales beyond requiring to be furnished with details of the transactions (61).

(xvi) *Specially approved marketing centres.*—We include in this class such agricultural shows, old-established fairs, private treaty markets and special sales as are approved by the Board. In these cases we consider that the Board should be informed of all transactions immediately after the event but that otherwise sales should be free of formality (62).

(xvii) *Conditions of approval.*—We recommend that the conditions of approval of the various classes of approved persons should be drawn up by the Board in close co-operation with the organisations representing the interests concerned (43). It will be noted that, while the existing channels of sale are retained, it is intended that, through the system of approval, those channels shall be cleared of obstructions in order to facilitate the flow of supplies to the consumer.

(xviii) *Exemptions :—*

(a) *From the Scheme.*—We recommend the exemption from the Scheme of producers whose pasture land does not exceed five acres and whose sales are inconsiderable (63).

(b) *From the marketing provisions.*—We suggest the exemption from the marketing provisions of the Scheme (but not from the intelligence provisions) of sales of pigs under the Pigs Marketing Scheme, and of sales of dairy stock. In addition the Board should have power to exempt from those provisions such other classes of sale as they think fit (64).

(xix) *Market Intelligence.*—An efficient market intelligence service is fundamental to the success of the programme we propose and we sketch in some detail the sort of service which we think should be established (66 *et seq.*). The Board will receive notifications of intended offerings at auction and will publish the anticipated pitchings at all markets in time to be of service to producers, buyers, transport undertakings, etc. It will also receive particulars of all sales of live stock, whether at market or privately, and detailed market reports from the meat markets, and will publish summaries thereof. In addition it will keep itself closely informed of crop and pasture conditions, supply conditions abroad and the trend of demand at home.

120. Live stock production.

(xx) We recommend that the Board should take active steps to raise the level of production efficiency in the live stock industry (81) with particular reference to improvement of grassland (82).

In conjunction with the Ministry of Agriculture and the Marketing Boards for Milk and Pigs it should work out a suitable breeding policy (85 and 91) and should educate producers in the technique of feeding to secure early maturing animals suitable to market requirements (84). There is also scope for the reduction of losses from disease (86) and from warble fly infection (89).

(xxi) We propose that the Board should have powers to promote and conduct education and research. Similar powers have been incorporated in other schemes and it seems essential that the Marketing Boards should have those powers. There is, however, already in existence a national system of research and education in agriculture and the initiation of additional educational and research work by the various Boards might lead to overlapping and waste of public funds. We suggest the appointment of a committee to consider what modifications, if any, of the present national system of education and research are required in view of the new organisation of agriculture on a commodity basis (93).

(xxii) *Credit*.—We have given the Board power to provide credit to producers but we suggest that it should examine the situation very carefully before embarking on a credit scheme (116).

121. Dead meat : Efficiency measures.

(xxiii) *Centralisation of slaughtering*.—We consider that further centralisation of slaughtering facilities is inevitable and desirable in the interests of the home live stock and meat industry, but we think the development should follow a long-range plan. To this end we recommend the establishment of a National Slaughterhouses Commission as an advisory and planning, but not executive, body which would initiate proposals for the erection of large scale slaughterhouses, plan zones of operation and co-ordinate all abattoir schemes submitted to it (95). Since schemes of centralisation, to be effective, must involve the closing of private slaughterhouses we recommend that statutory provision should be made for the compulsory closure of such slaughterhouses with compensation limited to the amount of loss, if any, actually suffered (95).

(xxiv) *National Mark*.—We are satisfied that the National Mark Scheme for beef has been of great benefit to the live stock and meat industry and to consumers and we recommend its extension to new areas and the application of the Mark to other classes of home-fed meat. We think that, in order to retain the confidence of all branches of the meat trade, the actual grading should continue to be done by officers employed by the State (97), but the grading service should be paid for by the producer (through the Board).

(xxv) *Sales by grade and dead weight*.—Our study of this subject has convinced us that the grade and dead weight method of sale deserves every encouragement (98) and we have no doubt that as the system develops the Board will create the necessary

machinery for facilitating the transfer in bulk of stock for sale in this manner (100).

(xxvi) *Canning*.—We are informed by those engaged in the canning industry that there is no prospect in the immediate future of that industry becoming an economic outlet for surplus low-grade meat (102).

(xxvii) *Carcase insurance*.—We recommend that the Board should take steps to establish a comprehensive scheme of insurance against carcass condemnation, whilst still leaving an incentive to the eradication of disease (103).

(xxviii) *Smithfield Market*.—We draw attention to the inadequacy of the present facilities at Smithfield Market and Islington Abattoir and recommend that the City Corporation should consider their reconstruction, and if possible, their amalgamation on modern lines (104).

(xxix) *Publicity*.—We recommend that the Board should educate the public as to the merits of home-fed meat and in particular as to the nutritive value of the cheaper cuts and the means of utilising them (105).

122. Pork Pigs.

(xxx) In order to preserve intact the new organisation for the bacon industry we recommend that pork pigs should come within the Live Stock Marketing Scheme (106).

CONCLUDING OBSERVATIONS.

123. *Distribution*.—We have not attempted in this Report to examine the machinery or the costs of distributing meat, wholesale or retail, which hardly seems to be covered by our terms of reference, though we recognise the extreme importance of this subject. It is obvious that, in the case of meat no less than of other products, the costs of distribution represent a high proportion of the price paid by consumers and it is probable that for various reasons, the proportion has increased as compared with pre-War years.

In spite of its great importance in the national economy, there is a regrettable lack of basic data as to the facts and technique of distribution. Information is required as to the number of establishments engaged in wholesale and retail distribution according to type and location, the main commodities dealt in, turnover, persons employed, stocks, operating expenses, equipment, credit practice and so on. If ascertained at regular intervals, it would enable the tendencies in the general distributive structure to be noted

and assessed. The value of the information would, however, largely depend on its comprehensiveness which suggests that a Census of Distribution is necessary.

So far as the distribution of food products is concerned, the need for this information is specially urgent. Under the aegis of the Agricultural Marketing Acts, primary producers are now engaged in rebuilding their industry on new and rationally planned foundations. The creation of producer-controlled organisations of national scope and importance must inevitably have a profound reaction throughout the whole distributive system, and it is important to establish, as soon as possible, an effective and harmonious co-ordination between them and the system which distributes their goods. This cannot be done satisfactorily without far more knowledge of the distributive mechanism than is available to-day.

There is another aspect of the question which should be emphasised. One of the main objectives of the new system for agriculture is the regulation of market supply. It is obvious that the scientific analysis of demand and a detailed knowledge of the quantitative requirements of the market-area according to the various types and descriptions of commodities supplied are essential to the intelligent regulation of the volume of supplies offered to the market.

The collection of comprehensive data on these lines would represent a task of great magnitude. It would also be an entirely new departure so far as this country is concerned. We are not in a position to suggest the precise lines which such a Census of Distribution should follow or the dividing line between a census proper and more specialised investigations. Nevertheless, changes in the marketing structure are being made so rapidly that we recommend that a start should be made at once with selected food trades among which those concerned with the distribution of meat and meat products should certainly be included.

124. Co-ordination of the various Marketing Boards.—It is clear that the Live Stock Board will need to be in close contact with the Milk Boards and the Pigs Board and with the comparable authorities in Northern Ireland. It seems probably inevitable that some machinery should be set up to co-ordinate the activities of the different Marketing Boards. This machinery might take the form of a Central Council on which the various Boards should have representation. We do not suggest that this Council should have power in any way to override the authority of the individual Boards, but there is undoubtedly scope for the prevention of overlapping of functions, and the existence of the Council as a medium for the exchange of opinion might prove the means of anticipating and preventing conflict of policy.

125. Some policy considerations.—The plan which we present in our report is based on a comprehensive scheme of internal marketing

reorganisation and import regulation as required of us by the minute of our appointment. It is framed primarily in the interest of the home producer, and on the basis of the Agricultural Marketing Acts of 1931 and 1933.

But the consideration which we have given to the problems before us has served to emphasise an aspect of the general position which must be insisted upon, viz., the interdependence of agricultural and industrial and trade interests in this country. Any attempt to substitute controlled marketing and import regulation for the ordinary processes of adjustment in an entirely free market must pay due regard to the paramount necessity of assuring to the masses of the population a sufficient supply of meat at prices which fall within their capacity to pay.

It is in the interest of the home producer that the disastrously low prices of recent years should be adjusted to a more reasonable level, but it is also in his interest that his product should be purchased freely and to an increasing extent by the population of the cities. High prices induced by scarcity can be of no advantage to him in the long run : it must be his aim to turn out efficiently and at a lower cost of production an article which will attract an ever increasing circle of buyers in a market which is rationally organised.

We are emphatically opposed to any plan which would subsidise or assist inefficient production. Under modern conditions there is no room for the inefficient farmer.

In paragraph 30 we have indicated certain courses which it may be thought advisable to consider in the event of import regulation and internal market reorganisation failing to achieve the more stable conditions at which we aim. It is much to be hoped that such steps may not be required : but it is evidently impossible to estimate all the repercussions of so comprehensive a scheme and in our view, once the industry has entered on a period of regulation, it will be essential that the Government should be prepared with adequate powers to deal with emergencies which may arise. Our plan is conceived, as we have said, with the intention of achieving a better market for the home producer. Its success will carry with it improved conditions also for the oversea producer. But it is of vital importance that the machinery available under the Marketing Acts should not only assist the producer but should also protect the consumer against excessive prices of either home-produced or imported meat ; and, if it is found in practice to be inadequate, the Government will need to supplement it with further measures.

The execution of the plans which we have sketched out will demand a high degree of skill and foresight. Much will depend on finding the right men to control the organisation. Breadth of outlook will be required and a capacity to visualise the problem in a non-partisan spirit. The constitution of the Board and the

selection of its chief officials will therefore be a matter of first-class importance especially in view of the key-position held by the live stock industry in the rural economy of this country.

We have not suggested sensational remedies or startling changes. We have rather endeavoured to show how existing methods of production and marketing of live stock can be improved and why some should be discouraged.

And we believe that, with a new spirit of co-operation among all concerned, with better organised methods and with more shelter from unregulated imports, the live stock industry may well enter a new period of prosperity.

126. Finally, the Commission desire to express keen appreciation of the assistance rendered to us by the staff which the Minister of Agriculture placed at our disposal.

Our Secretary, Mr. J. B. Baber, has unrivalled experience of the work on which he has been engaged. We cannot too highly praise the ability and judgment which he has brought to bear on a very exacting task. Our Assistant Secretary, Mr. W. H. Wilkin, has been most capable and conscientious in the discharge of his duties. We have also received invaluable help from the Marketing Officers attached to the staff, namely Major W. H. Warman, Mr. J. Morgan Jones, Mr. W. J. B. Hopkinson, and Mr. A. N. Duckham, who unfortunately had to leave before the completion of our labours to take up the post of Secretary to the Pigs Marketing Board in Northern Ireland.

To all these Officers, we desire to express our personal gratitude for their unremitting efforts on our behalf and we think it fitting to bring this record to your notice.

We have the honour to be,

Sir,

Your obedient Servants,

BINGLEY, *Chairman.*

H. G. HOWITT.

J. B. LLOYD.

J. B. ORR.

JASPER RIDLEY.

J. BABER, *Secretary.*

HAROLD WILKIN, *Assistant Secretary.*

28th March, 1934.

NOTE.—In the following tables the statistics relating to home production are based on the results of the 1924–1925 Agricultural Census of Production, and will be subject to amendment on completion of the enquiries made in connection with the similar Census of 1930–31. Figures as to imports are taken from the monthly Trade and Navigation Accounts and the Annual Statements of Trade. Official estimates of home production of meat in 1933 are not yet available.

