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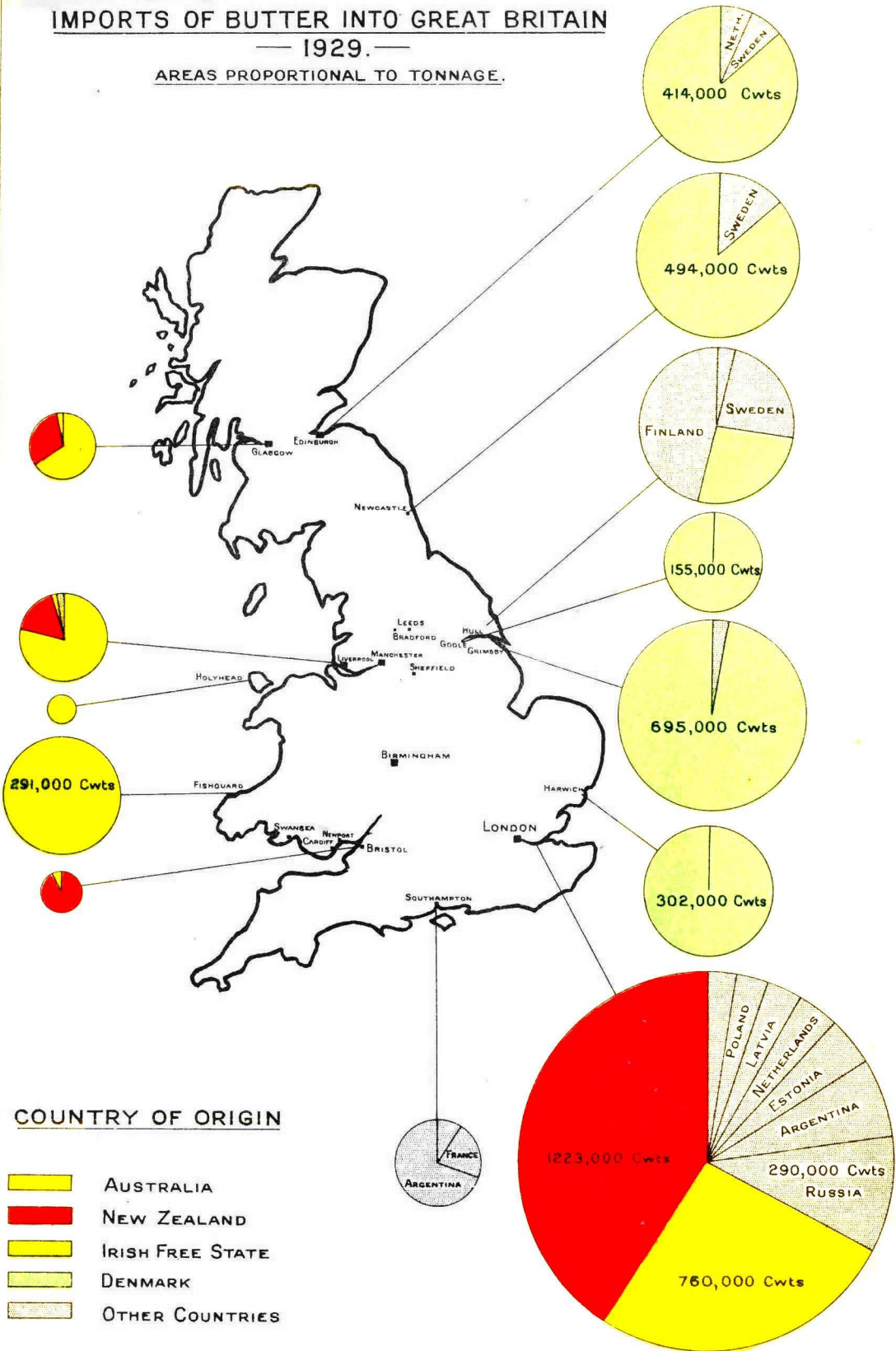
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IMPORTS OF BUTTER INTO GREAT BRITAIN — 1929. —

AREAS PROPORTIONAL TO TONNAGE.



FOREWORD.

THE need for a more thorough study of the retail demand for Empire products has been emphasised both by the Imperial Economic Committee and by the Agricultural Economics Committee of the Empire Marketing Board. It is of considerable importance to oversea producers to understand the working of the agencies through which their produce passes, and to ascertain as closely as possible the preferences of consumers in the matter of quality, grading and presentation.

The retail trade constitutes a particularly difficult problem for study since so little exact knowledge is available. The number of retailers selling foodstuffs is very large, and they do not specialise in the sale of a few commodities as in the wholesale trade. Further, retail shops differ greatly in size, type of management, class of trade, and in many other respects. It is impossible, therefore, by reference to a few firms only, to obtain a clear picture of the variations in conditions and in policy; it is necessary to study the practice of a large number of shops before reliable knowledge of the retail marketing of even one commodity can be obtained.

The Empire Marketing Board has accordingly set on foot a systematic study of the retail demand for certain Empire products, starting with those on which the Imperial Economic Committee have already published the results of their more general survey.

The present report on the Demand for Empire Butter is the second of the series, and follows a similar study published a year ago on the Demand for Cheese in London (E.M.B.22). The object of the enquiry was to examine the position of Empire butters in the retail shops of the main centres of population in the United Kingdom, and to estimate the extent and nature of the competition from butters of foreign origin. The investigation extended over the greater part of the year 1929.

The information was obtained by interview with the proprietors or managers of the retail shops visited, and the Board has been gratified with the sympathetic response with which the enquiry has been received by the Trade. Acknowledgment and thanks are here given to members of the wholesale and retail distributive trades for the assistance they so willingly afforded.

Economic Section,
Empire Marketing Board.

October, 1930.

THE DEMAND FOR EMPIRE BUTTER.

I.—INTRODUCTION.

Import of Butter.