TABLE I.

Estimated value of the agricultural and horticultural produce sold off farms in England and Wales during the agricultural years 1926–27 to 1930–31.*

	1926–27.	1927–28.	1928–29.	1929–30.	1930–31.
	£000	£000	£000	£000	£000
Livestock	71,000	74,200	78,600	75,270	64,770
Milk and dairy produce	54,720	55,010	56,060	57,310	54,980
Poultry and eggs ...	15,100	15,940	16,900	18,690	17,770
Wool	3,170	3,850	2,760	1,800	1,140
Total ...	143,990	149,000	154,320	153,070	138,660
Farm crops (corn, potatoes, sugar beet, hops, hay, etc.) ...	47,840	47,720	43,120	37,620	36,430
Fruit, vegetables, flowers, etc. ...	20,860	23,860	23,930	25,540	21,660
Total of all produce ...	212,690	220,580	221,370	216,230	196,750

* Taken from Agricultural Statistics, 1931, Volume LXVI, Part I.

TABLE II.

Estimated number of animals sold off farms for slaughter and the estimated production of dressed meat from these animals in Great Britain during the calendar years 1927-32.*

Year.	Beef.		Veal.		Mutton and Lamb.		Pigmeat.	
	Nos. of Cattle.	Quantity of meat.	Nos. of Calves.	Quantity of meat.	Nos. of Sheep and Lambs.	Quantity of meat.	Nos. of Pigs.	Quantity of meat.
	000	000 <i>cwt.</i>	000	000 <i>cwt.</i>	000	000 <i>cwt.</i>	000	000 <i>cwt.</i>
1927	1,831	10,452	1,029	776	9,899	4,548	3,639	5,198
1928	1,889	10,779	1,030	778	10,105	4,639	4,171	5,959
1929	1,913	10,922	1,003	759	9,653	4,430	3,804	5,433
1930	1,859	10,621	932	705	9,025	4,139	3,397	4,853
1931	1,760	10,053	866	653	9,391	4,307	3,769	5,384
1932	1,710	9,762	873	660	10,733	4,928	4,350	6,214

* The estimates of meat do not include any allowance for edible offal. The figures are calculated on estimates for meat years June to May, by taking for the calendar year 1927 5/12ths of the estimates for 1926-27 and 7/12ths of the estimates for 1927-28, and so on.

TABLE III.

Estimated meat equivalent (including an allowance for edible offal) of fat animals landed in Great Britain, for slaughter, 1927-32.

Year.	Beef.			Mutton and Lamb.	Pigmeat.
	From N. Ireland and Irish Free State.	From Canada.	From S. Africa.	From N. Ireland and Irish Free State.	From N. Ireland and Irish Free State.
	000 <i>cwt.</i>	000 <i>cwt.</i>	000 <i>cwt.</i>	000 <i>cwt.</i>	000 <i>cwt.</i>
1927	1,859	40	1	321	575
1928	2,049	2	1	335	495
1929	2,155	—	4	328	444
1930	1,995	21	1	326	596
1931	1,846	148	3	340	714
1932	1,608	92	—	291	412

TABLE IV.
Net Meat Supplies of Great Britain, 1927-32.*

Year.	Beef.			Veal.			Mutton and Lamb.			Pigmeat.			All Meat.		
	Home-fed.	Import-ed.	Total.	Home-fed.	Import-ed.	Total.	Home-fed.	Import-ed.	Total.	Home-fed.	Import-ed.	Total.	Home-fed.	Import-ed.	Total.
	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>	<i>000</i> <i>cwt.</i>
1927	11,497	15,789	27,286	854	47	901	5,003	5,922	10,925	5,458	10,267	15,725	22,812	32,025	54,837
1928	11,857	15,039	26,896	856	80	936	5,103	6,053	11,156	6,257	10,799	17,056	24,073	31,971	56,044
1929	12,014	14,446	26,460	835	97	932	4,873	6,066	10,939	5,705	10,259	15,964	23,427	30,868	54,295
1930	11,683	14,494	26,177	775	110	885	4,553	6,846	11,399	5,096	11,374	16,470	22,107	32,824	54,931
1931	11,058	14,779	25,837	718	146	864	4,738	7,600	12,338	5,653	13,329	18,982	22,167	35,854	58,021
1932	10,738	13,665	24,403	726	137	863	5,421	7,375	12,796	6,525	13,285	19,810	23,410	34,462	57,872

* The import figures relate to the United Kingdom; separate figures for Great Britain are not available. The error involved is not likely to be significant.

The figures for home-fed meat include an allowance for edible offals, and have been calculated from estimates for years June to May on the basis of 5/12ths of one year plus 7/12ths of the following year.

TABLE V.

Average annual imports of dead meat (excluding canned meat and essences) into the United Kingdom in 1927-31 showing the countries of consignment.

Country of consignment.	Chilled beef.		Frozen beef.		Frozen mutton and lamb.		Pork.	
	Quantity.	Per cent. of Total.	Quantity.	Per cent. of Total.	Quantity.	Per cent. of Total.	Quantity.	Per cent. of Total.
	<i>000</i>		<i>000</i>		<i>000</i>		<i>000</i>	
	<i>cut.</i>		<i>cut.</i>		<i>cut.</i>		<i>cut.</i>	
Argentine Republic ...	8,486.0	89.05	928.0	35.30	1,519.7	25.12	67.0	9.80
Uruguay ...	673.4	7.06	220.5	8.40	359.0	5.93	(a)	(a)
Brazil ...	368.9	3.87	153.7	5.80	14.7	0.24	1.2	0.20
United States of America ...	(a)	(a)	49.8	1.90	1.3	0.02	75.9	11.10
Chile ...	(a)	(a)	(a)	(a)	310.7	5.13	(a)	(a)
Denmark ...	(a)	(a)	(a)	(a)	(a)	(a)	43.3	6.30
Other Foreign Countries ...	0.6	0.01	24.2	0.90	17.7	0.29	4.7	0.70
New Zealand ...	(b)	(b)	319.8	12.20	3,006.1	49.69	127.2	18.60
Australia ...	(b)	(b)	903.3	34.40	820.9	13.57	22.3	3.20
Canada ...	(b)	(b)	12.7	0.50	(b)	(b)	7.6	1.10
Irish Free State ...	(b)	(b)	(b)	(b)	(b)	(b)	334.7	48.90
Other British Countries ...	1.0	0.01	16.7	0.60	0.7	0.01	1.1	0.01
Total Foreign Countries ...	9,528.9	99.99	1,376.2	52.30	2,223.1	36.73	192.1	28.10
Total British Countries ...	1.0	0.01	1,252.5	47.70	3,827.7	63.27	492.9	71.90
Grand Total ...	9,529.9	100.00	2,628.7	100.00	6,050.8	100.00	685.0	100.00

(a) Not shown separately. Imports, if any, included in "Other Foreign Countries."

(b) Not shown separately. Imports, if any, included in "Other British Countries."

TABLE VI.
Analysis of supplies of butchers' meat.
(Average of 1927-31).

Description of Meat.	Quantities 000 cwt.	Percentage of total of class of meat.	Percentage of total of all meat.
BEEF AND VEAL—			
Home-fed cattle	12,430	46·4	29·1
Imported fat cattle*	2,025	7·6	4·8
Total home-killed	14,455	54·0	33·9
Imported, fresh and chilled	9,572	35·8	22·4
Imported, frozen	2,732	10·2	6·4
Total imported (dead)	12,304	46·0	28·8
Grand total beef and veal	26,759	100·0	62·7
MUTTON AND LAMB—			
Home-fed sheep and lambs	4,854	43·1	11·4
Imported fat sheep and lambs*	330	2·9	0·8
Total home-killed	5,184	46·0	12·2
Imported, fresh and frozen (dead)	6,076	54·0	14·2
Grand total mutton and lamb	11,260	100·0	26·4
PORK—			
Home-fed pigs	3,756	81·1	8·8
Imported fat pigs*	189	4·1	0·5
Total home-killed	3,945	85·2	9·3
Imported—			
Fresh Pork	335	7·2	0·8
Frozen „	290	6·3	0·7
Salted „	60	1·3	0·1
Total imported (dead)	685	14·8	1·6
Grand total pork	4,630	100·0	10·9
ALL BUTCHERS' MEAT—			
Total home-killed	23,584	55·3	55·4
Total imported (dead)	19,065	44·7	44·6
Grand total	42,649	100·0	100·0

*Estimated meat equivalent of fat animals imported into Great Britain from Canada, the Irish Free State and South Africa and including arrivals from Northern Ireland. An allowance has been made for the proportion of fat pigs converted into bacon.

TABLE VII.

Summary of conditions affecting the principal sources of the United Kingdom import trade in chilled beef.

Country of origin.	Average Imports into U.K. 1927-31.		Production conditions.	Slaughtering conditions.	Storage practice.	Arrivals in United Kingdom.*	Other remarks.
	Quantity 000 cwt.	Per cent. of imports of chilled beef.					
Brazil ...	370	3.9	Grass production, very seasonal.	Seasonal, following grass curve.	No storage ...	Extreme seasonal variations. Peak months April and May.	Supplies from year to year are rather irregular.
Uruguay ...	673	7.0	Grass production but less seasonal than in Brazil.	Ditto	Ditto	Considerable seasonal variations. Peak months June and July.	—
Argentina ...	3,486	89.0	Grass production practically the whole year round.	No definite seasonality. Rate of slaughter regulated to meet marketing conditions.	Ditto	Very regular, slightly heavier supplies in first 6 months. No definite peak or trough in supplies.	Supplies other than from Argentina are very small from August to December inclusive.

* Shipping space is allotted between the various interests in the chilled meat trade by the Freight Committee.

Country of origin.	Average Imports into U.K. 1927-31.		Production conditions.	Slaughtering conditions.	Storage practice.	Arrivals in United Kingdom.	Other remarks.
	Quantity <i>000 cwt.</i>	Per cent. of imports of frozen beef.					
Argentina ...	928	35.3	Same as for chilled beef. Frozen trade subsidiary to chilled beef trade.	Same as for chilled beef.	Little storage	Monthly supplies more irregular than for chilled beef, but no definite seasonal trend.	—
Uruguay ...	221	8.4	Same as for chilled beef.	Same as for chilled beef.	No definite information.	Seasonal variations less regular than for chilled beef. Tendency for supplies to be light from November to February.	—
Australia ...	903	34.4	Grass production, very seasonal.	Killing season March-August.	Limited amount of storage in early part of the season.	Very seasonal. Peak month usually comes in August and supplies are above the average till end of the year.	Trade not highly organised. Much of exported supply sold on contract.
New Zealand	320	12.2	Grass production. Beef production subsidiary to lamb production.	Peak comes in March - May, two months after peak in slaughtering of lambs and sheep.	Storage until the bulk of the lamb has been cleared and shipping space is available. Peak in storage of beef in May or June.	Considerable differences from year to year. Normally peak in May and another in July.	Marketing regulated by Meat Producers' Board.

TABLE VII (continued).

Summary of conditions affecting the principal sources of the United Kingdom import trade in mutton and lamb.