The import of butter into the United Kingdom in 1929 was about 6½ million cwts. ; according to the last official estimate in 1925, home production was about 850 thousand cwts.

The chief sources of imports in 1929 were as follows:—

New Zealand	..	..	..	..	20 per cent.
Australia	..	..	..	..	12 „
Irish Free State	..	..	..	..	9 „
Other Empire	..	..	..	..	1 „
					—
Total Empire Countries	..	..	..	..	42 „
					—
Denmark	..	..	..	..	34 per cent.
Other European	..	..	..	..	19 „
Argentina	..	..	..	..	5 „
					—
Total Foreign Countries	..	..	..	..	58 „
					—

The most notable development of the import trade during this century has been the rapid growth in the quantities arriving from New Zealand. Supplies from Australia have also increased considerably. Canada on the other hand has practically ceased to export butter to this country. South Africa has lately begun to export small quantities, about 12 thousand cwts. being received in 1929. The total import of butter in 1929 was nearly 2½ million cwts. above the average for the years 1909–13 ; over three-quarters of this rise was accounted for by Empire butters, and nearly half by imports from New Zealand.

The seasonal nature of the trade with oversea Empire countries is illustrated in Figure II, which shows the average monthly imports of butter for the five years 1925–29.

In 1929, 74 per cent. of the import of butter from the Irish Free State arrived in the five months June–October, whereas in these months 17 per cent. of the New Zealand and Australian imports were

received. New Zealand supplies reached their maximum of 255 thousand cwts. (one-fifth of the total for the year) in March, while Irish Free State shipments were lowest between January and March.

From Denmark, the imports were fairly evenly distributed throughout the year, though they were slightly higher in the summer.

Period and Scope of Enquiry.

The object of the enquiry was to examine the position of Empire butters in the retail shops of the main population centres, to estimate the extent and nature of the competition from butters of foreign origin, and to obtain information on certain aspects of retail policy in relation to regional preferences.

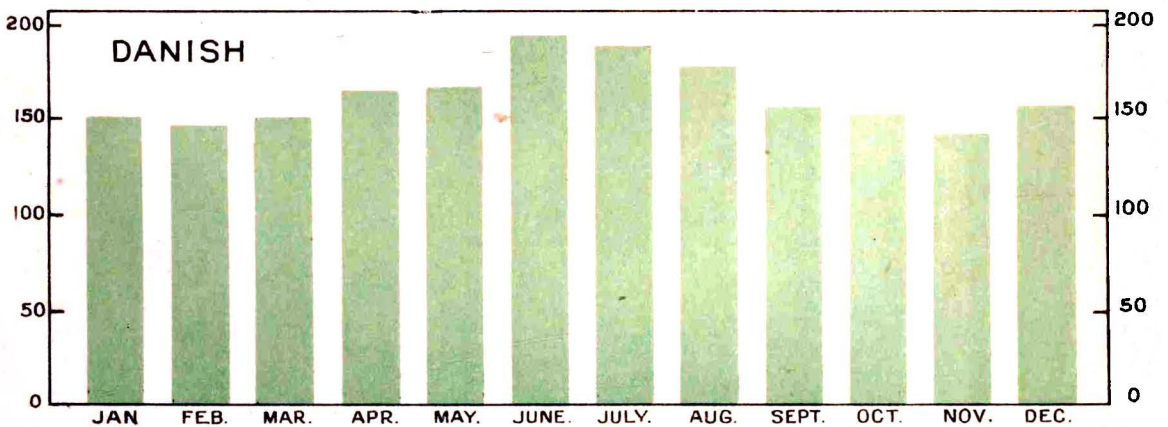
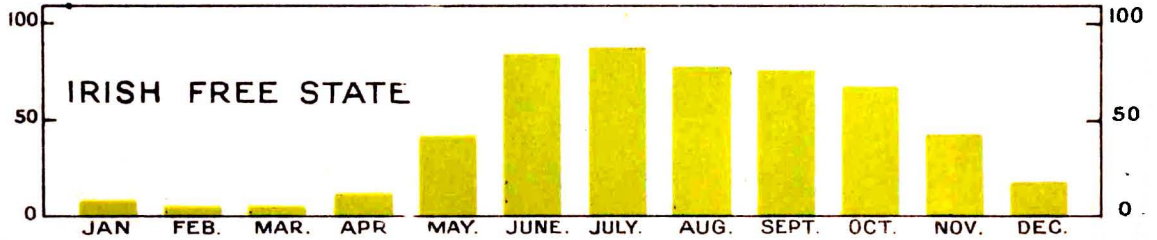
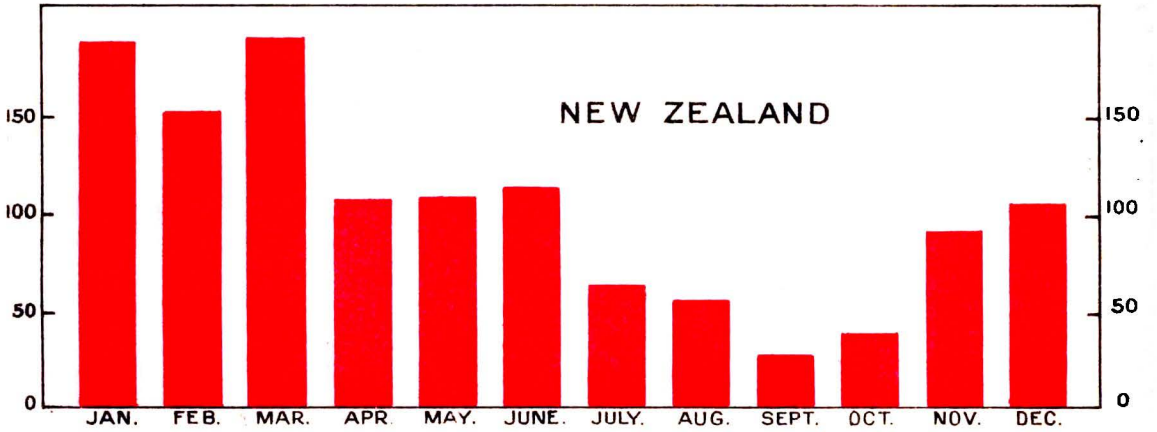
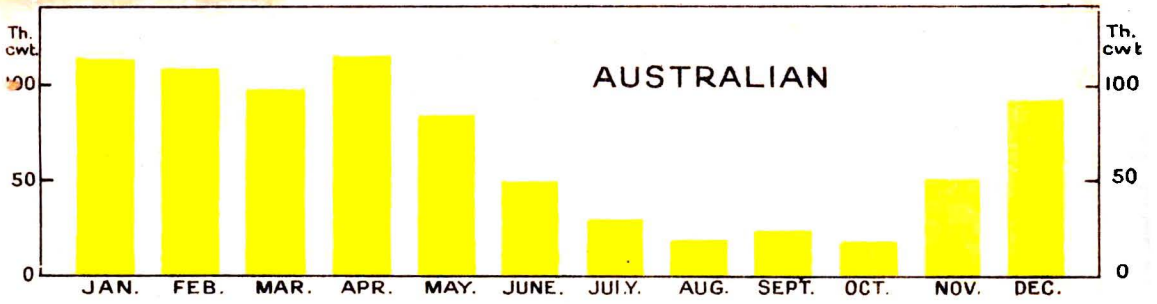
In view of the seasonal variation in the supply of Empire butters, the enquiry was undertaken in two parts; the first survey from April to June, and the second from July to September, 1929. In this way it was hoped to secure a picture of retail market conditions; in the first case when supplies of New Zealand and Australian butters were relatively plentiful, and in the second case when the butter export season of the Irish Free State was at its height. The shops were visited in the same order once in each period, and the area surveys were carried out simultaneously except in Scotland, Bristol and South Wales, where the first round of enquiries was rather later than the others. On the whole, therefore, a comparison of the nature of the stocks held at each period may be taken to reflect fairly accurately the seasonal interchange, but allowance must be made for the fact that, in some of the shops visited towards the end of the First Survey, the change-over may already have begun to operate.