Country of origin.	Average Imports into U.K. 1927-31.		Production conditions.	Slaughtering conditions.	Storage practice.	Arrivals in United Kingdom.	Other remarks.
	Quantity 000 cwt.	Per cent. of imports of mutton and lamb.					
New Zealand	3,006	49.7	Grass production with a marked seasonal variation.	Killing season starts in November. Peak of lamb slaughtering in January and of sheep in February or March.	Stocks in store negligible from July to December. Peak of lamb storage in April; peak of mutton storage in May.	Seasonal variations very regular from year to year. Peak months April and July.	Marketing regulated by Meat Producers' Board.
Australia ...	821	13.6	Grass production season limited.	Killing season extends over period of 3 or 4 months from August or September onwards.	Large quantities put in store in September and October.	Very seasonal. Heavy supplies November to March with a peak in December.	Marketing not organised or subject to control.
Argentina ...	1,520	25.1	Grass production	Peak in slaughtering of lambs in December, though sometimes November. No marked seasonality in case of sheep.	Considerable storage of lamb in October, November and December.	Less seasonal than supplies of frozen beef; peak in May.	—
Uruguay ...	359	5.9	Grass production	Peak in October and November.	Some storage in first months of killing season.	Very seasonal, heavy supplies December to April.	—

TABLE VII (continued).

Summary of conditions affecting the sources of the United Kingdom import trade in fat cattle and sheep.

Product.	Country of origin.	Production conditions.	Arrivals.	Other remarks.
Fat cattle ...	Irish Free State ...	Grass production ...	Very seasonal, heavy supplies August to January.	—
Fat cattle ...	Canada	Grass and stall-fed, mostly latter.	Very seasonal, heavy supplies January to July.	These remarks apply to imports in 1924 to 1926. In recent years supplies have been intermittent.
Fat sheep ...	Irish Free State ...	Grass production ...	Fat lamb supplies concentrated in period May to August. Fat sheep very seasonal, peak in September and October.	—

TABLE VIII.
Estimated average monthly supplies of butchers' meat in Great Britain, 1927-31,
in thousand cwt.

Month.	Beef and Veal.			Mutton and Lamb.			Pork.			All Butchers' Meat.			Month.
	Home-killed.	Im-ported. (dead).	Total.	Home-killed.	Im-ported. (dead).	Total.	Home-killed.	Im-ported. (dead).	Total.	Home-killed.	Im-ported. (dead).	Grand Total.	
Jan. ...	1,362	1,070	2,432	397	418	815	351	62	413	2,110	1,550	3,660	Jan.
Feb. ...	1,157	948	2,105	337	406	743	316	63	379	1,810	1,417	3,227	Feb.
Mar. ...	1,204	1,066	2,260	337	595	932	324	60	384	1,865	1,711	3,576	Mar.
April ...	1,120	1,033	2,153	311	648	959	270	53	323	1,701	1,734	3,435	April.
May ...	1,048	1,075	2,123	367	708	1,075	232	50	282	1,647	1,833	3,480	May.
June ...	939	1,027	1,966	406	511	917	180	39	219	1,525	1,577	3,102	June.
July ...	999	1,045	2,044	467	659	1,126	179	44	223	1,645	1,748	3,393	July.
Aug. ...	1,120	1,060	2,180	536	496	1,032	208	38	246	1,864	1,594	3,458	Aug.
Sept. ...	1,241	1,013	2,254	558	439	997	325	55	380	2,124	1,507	3,631	Sept.
Oct. ...	1,410	1,040	2,450	553	402	955	439	65	504	2,402	1,507	3,909	Oct.
Nov. ...	1,458	920	2,378	492	383	875	444	72	516	2,394	1,375	3,769	Nov.
Dec. ...	1,397	1,017	2,414	423	411	834	677	84	761	2,497	1,512	4,009	Dec.
Total ...	14,455	12,304	26,759	5,184	6,076	11,260	3,945	685	4,630	23,584	19,065	42,649	Total
Monthly Average.	1,205	1,025	2,230	432	506	938	329	57	386	1,965	1,589	3,554	Monthly Average.

TABLE IX.

Indices of average seasonal variations in the estimated supplies of butchers' meat in Great Britain, 1927-31.
(Monthly average=100.)

Month.	Beef and Veal.			Mutton and Lamb.			Pork.			All Butchers' Meat.			Month.
	Home-killed.	Imported (dead).	Total.	Home-killed.	Imported (dead).	Total.	Home-killed.	Imported (dead).	Total.	Home-killed.	Imported (dead).	Grand Total.	
Jan.	113	104	109	92	82	87	107	109	107	107	98	103	Jan.
Feb.	96	92	94	78	80	79	96	110	98	92	89	91	Feb.
Mar.	100	103	102	78	118	99	99	105	99	95	108	101	Mar.
Apl.	93	101	97	72	128	102	82	93	84	87	109	97	Apl.
May	87	105	95	85	140	114	71	88	73	84	115	98	May
June	78	100	88	94	101	98	55	68	57	77	99	87	June
July	83	102	91	108	130	120	54	77	58	84	110	95	July
Aug.	93	103	98	124	98	110	63	67	64	95	100	97	Aug.
Sept.	103	99	101	129	87	106	99	96	98	108	95	102	Sept.
Oct.	117	102	110	128	79	102	133	114	131	122	95	110	Oct.
Nov.	121	90	107	114	76	94	135	126	134	122	87	106	Nov.
Dec.	116	99	108	98	81	89	206	147	197	127	95	113	Dec.
Monthly Average	100	100	100	100	100	100	100	100	100	100	100	100	Monthly Average

TABLE X.

Average monthly prices of home-killed and imported meat at certain wholesale markets in England and Wales, 1927-31.*
(pence per lb.)

Month.	English Beef (Longsides)	Argentine Chilled Beef.	Australian Frozen Beef.	British Veal.	English Mutton.	Australian Mutton.	English Lamb.	N. Zealand Lamb.	British Pork.	Month.
Jan. ...	8	5½	4½	11	10½	5½	12½	9½	11½	Jan.
Feb. ...	8½	5½	4½	11½	10½	5½	14½	9½	11½	Feb.
Mar. ...	8½	5½	4½	11½	11	5½	15½	9	11½	Mar.
Apr. ...	8½	5½	4½	11½	11½	5	17½	8½	11½	Apr.
May ...	8½	5½	4½	11½	11½	4½	16½	8½	10½	May.
June ...	9	5½	4½	11½	11½	5	13½	9½	9½	June.
July ...	8½	5½	4½	10½	10½	5	12½	9	9½	July.
Aug. ...	8½	6½	4½	10	10½	5	11½	9	9½	Aug.
Sept. ...	7½	5½	4½	10½	10½	5½	11	9	9½	Sept.
Oct. ...	7½	5½	4½	9½	9½	5	10½	9	10½	Oct.
Nov. ...	7½	5½	4½	9½	9½	4½	10½	8½	10	Nov.
Dec. ...	7½	5½	4½	10½	9½	4½	10½	8½	10½	Dec.
Monthly Average	8½	5½	4½	10½	10½	5	13	9	10½	Monthly Average.

* The prices are the average of 1st and 2nd quality meat (except for chilled and frozen beef, in which cases they are the average of 1st quality hind and fore quarters) at London, Leeds, Birmingham and Manchester markets.

TABLE XI.

Indices of the seasonal variation in the average monthly prices of home-killed and imported meat at certain wholesale markets in England and Wales, 1927-31.

(Monthly average=100.)

Month.	English Beef (Longsides)	Argentine Chilled Beef.	Australian Frozen Beef.	British Veal.	English Mutton.	Australian Mutton.	English Lamb.	N. Zealand Lamb.	British Pork.	Month.
Jan. ...	98	100	104	103	100	105	96	102	110	Jan.
Feb. ...	99	95	101	106	102	105	110	106	110	Feb.
Mar. ...	102	95	99	106	104	103	121	100	110	Mar.
Apr. ...	106	95	99	111	109	100	135	98	108	Apr.
May ...	107	97	99	108	110	95	124	99	100	May.
June ...	110	100	96	105	107	100	106	102	92	June.
July ...	106	102	97	95	100	100	95	100	89	July.
Aug. ...	102	108	101	93	97	100	88	100	90	Aug.
Sept. ...	96	104	101	94	95	103	85	100	96	Sept.
Oct. ...	92	102	101	90	92	100	80	100	98	Oct.
Nov. ...	89	102	101	92	91	95	78	96	97	Nov.
Dec. ...	93	100	99	97	93	93	82	95	100	Dec.
Monthly Average	100	100	100	100	100	100	100	100	100	Monthly Average

TABLE XII.

Summary of results of the live stock census taken on 4th June and 4th December, 1933, in England and Wales and a comparison of the variations in live stock population between these two dates with those which occurred between the live stock census taken on 4th June, 1929, and 11th January, 1930.

	June, 1933.	December, 1933.	Per cent. change between June and Dec., 1933.	Per cent. change between June, 1929, and Jan. 1930.
Cows and Heifers in Milk ...	2,179,000	1,962,400	} Not significant.	
Cows in Calf but not in Milk	358,200	670,800		
Heifers in Calf	418,000	440,400		
Total Dairy Stock ...	2,955,200	3,073,600	+ 4.0	+ 2.3
Bulls for Service	95,500	100,000	+ 4.7	+ 3.3
Other Cattle—				
2 years old and over ...	900,900	866,300	- 3.8	-10.8
1-2 years	1,356,900	1,283,300	- 5.4	- 7.6
Under 1 year	1,311,700	1,331,700	+ 1.5	- 6.0
Total Cattle	6,620,200	6,654,900	+ 0.5	- 3.25
Ewes kept for breeding ...	7,767,900	8,145,600	+ 4.9	+ 6.0
Rams and Ram Lambs ...	226,800	265,300	+17.0	+11.3
Other sheep—				
Under 6 months	} Not available	423,000		Not available.
6-12 months ...		3,505,100		
Total under 12 months		7,898,000	3,928,100	-50.3	-50.4
Over 12 months ...	2,197,200	727,400	-66.9	-46.2
Total Sheep	18,089,900	13,066,400	-27.8	-25.6
Sows kept for breeding ...	405,600	} No information sought.		
Boars... ..	28,700			
Other Pigs—				
Under 2 months ...	819,400			
2 months and over ...	1,815,400			
Total Pigs	3,069,100			

APPENDIX A.

DRAFT SCHEME UNDER THE AGRICULTURAL MARKETING ACT, 1931, REGULATING THE MARKETING OF CATTLE, SHEEP AND PIGS.

PART I.—PRELIMINARY.

1. This Scheme may be cited as the Live Stock (England) Marketing Scheme, 1934, and applies to England.
2. In this Scheme, except where the context otherwise requires—
 - “The Act” means the Agricultural Marketing Act, 1931, as amended by any subsequent Act.
 - “The Act of 1933” means the Agricultural Marketing Act, 1933;
 - “Live stock” means cattle, sheep or pigs, being cattle, sheep or pigs produced in England;
 - “Animal” includes only such animals as are live stock;
 - “Heifer” means a female bovine animal which has never calved;
 - “Calendar year” means a period of twelve months beginning on the first day of January;
 - “District” and “sub-district” mean respectively one of the districts or sub-districts specified in the First Schedule to this Scheme;
 - “Committee” means one of the committees mentioned in Part II of this Scheme;
 - “Producer” means a producer of live stock;
 - “Registered” means registered under this Scheme, and “registration” shall be construed accordingly;
 - “Secretary” in relation to the Board or any committee means a person appointed by the Board to be, or a person for the time being authorised by the Board to act as, Secretary of the Board or committee.
3. The Interpretation Act, 1889, shall apply for the interpretation of this Scheme as it applies for the interpretation of an Act of Parliament.

PART II.—THE BOARD AND THE COMMITTEES.

The Board.

4. The Board to administer this Scheme shall be called the Live Stock (England) Marketing Board, and shall be a body corporate with a common seal and power to hold land without licence in mortmain.
5. Until the end of February, 1935, the Board shall consist of the following persons :—

Two persons nominated by the Minister in accordance with proviso (i) to sub-section (1) of section fourteen of the Act of 1933;

and thereafter the Board shall, subject to the provisions of this Scheme with respect to casual vacancies, consist of fifteen district members elected two for each district except the Northern district and three for the Northern district, three special members elected for the whole of England in accordance with the provisions of Part IX of this Scheme, and two members co-opted in accordance with the provisions of the said section fourteen.

6. (1) The district members for each district shall be elected by the district committee for that district at a meeting of that committee.

(2) An election of district members for the South-Eastern district and an election of district members for the Eastern district shall be held in the year 1935, the year 1936, and every third calendar year after the year 1936.

(3) An election of district members for the Northern district and an election of district members for the East Midland district shall be held in the year 1935, the year 1937 and every third calendar year after the year 1937.

(4) An election of district members for the Wales district, an election of district members for the West Midland district, and an election of district members for the South-Western district shall be held in the year 1935 and every third calendar year thereafter.

(5) Every election of district members held under this paragraph in any district in any calendar year shall be held as soon as may be after the completion of the elections of sub-district representatives held in that district in that year, and every district member shall, subject to the provisions of this Scheme, hold office from the expiration of the day on which he was elected until the expiration of the day on which the next district election for his district is held under this paragraph :

Provided that the district members elected in 1935 shall not begin to hold office before the end of February, 1935.

7. (1) An election of special members shall be held in each calendar year as soon as may be after the completion of the elections of sub-district representatives held in that year.

(2) In 1935, three special representatives shall be elected, and after the year 1935 only one special member shall be elected in each calendar year.

(3) Every special member shall, subject to the provisions of this Scheme, hold office from the expiration of the day on which he is elected until the expiration of the day on which the election of special members is held in the next calendar year but two after the calendar year in which he is elected :

Provided that the special members elected in 1935 shall not begin to hold office before the end of February, 1935, and of the special members elected in that year, one (to be selected by lot) shall cease to hold office on the expiration of the day on which the election of special members is held in 1936 and one (to be selected by lot) shall cease to hold office on the expiration of the day on which the election of special members is held in 1937.

8. (1) Whenever under this Scheme a member has to be co-opted to the Board in accordance with the provisions of section fourteen of the Act of 1933, the co-option shall take place at a meeting of the Board and the provisions of this Scheme relating to quorum, procedure and similar matters shall apply accordingly, but the members of the Board who are not elected members shall not be present.

(2) A member who is, by virtue of the provisions of this paragraph, co-opted in accordance with the provisions of the said section fourteen shall, subject to the provisions of this Scheme, hold office until the end of February in the next calendar year but one after that in which he was so co-opted :

Provided that of the two members first so co-opted one (to be selected by lot) shall cease to hold office at the end of February, 1936.

9. A member of the Board who ceases to hold office shall be eligible again to become a member of the Board.

10. A member of the Board shall cease to hold office :—

(a) if he delivers to the Secretary of the Board a written resignation of his office and the resignation is accepted by the Board, or if not accepted, is not withdrawn before the end of the seventh day after the day on which the resignation was received by the Secretary of the Board ; or

(b) if he is detained for more than seven consecutive days in any place under any enactment in force in any part of the United Kingdom relating to persons of unsound mind ; or

(c) if he is adjudged bankrupt or enters into a composition or scheme of arrangement with his creditors ; or

(d) if the Board by resolution declare that he has been absent from six consecutive meetings of the Board without reasonable excuse ; or

(e) if he is convicted of any offence under sub-section (2) of section seventeen of the Act.

11. (1) If a district member of the Board dies or ceases under the last preceding paragraph to hold office, the district committee shall elect a person to fill the vacancy.

(2) If a special member of the Board dies or ceases under the said paragraph to hold office, the Board shall co-opt a person to fill the vacancy.

(3) If a member of the Board co-opted in accordance with the provisions of section fourteen of the Act of 1933 dies or ceases under the said paragraph to hold office, another person shall be co-opted in accordance with the said provisions.

(4) Any person elected or co-opted a member of the Board under this paragraph shall, unless he dies or ceases under the last preceding paragraph to hold office, hold office for so long as his predecessor would have held office.

12. The quorum of the Board shall be such as the Board may from time to time determine, but shall, until otherwise determined, be five, and shall not be less than that number.

The Executive Committee.

13. (1) The Board shall, as soon as may be after the coming into force of this Scheme and also as soon as may be after every election of special members, appoint from among their members an executive committee, and may, subject to the provisions of this paragraph, from time to time add to the membership thereof.

(2) The executive committee shall consist of not more than seven members, of whom the Chairman and Vice-Chairman of the Board shall be two ; and of the members of the executive committee one at least must have been nominated a member of the Board by the Minister or co-opted a member of the Board in accordance with the provisions of section fourteen of the Act of 1933.

(3) A member of the executive committee shall cease to be a member of that committee :—

(a) if he ceases to be a member of the Board ; or

(b) (except in the case of the Chairman or Vice-Chairman of the Board) if the Board resolve that he is to cease to be a member of the committee ; or

(c) (except in the case of the Chairman or Vice-Chairman of the Board) if he delivers to the Secretary of the Board a written resignation and the resignation is accepted by the Board or if not accepted is not withdrawn before the end of the seventh day after the day on which the resignation is received by the Secretary of the Board ;

and in any event all the members of the executive committee shall cease to be members of the committee at the expiration of the day on which any election of special members is held ; but any member of the executive committee who ceases to be a member of the committee shall, if he remains a member of the Board, be eligible again to become a member of the committee.

(4) The quorum of the executive committee shall be such as the Board may from time to time determine, but shall unless otherwise determined be three, and shall not be less than that number.

14. (1) All matters from time to time arising in the administration of, or otherwise in connection with, this Scheme (being matters which would but for the provisions of this paragraph have to be considered by the Board) shall stand referred to and be considered by the executive committee and any question as to what action, if any, shall be taken in respect thereof shall, subject to the provisions of this paragraph, be decided by the executive committee, and the executive committee may for the purpose of giving effect to their decisions exercise in the name and on behalf of the Board all or any of the powers of the Board, and references in this Scheme to the Board shall, so far as is necessary to enable the executive committee to decide those questions and to exercise those powers for the purpose of giving effect to their decisions, be construed as references to the executive committee :

Provided that—

(a) questions as to the composition or quorum of the Board or the executive committee or as to the Chairmanship or Vice-Chairmanship of the Board shall not stand referred to or be considered or dealt with by the executive committee ;

(b) decisions of the executive committee in connection with the matters mentioned in the Second Schedule to this Scheme shall, except where the Board otherwise resolve, have no effect unless confirmed by the Board, and where the Board refuse to confirm any such decision, the Board may either themselves decide the question or may remit it to the executive committee for further consideration.

(2) The executive committee shall from time to time cause a report of their proceedings to be sent to every member of the Board.

The Consultative Committees.

15. (1) The Board may from time to time appoint committees consisting wholly or partly of members of the Board to consider, and advise the Board on, such questions as may be referred to them by the Board.

(2) The quorum of any such committee shall be such as may be fixed by the Board for that committee.

The District Committees.

16. (1) There shall be for each district a committee (in this Scheme referred to as a "district committee") whose duty it shall be to elect the district members of the Board for the district, to report to the Board from time to time on the operation of this Scheme in that district, and, when consulted by the Board with respect to any proposal of the Board, to advise them as to the desirability of the proposal insofar as it concerns producers in that district.

(2) The district committee for each district shall consist of:—

(a) representatives (in this Scheme referred to as "sub-district representatives") elected for each sub-district in accordance with the provisions of Part VIII of this Scheme ; and

(b) such, if any, of the district members of the Board for the district for the time being as are not sub-district representatives in the district :

Provided that a district member of the Board for any district who is not also a sub-district representative in that district shall not take part in the election of any district member of the Board for the district.

(3) There shall be elected for each sub-district such number of sub-district representatives as is allotted to that sub-district by the First Schedule to this Scheme :

Provided that at any time after the fourth day of December, 1935, the Board may, if they are satisfied that it is just so to do having regard to the relative quantities of live stock produced in the various sub-districts in any district, direct that at the next and subsequent elections of sub-district

representatives for any sub-district (until another direction is given under this paragraph) such lesser or greater number of sub-district representatives shall be elected as may be specified in the direction.

(4) The quorum of any district committee shall be such as the Board may from time to time fix for that committee.

17. (1) Elections of sub-district representatives shall be held in each district in each calendar year as soon as may be after the beginning of that year.

(2) Every sub-district representative shall, subject to the provisions of this paragraph, hold office until the expiration of the day on which the election of sub-district representatives for the sub-district is completed in the next calendar year.

(3) A sub-district representative shall cease to hold office :—

(a) if he delivers to the secretary of the committee a written resignation of his office and the resignation is accepted by the committee or if not accepted is not withdrawn before the expiration of the seventh day after the day on which it is received by the secretary of the committee ; or

(b) if he is detained for more than seven consecutive days in any place under any enactment in force in the United Kingdom relating to persons of unsound mind ; or

(c) if he is adjudged bankrupt or enters into a composition or scheme of arrangement with his creditors ; or

(d) if the committee by resolution declare that he has been absent from six consecutive meetings of the committee without reasonable excuse.

(4) If a sub-district representative dies or ceases to hold office under the provisions of the last preceding sub-paragraph, the committee may co-opt a person to be sub-district representative in his place, and any person so co-opted shall hold office for so long as his predecessor would have held office.

(5) A sub-district representative who ceases to hold office shall be eligible again to become a sub-district representative.

Procedural Provisions as to the Board and the Committees.

18. (1) The Board or any committee may act notwithstanding any vacancy in their number.

(2) The Chairman or Vice-Chairman or any three members of the Board may, and the Secretary on the request of the Chairman or Vice-Chairman or of any three members of the Board shall, convene a meeting of the Board.

(3) The chairman or any two members of any committee may, and the secretary of the committee on the request of the chairman or of any two members of the committee shall, convene a meeting of the committee.

(4) The Chairman or in his absence the Vice-Chairman of the Board shall take the chair at any meeting of the Board or at any meeting of a committee at which they are respectively present as members, and failing the Chairman and Vice-Chairman of the Board, the chair shall be taken at meetings of the Board and the committees by such member of the Board or committee as may be appointed in that behalf by the Board or committee.

(5) Questions arising at a meeting of the Board or a committee shall be decided according to the opinion of the majority of the members present :

Provided that—

(a) where the question is which of several persons proposed in that behalf by members present is to fill a vacancy in the Chairmanship or Vice-Chairmanship of the Board or any vacancy or vacancies in the membership of the Board or any committee, each member present shall have as many votes as there are vacancies to be filled but shall not

give more than one vote in favour of any one candidate, and the person or persons who receive the most votes shall be deemed to be chosen ;

(b) in the case of an equality of votes on any question, the member acting as chairman shall, in addition to his other votes, have a casting vote.

(6) All acts done at a meeting of the Board or any committee shall, notwithstanding that it is afterwards discovered that there was some defect in the appointment, election or qualification of a person purporting to be a member of the Board or committee, or that a member has voted on a question upon which he was not entitled to vote, be as valid as if the defect had not existed or as if the member had been entitled to vote.

(7) Minutes shall be kept of the proceedings of the Board and of the proceedings of any committee, and any such minutes shall, if signed by a person purporting to have acted as chairman of the meeting to which they relate or of a meeting at which they were read, be evidence of those proceedings, and the meeting to which any such minutes relate shall, until the contrary is proved, be presumed to have been regularly convened and constituted.

General Powers of the Board.

19. (1) The Board—

(a) shall appoint from among their members a Chairman and Vice-Chairman ;

(b) may employ such officers, servants and agents, and entrust to them such duties, as the Board think fit ;

(c) shall have an office in England at which communications and notices will at all times be received and shall keep the Minister notified of the address thereof ;

(d) may enter into such agreements, acquire such property and do such things as may in their opinion be necessary or desirable for the purpose of exercising any of their powers or performing any of their duties under this Scheme, and may sell or otherwise dispose of any property so acquired by them.