The enquiry was conducted in 18 towns, the total population of the districts covered being approximately twelve millions. In all, 2,918 shops were visited and information was obtained, according to a standard questionnaire, by personal interview with the proprietor or manager of the shop.

From a preliminary inspection of the returns, it was found possible to group the towns into seven roughly homogeneous areas, as shown in Table I.

In apportioning the number of visits in each town, consideration was taken of population and local conditions, and an attempt was made to include a fair representation of each type of organisation, size of shop, and class of trade.

Fig. 2.



MONTHLY IMPORTS OF BUTTER INTO THE UNITED KINGDOM.
FIVE YEAR AVERAGE 1925-9.

TABLE 1.

Area.	Towns.	Number of Shops Visited.
London	Administrative County	546
Bristol and South Wales..	Bristol, Cardiff, Newport, Swansea ..	399
Birmingham	Birmingham, Wolverhampton	333
Liverpool	Liverpool, Birkenhead	211
Manchester	Manchester, Blackburn, Bolton, Wigan ..	573
Yorkshire	Bradford, Leeds, Sheffield	441
Scotland	Edinburgh, Glasgow	415
Total All Areas		2,918

As the required information as to volume of sales could not be obtained with sufficient accuracy, no attempt has been made to "weight" the returns from individual shops according to this measure, or the samples of groups according to their relative importance. On those questions in which there is marked divergence, generalisations have been avoided and the results have been presented separately.

Classification of Shops.

For the purpose of analysis, the shops visited have been classified according to type of organisation and class of trade.

In regard to organisation, the term *independent* has been taken to refer to a firm with a single shop; this first group of 1,330 shops constituted about 46 per cent. of the total and included five large department stores. The second group included branches of co-operative societies, multiple grocers and dairies. The multiple grocery and provision group may be roughly sub-divided into *local multiple*, where the branches are confined to a particular area; and *non-local multiple* with branches in more than one area, thus including organisations with branch shops in all parts of the country. Of the 1,588 shops in the second group, about 40 per cent. were of the local multiple and co-operative types, 45 per cent. were non-local, and 15 per cent. were dairies.

The classification according to class of trade was necessarily somewhat arbitrary, but for certain purposes it has been possible to secure a reasonable basis of comparison. A variety of factors was taken into account, such as the character of the district in which the shop was situated; the method of trading, *i.e.*, whether cash, credit, counter, or delivery; and the nature of the stocks carried. On this basis, the trade of about 10 per cent. of the shops has been classified as "high"; 60 per cent. as "middle", and 30 per cent. as "low".

II.—TYPES OF BUTTER STOCKED.

Bulk and Packeted.

The term "Packeted Butter" is used throughout this report to refer to butter sold in packets bearing a proprietary name or brand; the term thus includes all packeted butter whether blended or not.

Packeted butter as thus defined was bought by the retailer in packeted form, except in the case of co-operatives and a few multiple organisations where the packeting was done at the central warehouses.

During the course of the enquiry, 58 different brands of packeted butter were encountered, but these varied greatly in the extent of their distribution and sales. One brand was found in over 200 shops, and another in 135 shops.

TABLE 2.—*Percentage of Shops in Each Area stocking Bulk and Packeted Butters.*

Area.	Bulk only.	Bulk and Packeted.	Packeted only.
London	47	25	28
Bristol and South Wales	82	16	2
Birmingham	54	40	6
Liverpool	76	8	16
Manchester	77	19	4
Yorkshire	75	20	5
Scotland	73	22	5
All Areas	69	22	10

Packeted butter was found chiefly in dairies and in the smaller independent shops ; 59 per cent. of the dairies were selling no butter in bulk form. Of the co-operative stores visited, 41 per cent. were stocking packeted butter but nearly always in conjunction with bulk. Large multiple firms were seldom found to stock packeted butter, but some of their bulk butters were sold under proprietary names.