(2) The Chairman and Vice-Chairman of the Board shall, if they remain respectively members of the Board, hold office until the expiration of the day on which the next election of special members is held :

Provided that the Chairman or Vice-Chairman shall cease to hold office if he delivers to the Secretary of the Board a written resignation of his office, and the resignation is accepted by the Board, or if not accepted is not withdrawn before the end of the seventh day after the day on which the resignation is received by the Secretary of the Board.

(3) A person who has ceased to be the Chairman or Vice-Chairman of the Board shall, if he is a member of the Board, be eligible again to become the Chairman or Vice-Chairman of the Board.

Remuneration and Expenses of Members.

20. (1) The Board shall pay to the Chairman of the Board, the Vice-Chairman of the Board, the other members of the executive committee and the other members of the Board such remuneration, if any, as may from time to time be fixed in their respective cases by the registered producers in general meeting.

(2) The Board may pay to any member of the Board or of any committee such travelling and out-of-pocket expenses as have been reasonably incurred by him in connection with the business of the Board.

Common Seal.

21. The application of the common seal of the Board to any document shall be attested by at least two members of the executive committee and the Secretary of the Board.

Contracts and Instruments.

22. Such contracts and instruments as would not in the case of a private individual require to be under seal may be entered into or executed on behalf of the Board by any person authorised in that behalf by the Board.

23. (1) A contract entered into by the Board shall not be avoided by reason only that the Chairman or Vice-Chairman of the Board, any person acting as the Chairman of the Board or any committee, or any other member of the Board or any committee, is also a party thereto or is interested therein, and, subject to the provisions of this paragraph, a member of the Board or any committee who is a party to or interested in a contract with the Board shall not, by reason only that he is the Chairman or Vice-Chairman of the Board, or is acting as Chairman of the Board or any committee, or is a member of the Board or any committee, be liable to account to the Board for any profit realised by him by reason of the contract.

(2) Every member of the Board shall forthwith disclose to the Board any interest which he has, acquires or proposes to acquire, in any contract to which the Board are a party or in which the Board have, acquire or propose to acquire any interest, and any interest which he has, acquires or proposes to acquire in any other contract which might influence his performance of his duties as Chairman or Vice-Chairman of the Board, or as the member acting as Chairman of the Board or any committee, or as a member of the Board or any committee, and if without reasonable excuse any member of the Board fails so to do, he shall be liable to account to the Board for any profit realised by him by reason of the contract.

(3) A member of the Board shall not vote at a meeting either of the Board or of any committee, upon any question in which he has any interest, not being a question relating to the general policy of the Board, and if he does vote, his vote shall not be counted :

Provided that in the event of an equality of votes at a meeting on a question upon which the person acting as Chairman is by virtue of this sub-paragraph not entitled to vote, that person shall notwithstanding anything in this paragraph have a casting vote.

PART III.—REGISTER OF PRODUCERS.

24. The Board shall keep a register of producers, and every producer shall, on application to the Board, be entitled to be registered therein.

25. (1) The register of producers shall be open for inspection at the office of the Board from 10 a.m. to 4 p.m. on weekdays other than Saturdays, except on Christmas Day, Good Friday and any Bank Holiday.

(2) Any person shall be entitled to be supplied with a copy of the register or any part thereof on payment of a fee not exceeding one half-penny for each entry copied or to make extracts therefrom for his own use free of charge.

26. (1) Any producer whose pasture land does not exceed five acres in extent, shall, unless in the twelve months immediately preceding he has sold more than fifteen pigs or more than ten sheep or more than four cattle (being pigs, sheep or cattle which he has himself produced in England), be exempt from registration.

(2) For the purposes of this paragraph, pasture land shall be deemed to be pasture land of a producer if, and only if, either solely or together with others, he has any right, otherwise than as a commoner, to graze animals thereon.

27. The Board, on being satisfied that a person who is registered has ceased to be a producer or is exempt from registration shall remove his name from the register :

Provided that the name of a person shall not be removed from the register without his consent by reason only that he is exempt from registration.

PART IV.—POLLS.

28. (1) On the coming into force of this Scheme, a poll of the registered producers shall be taken on the question whether this Scheme is to remain in force.

(2) The said poll (in this Scheme referred to as the "initial poll") and any poll held in connection with a proposal for the amendment or revocation of this Scheme shall be taken in accordance with the following provisions of this Part of this Scheme.

29. The producers who are entitled to vote on the poll shall be the producers who are registered on the qualifying date, that is to say—

(a) in the case of the initial poll, the day on which the time for registration specified in the notice to be published by the Board under sub-section (1) of section four of the Act expires ;

(b) in the case of any other poll, on such day as may be determined by the Board :

Provided that a producer who is exempt from registration shall, notwithstanding that he is registered, not be entitled to vote on the initial poll.

30. The poll shall be conducted by post and the Board shall, not later than the seventh day after the qualifying date, send a voting paper to every producer entitled to vote.

In the event of the loss of a voting paper so sent, the Board may supply a duplicate voting paper.

31. The voting paper shall be in the form set out in the Third Schedule to this Scheme, and only voting papers which are properly completed and reach the office of the Board on or before the fourteenth day after the qualifying date shall be taken into account ; and any person who knowingly makes any false statement in a voting paper shall be liable on summary conviction to be imprisoned for a period not exceeding three months, or to a fine not exceeding one hundred pounds, or to both such imprisonment and fine.

32. For the purposes of any poll, cattle, sheep and pigs shall not be taken to be separate products and the quantity of live stock which a producer is capable of producing shall be taken to be proportional to the sum of the following quantities, that is to say, the quantity of live stock in his possession on the fourth day of June last preceding the qualifying date and the quantity of live stock in his possession on the fourth day of December last preceding the qualifying date :

Provided that, in the case of a registered producer who either on the said fourth day of June or on the said fourth day of December was not a producer of live stock, twice the quantity of live stock in his possession on the qualifying date shall be taken in lieu of the sum of the two quantities aforesaid.

33. The Board shall cause the votes to be counted by an independent person, and the result of the poll as certified by him to the Board shall be declared at a meeting of the executive committee by the member acting as Chairman at that meeting, and shall be published by the Board in *The Times* newspaper, or, at the option of the Board, by sending a notice thereof, in the case of the initial poll, to every person who is known to the Board to be a producer, and in the case of any other poll, to every registered producer.

PART V.—FINANCIAL PROVISIONS.

34. (1) There shall be established a fund (in this Scheme referred to as "the fund") which shall be administered and controlled by the Board.

(2) All moneys received by the Board shall be paid into the fund, and any moneys required by the Board for the operation of this Scheme shall be paid out of the fund.

(3) Any moneys for the time being standing to the credit of the fund may be left on current or deposit account in any bank or invested in any securities in which a trustee may lawfully invest trust moneys under the powers of section one of the Trustee Act, 1925, as extended by any subsequent enactment.

35. The Board may, for the purpose of exercising any of their functions under this Scheme, borrow money in such manner, on such terms and on such security as may be arranged by them with the person from whom the money is borrowed.

36. The Board shall keep proper accounts and in particular shall annually make out a balance sheet and either an income and expenditure account or, if the Board trade for profit, a profit and loss account, and shall cause the said balance sheet and profit and loss or income and expenditure account to be audited by a member of the Institute of Chartered Accountants or of the Society of Incorporated Accountants and Auditors or of the Corporation of Accountants Limited or of the London Association of Certified Accountants Limited nominated by a general meeting of registered producers, and as soon as may be after the auditor has reported and in any case within three months of the close of the period covered by the income and expenditure or profit and loss account shall send to the Minister and to every registered producer a copy of the balance sheet and the profit and loss or income and expenditure account and (except where the auditor has not reported) of the report of the auditor and also a report by the Board as to the working of this Scheme in the period covered by the income and expenditure or profit and loss account :

Provided that the person who is to audit the first balance sheet and income and expenditure or profit and loss account made out by the Board under this paragraph shall be nominated by the Board instead of by a general meeting of registered producers.

37. The Board shall, on the demand of any person and on payment by him of such fee, not exceeding one shilling, as may be fixed by the Board, furnish to him a copy of any of their balance sheets.

PART VI.—PROVISIONS AS TO MARKETING AND PRINCIPAL POWERS OF THE BOARD.

Coming into Force of Part VI.

38. The provisions of this Part of this Scheme shall come into force at the expiration of the suspensory period, that is to say, at the expiration of the period of one month beginning on the date on which the result of the initial poll is declared to be favourable to the continuance in force of this Scheme.

Regulation of Marketing.

39. A producer who is neither registered nor exempt from registration shall not sell any live stock either in England or elsewhere.

40. (1) The Board may from time to time determine the terms on which and the persons to or through the agency of whom all or any registered producers may sell live stock or any particular description or quantity of live stock, and if any registered producer, either in England or elsewhere, sells any live stock otherwise than in accordance with any such determination of the Board, then, subject to the provisions of this Part of this Scheme, the Board shall by resolution impose upon and shall recover from him such monetary penalty not exceeding twenty-five pounds in respect of each animal sold, as they think fit.

(2) The Board shall not, by the exercise of the powers conferred on them by the last preceding paragraph, seek to establish or standardise the practices to be observed or the course of business to be followed in connection with any

class of sale of live stock without consulting such organisations as appear to them to represent the various classes of person to or through the agency of whom that class of sale is effected.

41. The Board may from time to time determine the manner in which live stock or any description or quantity of live stock which are to be sold by a registered producer are to be graded, marked, packed, stored, adapted for sale, insured, advertised or transported by him or on his behalf, and if, while such a determination is in force, any live stock are sold by a registered producer, either in England or elsewhere, after being graded, marked, packed, stored, adapted for sale, insured, advertised or transported by him or on his behalf otherwise than in accordance with the determination, then, subject to the provisions of this Part of this Scheme, the Board shall by resolution impose upon, and shall recover from, that producer such monetary penalty not exceeding twenty-five pounds in respect of each animal sold as they think fit.

42. (1) Except in the case of sales of such classes as the Board may from time to time by resolution specify, a registered producer shall not, without the consent of the Board, sell any quantity of live stock of any description at any place in any manner on any day, unless he has given to such officer of the Board as the Board may appoint for the purpose such notice as may be required by the Board of his intention to sell that quantity, or a specified greater quantity, of live stock of that description at that place in that manner on that day.

(2) If the Board are of opinion that it is expedient to limit the total quantity of live stock, or the total quantity of live stock of any description, which may be sold by registered producers, either on a particular day or during a particular period, and either anywhere or at any particular place, and either in any manner or in any particular manner, they may for that purpose serve on any registered producer who has given notice under the foregoing provisions of this paragraph of his intention to sell live stock, a direction in writing that on a specified day or during a specified period, he is not to sell in any place, or, as the case may be, in a specified place, in any manner or, as the case may be, in a specified manner, more than a specified quantity of live stock, or as the case may be, more than a specified quantity of live stock of a specified description, and it shall be the duty of the registered producer to comply with the direction.

(3) Unless and until the Board prescribe some other method of allocating any such total quantity as is mentioned in sub-paragraph (2) of this paragraph among the registered producers concerned, the Board shall, so far as may be, allocate the total quantity among the registered producers according to the priority of their respective notices of intention to sell live stock.

(4) If any registered producer sells any live stock, either in England or elsewhere, in contravention of the provisions of this paragraph, then subject to the provisions of this Part of this Scheme, the Board shall by resolution impose upon and shall recover from him such monetary penalty not exceeding twenty-five pounds in respect of each animal sold, as they think fit.