It will be seen that London was the only area where packeted butter was found in more than half the shops visited. A similar position, however, was observed in Edinburgh where 61 per cent. of the shops were stocking packeted butter, but the very low percentage in Glasgow brings the average for Scotland to the level of the other Northern areas. The high percentages in these cities are partly accounted for by the relatively high proportion of dairies visited, but in all types of shop, packeted butter was more widely stocked in London and Edinburgh than elsewhere.

Over the whole country, packeted butter was stocked much more frequently in the high and middle-class shops than in the low-class shops. The average price was usually about two pence per pound higher than that of any other butter except Farm butter.

The proportion of butter sold in packeted form does not appear to be relatively large ; the shops selling only packeted were mostly small dairies, and where both bulk and packeted were sold in the same shop, it was usually stated that the sales of bulk butter were by far the more important. There was a slight preponderance of opinion in the trade to the effect that the popularity of the packeted article was growing, but 85 per cent. of the retailers selling packeted butter stated that they had experienced no appreciable change.

Number of Types of Butter Stocked.

Retail practice in regard to the number of butters stocked varies with the season of the year, the size and kind of shop, the nature of the trade and the area or district. In this section, the various butters have been grouped into types according to the country of origin, with the exceptions of Northern Ireland and Irish Free State butter which has been counted as one type, and bulk-blended and packeted butter each of which is counted as a single type. No account has been taken in this classification of variations within each type. It is a common practice, particularly in the Northern areas, for a shop to stock a salt and a fresh butter, or, less commonly, two different grades of the same type.

TABLE 3.—Percentage of Shops in Each Area stocking One, Two, Three or more Types of Butter.

Area.	One Type.	Two Types.	Three Types.	More than Three Types.
London	38	43	14	6
Bristol and South Wales ..	41	47	12	1
Birmingham	14	31	41	15
Liverpool	41	50	6	2
Manchester.. .. .	53	35	12	1
Yorkshire	70	27	3	—
Scotland	59	37	3	1
All Areas	47	38	12	3

Table 3 is taken from the figures for the First Survey; as the position in the Second Survey was not appreciably different, it has not been recorded here.

It will be seen that only 15 per cent. of the total number of shops visited were stocking more than two types of butter, the remainder being fairly evenly divided between one and two types. In the Northern areas with the exception of Liverpool, the majority of the shops were stocking only one type. Birmingham was peculiar in that more shops were stocking three types than two.

Generally speaking, independent shops were found to stock fewer types than branches of multiple organisations.

TABLE 4.—Percentage of Independent and Multiple Shops stocking One, Two, Three or more Types of Butter.

Organisation.	One Type.	Two Types.	Three Types.	More than Three Types.
Independent	56	32	9	3
Multiple	39	43	15	4
All Shops	47	38	12	3

Dairies were mainly stocking one type, usually packeted butter ; but the co-operative group of shops was more or less evenly divided between one, two and three types.

In general, the higher the class of trade of the shop, the greater the number of types stocked.

Country of Origin.

Butter is imported into the United Kingdom through three main channels ; Australian and New Zealand butters chiefly through London ; Irish butter through the ports on the West coast ; and European butters, mostly from Denmark, through the ports on the East coast.

Table 5 shows the main ports of entry for Australian, New Zealand, Irish Free State and Danish butters during the year 1929. This table forms the basis of Figure I.

TABLE 5.—*Imports of Butter into the United Kingdom, 1929.*

Country.	Australia.	New Zealand.	Irish Free State.	Denmark.	Total Imports.
Total Imports	Th. cwt. 768	Th. cwt. 1,313	Th. cwt. 566	Th. cwt. 2,204	Th. cwt. 6,397
<i>Port.</i>	Per cent.	Per cent.	Per cent.	Per cent.	Per cent.
London	99·0	93·8	2·2	0·3	44·8
Liverpool	0·4	2·0	21·2	—	2·4
Bristol	—	2·2	0·6	—	0·5
Cardiff	—	—	0·2	—	—
Goole	—	—	—	7·0	2·4
Grimsby	—	—	—	31·5	11·1
Harwich	—	—	—	13·7	4·7
Hull	0·2	—	—	6·2	8·0
Manchester	—	—	0·4	0·1	0·1
Newcastle-on-Tyne ..	—	—	—	22·3	8·9
Fishguard	—	—	51·4	—	4·6
Holyhead	—	—	2·7	—	0·2
Glasgow	0·4	1·9	9·0	—	1·2
Leith	—	—	—	18·7	7·5
Belfast	—	—	0·2	—	—
Northern Ireland Land Boundary Stations ..	—	—	11·9	—	1·1

The main markets for each type of butter tend to be grouped round the ports of entry and, though the areas are not well defined, the following rough divisions may be drawn :—

- (1) The South and South-West, where Empire butter, chiefly Australian and New Zealand, predominates.
- (2) The West and North-West, where the bulk of the Irish supplies are marketed in the summer, and considerable quantities of New Zealand in the winter.
- (3) The East and North-East, where continental butter, chiefly Danish, predominates.

First Survey.—The following table shows the distribution of the various types of butter in the areas covered during the First Survey, April–June, 1929.

TABLE 6.—Percentage of Shops in each Area Stocking the Various Types of Butter (First Survey, April–June, 1929).

	London.	Bristol and South Wales.	Birmingham.	Liverpool.	Manchester.	Yorkshire.	Scotland.	All Areas.
Farm	6	3	2	1	—	2	5	3
Australian	16	8	29	7	8	2	—	10
New Zealand	49	54	64	54	24	8	9	35
Irish	3	52	5	10	3	2	17	12
Danish	12	14	83	63	84	80	80	58
Finnish	—	—	1	1	12	7	2	4
Siberian	1	4	12	—	1	1	—	2
Swedish	—	—	2	6	2	3	3	2
Ukrainian	—	4	—	1	1	2	—	1
Argentine	15	1	7	—	—	—	1	4
Other Countries	5	—	—	—	—	—	—	1
Bulk Blended	28	16	8	4	2	1	1	9
Packeted	53	18	46	24	23	25	27	32

The outstanding feature in this table is the predominance of Danish butter in the Northern areas. It should be noted that this may be a slight exaggeration of the real position which is somewhat obscured by the apparently frequent use of the term "Danish" as a trade designation synonymous with "Kiel" or "Cask", and therefore applicable to European butters not actually

from Denmark. After due allowance is made for possible modifications of this nature, however, it is apparent that in the Manchester, Yorkshire and Scotland areas, Danish butter is the staple type.