43. The three last preceding paragraphs shall have effect subject to the provisions of the Act with respect to existing contracts and there shall be exempt from the provisions of the said three paragraphs :—

(a) sales of pigs under contracts registered and confirmed under Part VI of the Pigs Marketing Scheme, 1933, and sales of pigs to the Pigs Marketing Board ;

(b) sales of cows in milk and sales of cows and heifers expected to calve within three months of the date of the sale ;

(c) such other sales (if any) as may from time to time be determined by the Board.

Trading Powers of the Board.

44. The Board may—

- (a) buy, sell, grade, pack, store, adapt for sale, insure, advertise and transport live stock ;
- (b) buy, and sell or let for hire to registered producers, anything required for the production, adaptation for sale, or sale of live stock ;
- (c) co-operate with any other person in doing any of the things aforesaid.

45. The Board may—

- (a) buy cattle, sheep or pigs of any description from the board administering any other scheme under the Act regulating the marketing of cattle, sheep or pigs of any description or from the board administering any scheme under corresponding legislation enacted by the Parliament of Northern Ireland regulating the marketing of cattle, sheep or pigs of any description ;
- (b) exercise as agents for any such board any power of that board to sell, grade, pack, store, adapt for sale, insure, advertise or transport, cattle, sheep or pigs of any description ;
- (c) sell, grade, pack, store, adapt for sale, insure, advertise and transport any cattle, sheep or pigs bought from any such board.

Powers of the Board as to Loans and Guarantees.

46. The Board may—

- (a) lend to any registered producer sums not exceeding two-thirds of the amount which they estimate he will receive from the sale of live stock produced or in course of production by him ;
- (b) guarantee payment of any sums secured by an agricultural charge created by a registered producer under Part II of the Agricultural Credits Act, 1928.

Agricultural Co-operation, Research and Education.

47. The Board may encourage and promote education in, and co-operation with respect to, the production and marketing of live stock and live stock products, and may encourage, promote and conduct research with respect to the production and marketing of live stock and live stock products and in particular and without prejudice to the generality of the preceding provisions of this paragraph may publish, in such manner and on such terms (if any) as to payment or otherwise as they think fit, market intelligence and other information likely to promote the efficient production and marketing of live stock and live stock products.

Contributions.

48. (1) The Board may, once in respect of each half year, by resolution require producers registered on the date of the resolution or on the day before the beginning of the half year, whichever is the later, to pay to the Board a contribution to the expenses of the Board.

In this paragraph the expression "half year" means a period of six months beginning on the 5th day of June or the 5th day of December.

(2) The contribution to be made by each registered producer under any such resolution shall be determined by reference to the quantity of live stock in his possession on the day before the beginning of the half year in respect of which the resolution is passed :

Provided that, in the case of a registered producer who on the said day was not a producer of live stock, the quantity of live stock in his possession on the date of the resolution shall be taken in lieu of the quantity of live stock in his possession on the said day.

(3) Subject to the preceding provisions of this paragraph, the amount of the contribution to be made under a resolution shall be such as may be

specified in the resolution, but shall not, in the case of any resolution, exceed one penny for each unit of quantity.

(4) Where the Board consent to the sale of live stock by a registered producer notwithstanding that he has not given such notice as is required under sub-paragraph (1) of paragraph forty-two of this Scheme, or where a registered producer, having given notice under that sub-paragraph of his intention to sell a specified quantity of live stock on a specified day in a specified manner at a specified place, offers for sale a lesser quantity of live stock on that day in that manner at that place, the registered producer shall, in such cases as may from time to time be prescribed by the Board, pay a contribution to the fund calculated according to a scale to be so prescribed.

(5) The Board shall so exercise their powers under this paragraph as to raise, as nearly as may be, such amounts as will in their opinion be required for the operation of this Scheme.

(6) The amount of any contribution required to be made by or under this paragraph shall be a debt due to the Board and shall be recoverable accordingly.

Power of Entry.

49. Any person authorised in writing by the Board may for the purpose of enabling the Board to secure compliance with this Scheme enter and inspect at any reasonable time and on production of his authority any part of the land or premises occupied by a registered producer (being a producer specified in the authority) which the person so authorised has reason to believe is used for producing, grading, marking, packing, or storing live stock or adapting live stock for sale.

Information and Returns.

50. The Board may, whenever they consider it necessary for the operation of this scheme, require any registered producer to furnish to them within such period as may be specified in the requirement such estimates, returns or other information relating to live stock as may be so specified and if without reasonable excuse he fails to comply with the requirement within the time so specified or if he knowingly makes any false statement in reply thereto, then, subject to the provisions of this Part of this Scheme, the Board shall by resolution impose upon and shall recover from him such monetary penalty not exceeding twenty pounds as they think just.

Power to Exempt Registered Producers.

51. Without prejudice to any other provisions of this Part of this Scheme with respect to exemption from the operation thereof, such registered producers as may from time to time be determined by the Board shall be exempt from such of the provisions of this Part of this Scheme as may be so determined.

Compensation.

52. Any registered producer who satisfies the Board or establishes by arbitration in accordance with Part XI of this Scheme that he has suffered damage by reason of the Board treating him, without due cause, less favourably than it is their practice to treat other registered producers in like circumstances, shall be entitled to receive from the Board such sums by way of compensation as may be necessary to make good the damage.

General Provisions as to Penalties.

53. The following provisions shall have effect with respect to the imposition of penalties by the Board on registered producers under the preceding provisions of this Part of this Scheme—

(a) no penalty shall be imposed in respect of any act or omission which constitutes an offence under any Act other than the Act ;

(b) every penalty so imposed shall, subject to the provisions of the next succeeding sub-paragraph, be a debt due to the Board and recoverable accordingly ;

(c) immediately on the passing of any resolution imposing a penalty, notice of the resolution shall be sent by registered post to the registered producer, and he may within fourteen days from the day on which notice was so sent to him give notice to the Board referring the matter to arbitration under the provisions of Part XI of this Scheme ; and if the matter is so referred no proceedings shall be taken by the Board except in or for the purposes of the arbitration or to enforce the award of the arbitrator, and the arbitrator may award payment of such penalty, if any, not exceeding the maximum penalty which could have been imposed by the Board, as he thinks just.

Distribution of Surplus Assets.

54. Any sums standing to the credit of the fund which are not required for the operation of this Scheme shall be distributed among registered producers in such manner as may be decided by a general meeting of registered producers.

PART VII.—MEETINGS OF REGISTERED PRODUCERS.

55. Without prejudice to any other provisions of this Scheme, the Board may convene a general meeting, district meeting or sub-district meeting of registered producers to discuss any question which in the opinion of the Board should be discussed at such a meeting.

56. (1) Whenever anything is to be done by a general meeting, a district meeting, or a sub-district meeting, of registered producers, the Board shall arrange for the holding of such a meeting at such time and place as they may appoint.

(2) Every district meeting or sub-district meeting shall be held within the district or sub-district.

57. The Chairman of every meeting shall be appointed by the Board :
Provided that—

(a) at every general meeting, the Chairman of the Board or, in his absence, the Vice-Chairman of the Board (if he is present) shall be the chairman :

(b) if the person who under the preceding provisions of this paragraph is to act as chairman at any meeting is not present within fifteen minutes of the time appointed for the meeting, the meeting shall choose a chairman.

58. At least ten days before the day fixed for the holding of a meeting the Board shall send to every registered producer who is entitled to vote at the meeting a written notice stating—

(a) the time and place appointed for the holding of the meeting ;

(b) the business to be transacted ;

(c) the name of the Chairman :

Provided that a meeting shall not be deemed to have been invalidly held by reason only that, owing to inadvertence or owing to any reasonable cause, such a written notice as aforesaid was not sent to every registered producer entitled to vote at the meeting.

59. No business shall be transacted at any meeting other than the business of which notice has been given as aforesaid by the Board.

60. At a general meeting every registered producer shall be entitled to vote, and at a district or sub-district meeting those registered producers shall be entitled to vote who are engaged in producing live stock in the district or sub-district.

61. At any meeting, registered producers may vote either personally or by proxy. The instrument appointing a proxy shall be in writing in such form as the Board may require, under the hand of the registered producer or his attorney, or, if the registered producer is a limited company, either under their seal or under the hand of a person duly authorised by them in that behalf. The said instrument and the power of attorney or other authority (if any) under which it is signed, or a notarially certified copy thereof, shall be deposited at the office of the Board not later than the end of the third day before the day fixed for the meeting, and in default the instrument shall be treated as invalid.

The proxy of a registered producer must himself be a registered producer.

62. Every question put before a meeting shall be decided on a show of hands :

Provided that, if, at a general meeting, either before or immediately after the show of hands, a formal vote is demanded by or on behalf of at least three registered producers entitled to vote, a formal vote shall forthwith be taken.

63. (1) On the taking of a formal vote a registered producer shall have the standard number of votes.

(2) In this paragraph, the expression " the standard number of votes " means, in relation to each registered producer, a number equal to the number of units of quantity comprised in the sum of the two following quantities, that is to say, the quantity of live stock in his possession on the fourth day of June last preceding the date of the meeting and the quantity of live stock in his possession on the fourth day of December last preceding the date of the meeting :

Provided that, in the case of a registered producer who either on the said fourth day of June or on the said fourth day of December was not a producer of live stock, twice the quantity of live stock in his possession on the date of the meeting shall be taken in lieu of the sum of the two quantities aforesaid.

64. Without prejudice to the provisions of this Part of this Scheme relating to proxies, a limited company may exercise any of their rights at a meeting by any one of their directors, and a partnership may exercise any of their rights at a meeting by any one of their partners.

65. (1) At any meeting the declaration of the chairman of the meeting as to the result of any vote or show of hands shall be final :

Provided that in the case of a formal vote the chairman of the meeting may order that the counting of the votes be deferred until after the conclusion of the meeting and may nominate persons to count and superintend the counting, and in that case the declaration of the person so appointed to superintend the counting as to the result of the vote shall be final.

(2) In the event of an equality of votes, the chairman of the meeting shall, in addition to his other votes (if any), have a casting vote.

PART VIII.—ELECTION OF SUB-DISTRICT REPRESENTATIVES.

66. The persons who are entitled to vote at an election of sub-district representatives shall be such registered producers as, on the preceding fourth day of December, were registered and were producing live stock in the sub-district.

67. When such an election is to be held, the Board shall fix a day on or before which nominations of candidates must be received and the name and address of the person to whom the nominations are to be sent and shall, not later than the seventh day before the day so fixed, publish in a newspaper circulating in the sub-district or in such other manner as they think adapted

to inform the registered producers affected, a notice that the election is to be held, stating the number of persons to be elected and specifying the name and address of the person to whom nominations of candidates are to be sent and the day fixed as the last day on which such nominations will be received ; and no person shall be capable of being elected unless he has been so nominated by at least ten persons entitled to vote and the nominations have been received at the specified address on or before the said day.

68. If no more candidates are duly nominated than there are persons to be elected, the candidates nominated shall be deemed to be elected.

69. (1) If more candidates are duly nominated than there are persons to be elected, a vote shall be taken by post, and the Board shall for that purpose send to every person entitled to vote at the election a voting paper, in such form as they think proper, stating the names and addresses of the candidates and the number of persons to be elected, and specifying the name and address of the person to whom the voting papers are to be sent and the last day (which shall not be earlier than the seventh day after the day on which the voting papers were sent by the Board) on which voting papers will be received ; and no voting paper shall be taken into account unless it is received at the specified address on or before the specified day :

Provided that no election shall be deemed to have been invalidly held by reason only that, owing to inadvertence or owing to any reasonable cause, a voting paper was not sent to every person entitled to vote at the election.

(2) In the event of the loss of a voting paper, the Board may supply a duplicate voting paper.