The geographical position of Birmingham appears to be reflected in the returns. It will be seen that though the majority of the shops were stocking Danish butter, a relatively large percentage also were stocking New Zealand and Australian.

The figures for London, and for Bristol and South Wales demonstrate the comparative popularity of Empire, packeted and blended butters in the South.

Second Survey.—The corresponding returns for the Second Survey reflect fairly closely the seasonal variation in supply. Danish remained much the same everywhere and the other foreign butters showed little significant change. Irish butter increased in most areas at the expense of New Zealand and Australian.

TABLE 7.—*Percentage of Shops in Each Area stocking the Chief Types of Butter (Second Survey, July–September, 1929).*

	London.	Bristol and South Wales.	Birmingham.	Liverpool.	Manchester.	Yorkshire.	Scotland.	All Areas.
Farm	4	3	2	1	—	2	5	2
Australian	7	2	4	1	3	1	—	3
New Zealand	41	48	64	11	14	9	8	28
Irish	21	52	13	56	10	2	19	22
Danish	12	15	83	62	83	80	83	59
Other Foreign	21	10	28	6	17	14	7	15
Bulk Blended	28	15	3	5	1	—	2	9
Packeted	52	18	46	24	22	24	24	31

A comparison of the results of the two Surveys is shown in Table 8.

Between the two Surveys, the number of shops stocking Irish butter almost doubled, the number stocking New Zealand dropped to four-fifths of the previous total, and the number stocking Australian to one-third. The resultant drop in the total numbers stocking New Zealand and Australian butters was somewhat greater than the increase in the numbers stocking Irish. The figures for farm butter and for bulk blended and packeted butters were almost unchanged.

TABLE 8.—*Increase or Decrease in the Percentage of Shops in Each Area stocking the Chief Types of Butter.*

	London.	Bristol and South Wales.	Birmingham.	Liverpool.	Manchester.	Yorkshire.	Scotland.	All Areas.
Farm	- 2	0	0	0	0	0	0	- 1
Australian .. .	- 9	- 6	- 25	- 6	- 5	- 1	0	- 7
New Zealand .. .	- 8	- 6	0	- 43	- 10	+ 1	- 1	- 7
Irish	+ 18	0	+ 8	+ 46	+ 7	0	+ 2	+ 10
Danish	0	+ 1	0	- 1	- 1	0	+ 3	+ 1
Bulk Blended .. .	0	- 1	- 5	+ 1	- 1	- 1	+ 1	0
Packeted	- 1	0	0	0	- 1	- 1	- 3	- 1

Of the areas, Liverpool showed the greatest changes, and Yorkshire the least. The changes in Scotland and in Bristol and South Wales were smaller than might be expected, but it is to be noted that the First Survey in these areas did not take place until the beginning of the Irish season.

In Birmingham the number stocking New Zealand butter remained almost the same, but there was an appreciable interchange as between Irish and Australian.

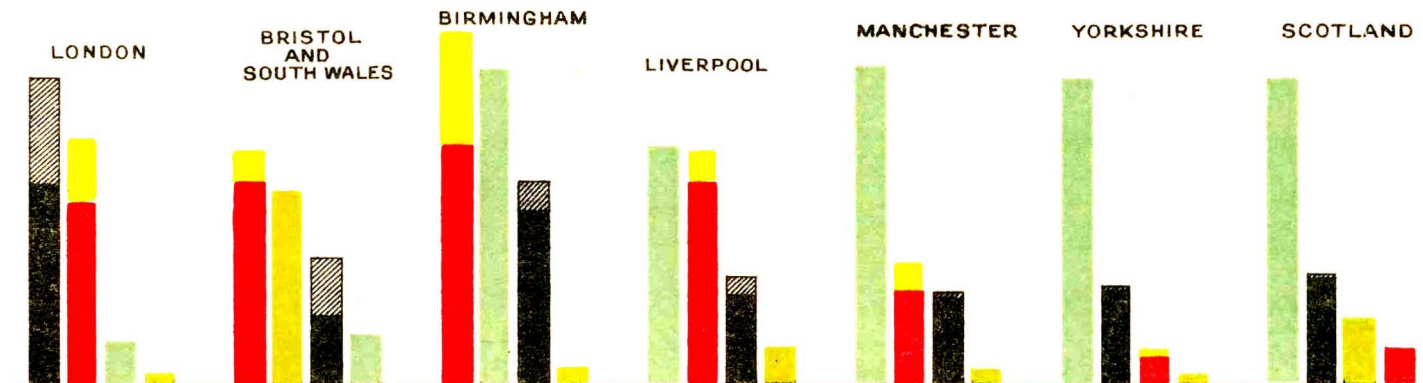
A further analysis of the figures according to organisation of the shops is shown in Table 9.

TABLE 9.—*Percentage of Independent and Multiple Shops stocking the Chief Types of Butter in the First and Second Surveys.*

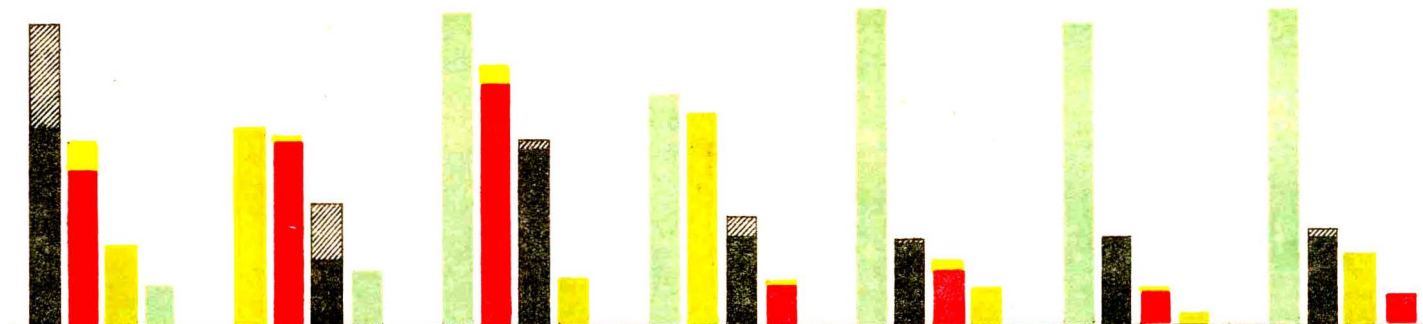
	Independent.		Multiple.	
	First Survey.	Second Survey.	First Survey.	Second Survey.
Farm	4	4	1	1
Australian .. .	8	3	11	3
New Zealand .. .	24	17	44	36
Irish	15	24	10	19
Danish	56	56	60	61
Other Foreign .. .	10	10	17	20
Bulk Blended .. .	6	6	12	11
Packeted	34	34	29	28

Figure III illustrates the main features of Tables 6 and 7.

FIRST SURVEY ; APRIL TO JUNE .



SECOND SURVEY ; JULY TO SEPTEMBER .



AUSTRALIAN DANISH
 NEW ZEALAND BULK BLENDED
 IRISH PACKETED

PROPORTION OF THE SHOPS IN EACH AREA STOCKING THE CHIEF TYPES OF BUTTER.

Fig. 3.

III.—INDIVIDUAL TYPES.

Farm Butter.

The annual production of butter in the United Kingdom was estimated in 1925 to be about 850 thousand cwts. This butter is retailed mostly in the country districts where it is produced, and comparatively small quantities appear to reach the larger population centres. During the enquiry, 78 shops or about 3 per cent. of the total number visited were stocking farm butter, and in every case the weekly sales were stated to be small. In the Manchester area, no farm butter was found.

Of the shops stocking farm butter, nearly three-quarters were Independents and most of the others were small dairies. None of the Non-Local Multiples was stocking this type of butter.

Australian Butter.

In 1929, the import of Australian butter was about 12 per cent. of the total imports of butter for the whole year, and about 9 per cent. of the total imports for the six months April-September.

The following tables show the distribution of the shops stocking Australian butter in the First and Second Surveys.

TABLE 10.—*Percentage of Independent and Multiple Shops in each Area stocking Australian Butter.*
(First Survey, April-June.)

	London.	Bristol and South Wales.	Birmingham.	Liverpool.	Manchester.	Yorkshire.	Scotland.	All Areas.
Independent	25	6	27	3	1	—	—	8
Multiple	10	9	31	9	14	4	—	11
All Shops ..	16	8	29	7	8	2	—	10

TABLE 11.—Percentage of Independent and Multiple Shops in each Area stocking Australian Butter.
(Second Survey, July-September.)

	London.	Bristol and South Wales.	Birmingham.	Liverpool.	Manchester.	Yorkshire.	Scotland.	All Areas.
Independent	12	2	6	1	1	—	—	3
Multiple	3	2	2	2	5	2	—	3
All Shops ..	7	2	4	1	3	1	—	3

Australian butter was most frequently found in branches of non-local multiple firms and in co-operative stores.

During the First Survey, it was stocked by 10 per cent. of the shops visited ; in the Second Survey this number had dropped to 3 per cent. The drop was most marked in Birmingham. In most cases it was replaced by Irish, but some retailers in the North changed to one of the minor European butters.

It will be seen from Tables 10 and 11 that Australian butter is considerably more popular in the Southern Areas than in the North. The largest percentage during the First Survey was in Birmingham, but the great majority of the shops there were selling only small quantities with a European butter as the chief line. In London, Australian butter was found in 16 per cent. of the shops, and in about half of these it was the main butter stocked. The Bristol and South Wales area was not surveyed until June when the Australian season was nearly over and thus the percentage recorded for that area is probably unduly low. The shops which were stocking Australian butter in the North generally sold it as a second line.

New Zealand Butter.

In 1929, the import of New Zealand butter was about 20 per cent. of the total imports of butter for the whole year, and about 13 per cent. of the total imports for the six months April-September.

The following tables show the distribution of the shops stocking New Zealand butter in the First and Second Surveys.

TABLE 12.—*Percentage of Independent and Multiple Shops in each Area stocking New Zealand Butter.*
(First Survey, April-June.)

	London.	Bristol and South Wales.	Birmingham.	Liverpool.	Manchester.	Yorkshire.	Scotland.	All Areas.
Independent	39	46	53	50	6	1	6	24
Multiple	58	61	71	56	37	17	13	44
All Shops	49	54	64	54	24	8	9	35

TABLE 13.—*Percentage of Independent and Multiple Shops in each Area stocking New Zealand Butter.*
(Second Survey, July-September.)

	London.	Bristol and South Wales.	Birmingham.	Liverpool.	Manchester.	Yorkshire.	Scotland.	All Areas.
Independent	30	39	53	2	2	1	4	17
Multiple	50	55	71	17	23	18	12	36
All Shops	41	48	64	11	14	9	8	28

From these tables it is apparent that New Zealand butter is more popular in the Southern than in the Northern areas. In the town of Bristol it was found in 86 per cent. of the shops visited, and in many of these cases it was the only butter or the chief butter stocked.

In Birmingham the percentage was also high (64 per cent.), but it was generally sold there only as a subsidiary line to Danish. Liverpool in the First Survey showed a higher percentage stocking New Zealand than the other Northern areas, but here again in more than half the instances it was sold as a second line and during the summer season it was almost entirely replaced by Irish.