70. (1) A person entitled to vote—

(a) shall vote on a voting paper supplied to him by the Board and not otherwise ;

(b) may vote for any number of candidates not exceeding the number of persons to be elected ;

(c) shall sign his voting paper and add his address.

(2) If a voting paper is unsigned or the address of the voter is not given or if the voter purports to vote for more candidates than there are persons to be elected, the voting paper shall not be taken into account.

(3) Subject as aforesaid, the votes of a person entitled to vote shall not be rejected by reason of any defect in the manner in which he has filled up his voting paper.

(4) Where it does not clearly appear from a voting paper whether or not the voter intended to vote in favour of any particular candidate, he shall be taken not to have voted in favour of that candidate.

71. (1) Every person entitled to vote at the election shall be taken to have given the standard number of votes in favour of each candidate for whom he has voted.

(2) In this paragraph the expression " the standard number of votes " means, in relation to a voter, a number of votes equal to the number of units of quantity comprised in the sum of the two following quantities, that is to say, the quantity of live stock in his possession in the sub-district on the fourth day of June in the calendar year preceding that in which the voting takes place and the quantity of live stock in his possession in the sub-district on the fourth day of December in the calendar year preceding that in which the voting takes place :

Provided that where the person entitled to vote was not on the said fourth day of June a producer of live stock, twice the quantity of live stock in his possession on the said fourth day of December shall be taken in lieu of the sum of the two quantities aforesaid.

(3) The Board shall cause the votes to be counted and those candidates who receive the most votes shall be deemed to be elected.

72. If, for any reason, enough persons are not elected at an election to fill the vacancies required to be filled at the election, the Board shall cause another election to be held to fill the vacancies not filled at the first election.

PART IX.—ELECTION OF SPECIAL MEMBERS OF THE BOARD.

73. (1) Subject to the provisions of this Scheme with respect to casual vacancies, the special members of the Board shall be elected by the sub-district representatives for the time being at a meeting of those representatives to be convened for that purpose by the Board.

(2) The chair shall be taken at the meeting by such person as the Board may appoint for the purpose :

Provided that if the person appointed by the Board to take the chair at the meeting is not present within fifteen minutes of the time appointed for the meeting, the meeting shall choose a chairman.

(3) The quorum for any such meeting shall be seven.

74. (1) At the meeting, any sub-district representative may propose such persons as he thinks fit as candidates for election as special members of the Board.

(2) If, when all the sub-district representatives present have had an opportunity of proposing candidates, not more candidates have been proposed (exclusive of any candidates whose names have been withdrawn by the persons proposing them) than there are vacancies to be filled, those candidates shall be deemed to be elected ; but in any other case, a vote shall be taken at the meeting as to which of those candidates are to be elected.

(3) On any such vote being taken, each sub-district representative shall have one vote, except in 1935 when each sub-district representative shall have as many votes as there are persons to be elected but shall not give more than one vote in favour of any one candidate ; and the candidate or candidates who receive the most votes shall be deemed to be elected.

(4) In the event of an equality of votes, the chairman shall, in addition to his other votes, if any, have a casting vote.

(5) Any member of the Board who is not a sub-district representative may attend and speak at the meeting.

75. A sub-district representative may exercise any of his rights under this Part of this Scheme either personally or through another sub-district representative authorised by him in writing in that behalf ; but a sub-district representative who claims to be authorised to exercise any rights on behalf of another sub-district representative at any meeting shall, before he is permitted to do so, deliver his written authority to the person acting as chairman of the meeting and that person shall transmit it to the Board.

76. If, for any reason, enough persons are not elected at any meeting to fill the vacancies required to be filled at that meeting, the Board shall convene another meeting to fill the vacancies not filled at the first meeting.

77. A sub-district representative who has been co-opted as such to fill a casual vacancy shall not have the rights of a sub-district representative under this Part of this Scheme, and accordingly references in the foregoing paragraphs of this Part of this Scheme to sub-district representatives do not include references to co-opted sub-district representatives.

PART X.—AMENDMENT AND REVOCATION OF SCHEME AND WINDING UP OF THE BOARD.

78. Before submitting a substitutional scheme or an amendment of this Scheme to the Minister, the Board shall publish the proposed scheme or amendment by serving notice thereof on every registered producer.

79. A poll on the question whether or not a substitutional scheme or an amendment of this Scheme shall be submitted to the Minister may, within

one month from the publication thereof, be demanded in writing by any 500 registered producers and a poll on the question whether or not this Scheme is to be revoked may be demanded at any time in the said manner by any 1,000 registered producers, but no poll shall without the consent of the Board be taken on the question whether or not this Scheme is to be revoked within one year of the declaration of the result of a previous poll on that question.

80. Part X of the Companies Act, 1929 (which relates to the winding up of unregistered companies), shall apply in relation to the Board subject to the modifications set out in paragraphs 4, 5, 6, 7 and 8 of the Second Schedule to the Act.

81. Contributions under paragraph 7 of the Second Schedule to the Act shall be payable as follows :—

(a) a contribution shall be payable by each person liable to contribute of an amount proportional to the sum of the two following quantities, that is to say, the quantity of live stock in his possession on the fourth day of June occurring in the relevant period and the quantity of live stock in his possession on the fourth day of December in the relevant period, but not exceeding three pence for each unit of quantity of live stock ;

(b) if sufficient cannot be obtained under the foregoing provisions of this paragraph, each person liable to contribute shall pay such sum not exceeding sixpence as may be necessary to make good the deficiency.

PART XI.—MISCELLANEOUS.

82. Subject to the provisions of this paragraph, in computing for the purposes of any provision of this Scheme the quantity of live stock in the possession of any person on any date or the quantity of live stock in the possession of any person in any sub-district on any date—

(a) those animals and those animals only shall be taken into account which, whether owned by that person or not, are at noon on that date being kept, in England or, as the case may be, in that sub-district, for the purpose of being bred from or sold in an improved condition, either on land in the occupation of that person or by that person on common land ;

(b) each sheep or lamb shall be treated as equivalent to two units of quantity, each pig as equivalent to three units of quantity, each cow in calf or in milk, each heifer in calf and each calf under six months old as equivalent to four units of quantity and each other head of cattle as equivalent to ten units of quantity :

Provided that—

(i) for the purposes of the provisions of this Scheme relating to contributions, if the date is between the fourth day of June and the third day of December (both inclusive), sheep and lambs shall be left out of account ;

(ii) where under any provision of this Scheme, the sum of the two following quantities has to be ascertained (either generally or in relation to a sub-district), that is to say the quantity of live stock in the possession of a person on a fourth day of June and the quantity of live stock in his possession on a fourth day of December, then in computing the quantity of live stock in his possession on the fourth day of June, sheep and lambs shall be left out of account, and where under any provision of this Scheme twice the quantity of live stock in the possession of a person on any date has to be taken in lieu of the sum of two such quantities as aforesaid, then, in computing the quantity of live stock in his possession on that date, each sheep or lamb shall be treated as equivalent to one unit of quantity only.

83. (1) Any producer who is aggrieved by any act or omission of the Board may refer the matter to the arbitration of a single arbitrator to be agreed upon between him and the Board, or in default of agreement, to be nominated by the Minister on the application of either party, and the arbitrator may make such order in the matter as he thinks just.

(2) The Arbitration Act, 1889, shall apply in relation to every such arbitration.

84. Any requirement of this Scheme that a document shall be sent to or served on a person by the Board shall be deemed to have been complied with if within the period (if any) limited for the sending or service of the document, the document is dispatched to him by post, properly addressed and with the postage prepaid.

85. For the purposes of the Act and this Scheme :—

(a) the sale of any agricultural product wholly or partly manufactured or derived from live stock shall be deemed to be a sale of live stock if the substance of the transaction between the seller and the buyer is that the seller, being in possession of live stock, agrees to subject it or cause it to be subjected to some process and sell the resulting product to the buyer ;

(b) without prejudice to the foregoing provisions of this paragraph, a person shall be deemed to sell live stock if he sells the carcasses of any live stock produced by him.

86. Where by reason of a registered producer dying or becoming subject to some legal disability or entering into a composition or scheme of arrangement with his creditors, any property in or control of any live stock is transferred from him to a personal representative, trustee, committee or other person, the personal representative, trustee, committee or other person shall, notwithstanding that he is not a producer or is exempt from registration :—

(a) until he has disposed of the live stock so transferred to him, be deemed for the purposes of Part III of this Scheme to be a producer and not to be exempt from registration ; and

(b) as respects that live stock be deemed for the purposes of sub-sections (3) and (4) of section six of the Act, and paragraphs thirty-nine to forty-three and eighty-three of this Scheme, to be a producer and not to be exempt from registration :

Provided that on the day of the transfer and for seven days thereafter, the personal representative, trustee, committee, or other person may, whether or not he is a producer and whether or not he would, apart from the provisions of this paragraph, be exempt from registration, do without being registered anything in relation to the live stock so transferred which the registered producer might have done.

87. The validity of any election either of a member of the Board or of a sub-district representative shall not be called in question except in proceedings commenced within one month from the day on which the result of the election was declared.

SCHEDULES.

FIRST SCHEDULE.

Districts and Sub-Districts.

1. There shall be seven districts bearing respectively the names mentioned in the first column of the Table set out below.

2. Each of the districts shall, subject to the provisions of this Schedule, consist of the sub-districts described opposite thereto in the second column of the said Table.

3. Each sub-district shall, subject to the provisions of Part II of this Scheme, have such number of sub-district representatives as are specified opposite thereto in the third column of the said Table.

4. If the boundaries of any administrative county or county borough are altered, references in the said Table to that county or county borough shall be construed as references to that county or county borough as so altered.

5. If any new county borough is created, it shall be treated as within the same sub-district that the land comprised therein, or the greater part thereof, was within immediately before it became a county borough; and a declaration of the Board that the greater part of the land within a county borough so created was, immediately before it became a county borough, within a particular sub-district shall be conclusive evidence of the fact for the purposes of this Scheme.

TABLE

District.	Sub-district.	Number of sub-district representatives.
1. South-Western	1. The administrative county of Somerset and the county boroughs of Bath and Bristol	5
	2. The administrative county of Dorset	2
	3. The administrative county of Devon and the county boroughs of Exeter and Plymouth	8
	4. The administrative county of Cornwall (including the Isles of Scilly)	6
2. South-Eastern	1. The administrative county of Kent and the county borough of Canterbury	5
	2. The administrative counties of London, Middlesex and Surrey and the county borough of Croydon	2
	3. The administrative counties of East Sussex and West Sussex and the county boroughs of Brighton, Eastbourne and Hastings	4
	4. The administrative county of Berkshire and the county borough of Reading	2

District.	Sub-district.	Number of sub-district representatives.
2. South-Eastern —(contd.)	5. The administrative county of Southampton and the county boroughs of Bournemouth, Portsmouth and Southampton 3 6. The administrative county of the Isle of Wight 1 7. The administrative county of Oxford and the county borough of Oxford ... 3 8. The administrative county of Buckingham 3 9. The administrative county of Bedford 2 10. The administrative county of Hertford 2 11. The administrative county of Wiltshire 3	
3. Eastern ...	1. The administrative county of Norfolk and the county boroughs of Norwich and Great Yarmouth 12 2. The administrative counties of East Suffolk and West Suffolk and the county borough of Ipswich 8 3. The administrative county of Essex and the county boroughs of East Ham, Southend-on-Sea and West Ham ... 6	
4. East Midland	1. The administrative county of the Parts of Holland 2 2. The administrative county of the Parts of Kesteven 3 3. The administrative county of the Parts of Lindsey and the county boroughs of Grimsby and Lincoln ... 6 4. The administrative county of Nottingham and the county borough of Nottingham 3 5. The administrative county of Derby and the county borough of Derby ... 3 6. The administrative county of Leicester and the county borough of Leicester 4 7. The administrative county of Rutland 1 8. The administrative counties of Northampton and the Soke of Peterborough and the county borough of Northampton 5 9. The administrative county of Huntingdon 2 10. The administrative counties of Cambridge and the Isle of Ely ... 2	