In all areas New Zealand butter appeared to be more popular in the multiple and particularly the non-local multiple group of shops ; in London it was stocked in 90 per cent. of these shops. Very few dairies were stocking it, but a number of co-operative stores were selling it in conjunction with other types. It was found most frequently in shops doing a high or middle-class trade.

About one-fifth of the total number of shops stocking New Zealand in the First Survey had changed to some other type in the Second, and it appeared that many retailers were in the habit of stocking it regularly during the winter months only. In most cases where New Zealand was thus stocked as a regular winter line, Irish butter was stocked in the summer months.

In all the areas except Bristol and South Wales, New Zealand sales were usually less than those of other types stocked with it. In the Northern areas the chief line was commonly a European butter, but in London it was more often bulk-blended fresh butter.

Irish Butter.

The import of butter from the Irish Free State in 1929 was about 9 per cent. of the total butter imports. As it was found impossible to distinguish between Northern Ireland and Irish Free State butter in the returns from retail shops, the two types have been included in this report under the term "Irish". On this basis, the total supplies of Irish butter constituted about 10 per cent. of the total imports for the whole year, and about 13 per cent. of the total for the six months April-September.

Irish butter was found mainly in independent shops and in branches of local multiple firms.

The following tables show the distribution of the shops stocking Irish butter in the First and Second Surveys.

TABLE 14.—*Percentage of Independent and Multiple Shops in each Area stocking Irish Butter.*
(*First Survey, April-June.*)

	London.	Bristol and South Wales.	Birmingham.	Liverpool.	Manchester.	Yorkshire.	Scotland.	All Areas.
Independent	4	61	9	22	2	2	19	15
Multiple	2	43	1	2	3	2	15	10
All Shops ..	3	52	5	10	3	2	17	12

TABLE 15.—*Percentage of Independent and Multiple Shops in each Area stocking Irish Butter.*
(*Second Survey, July-September.*)

	London.	Bristol and South Wales.	Birmingham.	Liverpool.	Manchester.	Yorkshire.	Scotland.	All Areas.
Independent	26	62	18	76	5	1	21	24
Multiple	17	44	9	43	13	2	17	19
All Shops ..	21	52	13	56	10	2	19	22

Tables 14 and 15 bring out the increase in the quantity on the retail market in the summer; it will be noted, however, that the figures for Bristol and South Wales and for Scotland do not show this increase since, as already mentioned, the First Survey in these areas did not take place till after the Irish season had begun. It appeared

that most of the shops which stock Irish in the summer only are in the habit of changing to another Empire butter, either New Zealand or Australian, during the winter months.

In both Surveys the tendency to localisation on the west coast was very marked. The contrast between Edinburgh and Glasgow, for instance, is striking; in Edinburgh 3 per cent. and in Glasgow 28 per cent. of the shops visited were stocking Irish in the Second Survey. A somewhat similar contrast was observed as between Liverpool and Manchester. The Irish position was strongest in Cardiff, Newport and Swansea, where half the shops were selling no other butter, and of the remainder nearly half were selling more Irish than any other type.

Foreign Butters.

The most important of the foreign butters on the United Kingdom market is Danish. In 1929, the import of butter from Denmark was nearly 60 per cent. of the imports from foreign countries, and about one-third of the total butter imports.

The following table shows the distribution of the shops stocking Danish butter in the First Survey. Supplies of Danish butter show very little seasonal variation, and as the position in the Second Survey was almost unchanged, it is not recorded here.

TABLE 16.—*Percentage of Independent and Multiple Shops in each Area stocking Danish Butter.*
(*First Survey, April-June.*)

	London.	Bristol and South Wales.	Birmingham.	Liverpool.	Manchester.	Yorkshire.	Scotland.	All Areas.
Independent	2	3	80	69	79	88	83	56
Multiple	20	24	85	58	88	70	78	60
All Shops	12	14	83	63	84	80	80	58

From this table it will be seen that Danish butter is much more popular in the Northern than in the Southern areas, the difference being rather more marked in independent than in multiple shops. In shops where Danish was stocked together with other types, it was usually the chief line with the largest sales even in the Southern areas where it was by no means the staple butter.

Finnish butter was found in 12 per cent. of the shops in the Manchester area, and in 7 per cent. in the Yorkshire area, but in no great number elsewhere. In these areas it was stocked chiefly by Local-Multiples and Independents.

Siberian butter was found in a few multiple shops chiefly in Birmingham where it was most often stocked as a third line with Danish and either New Zealand or Argentine.

Swedish butter was found in a small number of shops, mostly Independents and Local Multiples, in all the areas except Bristol and South Wales.

Ukrainian butter was found only in the branches of one national multiple firm where it was sold as a second line with New Zealand.

Argentine butter was found in 15 per cent. of the shops in London and in a few in Birmingham. In London it was stocked as a cheaper line mostly by shops doing a low-class trade, but often its sales were stated to be larger than those of dearer types in the same shop.

IV.—EMPIRE AND FOREIGN.

The comparative sales of Empire and foreign butter in the retail shops differed widely in the areas surveyed. In Bristol and South Wales, 49 per cent. of the shops were selling only Empire butter, and 32 per cent. were selling an Empire type as their chief line. On the other hand, in Yorkshire only 16 per cent. of the shops were stocking Empire butter, and in the majority of these it was stated that the sales formed a very small proportion of the total. In Birmingham, 75 per cent. of the shops were stocking an Empire type, but in two-thirds of these the sales were said to be small, and a European butter was stocked as the chief line.

In Table 17 the shops visited have been classified into four groups according to the proportions of Empire and foreign butters sold. In this analysis, blended and packeted butters have not been included.

TABLE 17.—*Percentage of Shops in each Area selling various Proportions of Empire Butter.*
(First Survey, April-June.)

	London.	Bristol and South Wales.	Birmingham.	Liverpool.	Manchester.	Yorkshire.	Scotland.	All Areas.
<i>Only Empire Butter</i> ..	9	49	4	15	2	2	10	12
<i>More Empire than other Butters</i> ..	22	32	19	12	3	4	3	13
<i>Less Empire than other Butters</i> ..	30	8	52	39	28	10	20	25
<i>No Empire Butter</i> ..	39	11	25	34	67	85	67	50

The information obtained on this point is further analysed in Table 18 according to the type of organisation of the shops.

TABLE 18.—*Percentage of Independent and Multiple Shops selling various Proportions of Empire Butter.*
(First Survey, April-June.)

	Independent.	Multiple.	All Shops.
<i>Only Empire Butter</i>	15	9	12
<i>More Empire than other Butters</i> ..	12	14	13
<i>Less Empire than other Butters</i> ..	15	34	25
<i>No Empire Butter</i>	58	43	50

The relatively low percentage of multiple shops selling only Empire butter is due to the tendency of these shops to stock a variety of types. It appears that Empire butters by themselves are not regarded as providing a sufficient variety; Australian and New Zealand butters are generally considered by retailers as of similar type and are seldom stocked simultaneously in the same shop, while neither is in season at the same time as Irish. Home farm butter is a distinct Empire type, but in view of the small quantities available it is rarely stocked by the larger multiple firms.

On the whole, Empire butter appeared to be particularly popular with the large provision firms ; it was stocked in nearly three-quarters of the branches of non-local multiple organisations and in the five department stores included in the enquiry.

In the Second Survey the decrease in the sales of Australian and New Zealand butter was partly offset by the increase in Irish, and on the whole the relative position of Empire butter appeared to be only slightly lower than in the First Survey. In Birmingham, there was a sharp decrease in Australian sales with little corresponding increase in Irish, but in Liverpool on the other hand the popularity of Irish in the summer more than counterbalanced the decrease in other Empire types.

The prevailing opinion amongst those retailers with experience of Empire butter was that its popularity had increased within the last two years, particularly in London, Liverpool and Birmingham.

V.—RETAIL PRICES.

As indicated in a previous section, it was not possible in all cases to distinguish between the various grades of butters and between salted and unsalted varieties. For the purposes of this report, therefore, butter from any one country is considered as one type. Many of the main types of bulk butter sold in this country are of one variety or grade ; in those cases where more than one variety or grade is sold, this would account for some part of the range in the retail prices recorded for these types.

An attempt was made to trace the retail price movement over the period of the enquiry and a weekly record was kept of the prices noted. As these prices were from different shops and different towns each week, they are not strictly comparable, but on the whole the areas are sufficiently varied for the monthly averages shown in Figure IV to be fairly representative.

The enquiry extended over a period of six months (April–September, 1929) ; during that time the average retail prices of most butters rose about 1*d.* per pound. Wholesale prices of butter in 1929 were falling during the early part of the year. In April when the enquiry started, they had begun to rise ; from July to August there was a

slight fall, then a rise to a peak in October a few weeks after the end of the enquiry, followed by a steady decline. Retail prices appeared to follow the general trend, with only a very short time lag.

Over the period of the enquiry, retail prices ranged from 1s. 4d. to 2s. 6d. per lb. The majority of prices were nearer the bottom than the top of this range. Very few instances of shops selling at prices involving an odd halfpenny per lb. were found. In Table 19 the shops selling at these prices have been classified as selling at the nearest penny above the actual price. In most cases this was the price that was in fact effective, since the majority of sales were in half and quarter pounds. It is probably the desire to avoid odd farthings in small sales which accounts for the evenness of the prices.

In the larger towns the First Survey lasted about six weeks, and during this time a price change of a penny probably occurred in most shops. The duration of the Second Survey was shorter, but took place during a period when butter prices were rising comparatively fast.

Apart from seasonal changes, prices varied according to kind of butter, area and type of shop. It was on the whole unusual to find a shop selling butter from one country at more than one price, but occasionally two qualities were being retailed at prices differing by 1d. per lb. In the following tables, therefore, the number of prices recorded for one type is sometimes greater than the number of shops recorded as stocking that type.

The extreme range of prices of any one bulk butter in one town was generally about 3d. or 4d., but the majority of prices seldom differed by more than 1d. and the Co-operatives and large multiples nearly always sold at a uniform price throughout the town. The price of Irish butter varied more than any other. In London the range of prices was much wider than in the other areas.

As would be expected, the high-class shops tended to stock the more expensive butters and to sell all butters at a price slightly above the average; the shops classified as "low" tended on the whole to stock the cheaper types, but it was noted that the average prices of each type were rather above those ruling in the middle-class shops. The difference was never great, but except in the case of Irish butter it persisted throughout all areas.

TABLE 19.—Number of Shops selling at the following Prices. All Areas (2,918 Shops)—First and Second Surveys.

Butter.	Farm.		Australian.		New Zealand.		Irish.		Danish.		Other European.		Argentine.		Bulk Blended.		Packeted.	
	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.
2/6 ..	1	1	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
2/5 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	1 1
2/4 ..	5	5	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	10 11
2/3 ..	4	4	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	2 4
2/2 ..	18	16	—	—	—	—	—	—	5	13	—	—	—	—	—	—	—	28 37
2/1 ..	4	11	—	—	—	—	—	—	—	1	—	—	—	—	—	3	—	24 102
2/0 ..	24	13	—	—	11	10	4	6	31	91	7	27	1	—	15	16	—	335 402
1/11 ..	9	6	1	1	7	53	5	17	73	172	9	8	—	—	9	15	—	284 257
1/10 ..	13	10	19	7	107	136	24	71	246	380	26	35	3	1	24	32	—	184 109
1/9 ..	5	3	17	20	157	455	48	311	420	925	26	63	4	12	33	98	—	68 87
1/8 ..	5	2	97	34	594	158	221	227	946	177	97	55	79	84	167	95	—	107 41
1/7 