District.	Sub-district.	Number of sub-district representatives.
5. West Midland	<ol style="list-style-type: none"> 1. The administrative county of Chester and the county boroughs of Birkenhead, Chester, Stockport and Wallasey ... 2. The administrative county of Salop... 3. The administrative county of Stafford and the county boroughs of Burton-upon-Trent, Dudley, Smethwick, Stoke-on-Trent, Walsall, West Bromwich and Wolverhampton ... 4. The administrative county of Warwick and the county boroughs of Birmingham and Coventry ... 5. The administrative county of Worcester and the county borough of Worcester. ... 6. The administrative county of Gloucester and the county borough of Gloucester ... 7. The administrative county of Hereford 	<p style="text-align: right;">3</p> <p style="text-align: right;">6</p> <p style="text-align: right;">4</p> <p style="text-align: right;">3</p> <p style="text-align: right;">3</p> <p style="text-align: right;">4</p> <p style="text-align: right;">4</p>
6. Northern ...	<ol style="list-style-type: none"> 1. The administrative county of Cumberland and the county borough of Carlisle 2. The administrative county of Northumberland and the county boroughs of Newcastle-upon-Tyne and Tynemouth 3. The administrative county of Durham and the county boroughs of Darlington, Gateshead, South Shields, Sunderland and West Hartlepool ... 4. The administrative county of Westmorland ... 5. The administrative county of Lancaster and the county boroughs of Barrow-in-Furness, Blackburn, Blackpool, Bolton, Bootle, Burnley, Bury, Liverpool, Manchester, Oldham, Preston, Rochdale, St. Helens, Salford, Southport, Warrington and Wigan ... 6. The administrative county of the East Riding of Yorkshire and the county borough of Kingston-upon-Hull ... 7. The administrative county of the North Riding of Yorkshire and the county borough of Middlesbrough ... 8. The administrative county of the West Riding of Yorkshire and the county boroughs of Barnsley, Bradford, Dewsbury, Doncaster, Halifax, Huddersfield, Leeds, Rotherham, Sheffield, Wakefield and York ... 	<p style="text-align: right;">5</p> <p style="text-align: right;">5</p> <p style="text-align: right;">3</p> <p style="text-align: right;">2</p> <p style="text-align: right;">4</p> <p style="text-align: right;">4</p> <p style="text-align: right;">6</p> <p style="text-align: right;">6</p>

District.	Sub-district.	Number of sub-district representatives.
7. Wales	1. The administrative county of Anglesey	2
	2. The administrative county of Brecknock	2
	3. The administrative county of Caernarvon	2
	4. The administrative county of Cardigan	3
	5. The administrative county of Carmarthen	3
	6. The administrative county of Denbigh	3
	7. The administrative county of Flint	2
	8. The administrative county of Glamorgan and the county boroughs of Cardiff, Merthyr Tydfil and Swansea	2
	9. The administrative county of Merioneth	2
	10. The administrative county of Monmouth and the county borough of Newport	2
	11. The administrative county of Montgomery	3
	12. The administrative county of Pembroke	4
	13. The administrative county of Radnor	2

SECOND SCHEDULE.

MATTERS IN CONNECTION WITH WHICH DECISIONS OF THE EXECUTIVE COMMITTEE REQUIRE THE CONFIRMATION OF THE BOARD.

1. The number of sub-district representatives to be elected for any sub-district.
2. The quorum of any district committee.
3. The appointment, remuneration, terms of service, functions and dismissal of officers whose remuneration exceeds seven hundred and fifty pounds per annum.
4. Borrowing, lending, and the giving and withdrawal of guarantees.
5. The exercise of any powers conferred on the Board by paragraphs forty to forty-five, forty-seven, forty-eight, and fifty-one of this Scheme, or by any order of the Minister under any Act.
6. The imposition of penalties on registered producers.
7. Claims by registered producers for compensation.
8. The amendment or revocation of this Scheme or any addition to the powers of the Board thereunder.
9. Communications to and from any Consumers' Committee or Committee of Investigation.
10. Development Schemes.
11. Legal proceedings and arbitrations (except the taking of such steps as appear to the Executive Committee to be necessary to safeguard the position of the Board until the decision of the Board can be obtained).

THIRD SCHEDULE.

FORM OF VOTING PAPER.

The Live Stock (England) Marketing Board.

(a) The Board must fill in the name and address of the registered producer.

To (a)

(b) The Board must fill in the question on which the poll is being taken.

1. A poll is being held under the Live Stock (England) Marketing Scheme, 1934, on the following question, viz.
 (b)
 Do you wish this question to be answered "Yes" or to be answered "No" ? (Answer Yes or No)

(c) The Board must fill in the year in which the 4th June last preceding the qualifying date falls.

2. On the 4th June (c) were you a producer in England or Wales of pigs, sheep or cattle ? (Answer Yes or No)

(d) The Board must fill in the year in which the 4th December last preceding the qualifying date falls.

3. On the 4th December (d)..... were you a producer in England or Wales of pigs, sheep or cattle ? (Answer Yes or No)

4. If your answers to questions 2 and 3 are both "Yes," state how many of the animals mentioned below (whether owned by you or not) were at noon on the dates mentioned below being kept in England or Wales, for the purpose of being bred from or sold in an improved condition, either on land then in your occupation or by you on common land.

4th June (c) Pigs.
 Cows in milk or in calf, heifers in calf and calves under six months old.

..... Other Cattle.

4th December (d) Pigs.
 Sheep or Lambs.
 Cows in milk or in calf, heifers in calf and calves under six months old.

..... Other Cattle.

(e) The Board must fill in the qualifying date.

5. If either your answer to question 2 or your answer to question 3 is "No" state how many of the animals mentioned below (whether owned by you or not) were at noon on (e)..... being kept in England or Wales for the purpose of being bred from or sold in an improved condition, either on land then in your occupation or by you on common land.

..... Pigs.
 Sheep or Lambs.
 Cows in milk or in calf, heifers in calf and calves under six months old.
 Other Cattle.

6. On (e) did your pasture land in England and Wales exceed five acres (do not include common land, but otherwise treat as yours all pasture land on which you had any right, either alone or together with others, to graze pigs, sheep or cattle)? (Answer Yes or No)

7. If your answer to question 6 is "No," state how many pigs, sheep or lambs and cattle produced by you in England or Wales you sold in the twelve months ending on (e).....

- Pigs.
- Sheep or Lambs.
- Cattle.

Signature of registered producer

Address

.....

(f) The Board must fill in the address of their office.

(g) The Board must fill in the fourteenth day after the qualifying date.

N.B.—Your votes will not count unless this paper, properly filled in and signed, reaches the office of the Live Stock (England) Marketing Board (f).....

on or before (g).....
If you wilfully make any mis-statement in filling up this paper, you will render yourself liable to imprisonment and a heavy fine.

For the Live Stock (England) Marketing Board.

.....

Secretary.

Note.—Questions 6 and 7 should be omitted from the form except in the case of the initial poll.



APPENDIX B.
SUGGESTED CENSUS FORM.

County Parish or Township Name of Occupier..... Name or Address of Holding Holding Number	(Space for instruction as to return.)
State the number of the following classes of live stock on your farm*	
<div style="text-align: center;"> on $\frac{4th\ June.}{4th\ December.}$ </div> A. CATTLE. 1. Cows and heifers in milk 2. Cows in calf, but not in milk 3. Heifers <i>in calf for the first time</i> 4. Bulls being used for service 5. Other Cattle—Under 12 months (including calves) 6. " " 12 months and under 18 months 7. " " 18 months and under 24 months 8. " " 24 months and under 30 months 9. " " 30 months and over	NUMBER.
Total Cattle	
B. SHEEP. 10. Ewes 11. Rams and ram lambs 12. Lambs (6 months and under) 13. Sheep or lambs (over 6 months and not exceeding 12 months) 14. Other sheep	
Total Sheep	
State here the number of lambs born since last $\frac{4th\ December}{4th\ June}$	
C. PIGS. 15. Boars 16. Sows and gilts in pig 17. Other sows and gilts 18. Pigs (under 2 months) 19. Pigs (2 months and under 4 months) 20. Pigs (4 months and over)	
Total Pigs	
* Note.—Include all stock being fed on your farm (including any not owned by you) and any stock owned by you which are grazing on common land. Do not include stock owned by you but being fed on land in the occupation of another person.	

SUGGESTED FORECAST FORM.

County	(Space for instruction as to return.)	
Parish or Township		
Name of Occupier		
Name or Address of Holding		
Holding Number		
<p><i>Note.</i>—This form applies only to stock which you expect to <i>Sell for Slaughter</i>. Include any stock owned by you and any stock which you are fattening under a feeding agreement, on hire purchase or other credit arrangement.</p>		
A. CATTLE.		
<p><i>State the number of cattle on your farm which you anticipate will be sold ready for slaughter and which will be 12 months or over at time of sale :—</i></p>	Number of	
	Cows, heifers† and bulls.	Other Cattle.
(1) Between 1st June and 31st August, 19 ...		
(2) Between 1st September and 30th November, 19		
† Maiden heifers should be entered as "other cattle."		
B. PIGS.		
<p><i>State the number of pigs on your farm which you anticipate will be sold between 1st June and 31st August, 19 :—</i></p>	Number of Pigs.	
(3) On contract to bacon curers or to the Pigs Marketing Board		
(4) For slaughter otherwise than under (3)		

(*Note.*—For illustration purposes this form has been drawn up as for completion at the same time as the summer census.)

APPENDIX C.
**SUGGESTED FORM OF NOTIFICATION OF INTENDED
 SALE BY AUCTION.**

LIVE STOCK MARKETING BOARD. <i>Local Agent</i>		Name of Registered Producer Number Address			
		NORMAL ENTRY* LATE ENTRY* * Delete as necessary.			
ENTRY FORM FOR SALE OF LIVE STOCK AT AUCTION. <i>Normal entries must be received at the office of the Local Agent of the Board one clear week before the date of sale ; late entries can be made at any time up to the time of the sale, subject to any conditions which may be prescribed by the Board.</i>					
PARTICULARS OF ENTRIES.					
<i>Market to which stock are to be consigned.</i>	<i>Auctioneer to whom stock are to be consigned for sale.</i>	<i>Date of sale.</i>	<i>Class of live stock Here give such particulars as to description, breed, approximate weight, etc. as the Board requires.</i>	<i>Number of each class of live-stock.</i>	<i>Reserve Price (if any).</i>
Subject to the acceptance of the above entries by the Board, I undertake to consign and offer for sale the above live stock in accordance with the above particulars of entry and to abide by the Board's conditions of sale.					
<i>Date of Entry</i> <i>Signed</i>					
Acceptance of Entries. <i>Normal Entries.</i> —Normal entries are valid unless you are informed to the contrary not less than 4 days before the date of sale. <i>Late Entries.</i> —Late entries are not valid unless you are notified by the Board of the acceptance of such entries.					

(Note.—Conditions of Sale (including conditions as to entry, entry fees, etc.) might be printed on the other side of the form.)

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POULTRY
FLOUR
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FRESH FRUIT
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JAM
HONEY
CIDER
CHESHIRE CHEESE
FRESH VEGETABLES
CANNED VEGETABLES
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VEGETABLES
BEEF

DISTRIBUTORS will find that the National Mark stands for up-to-date methods and for that reliability of quality, grade, weight and pack which modern business requires.

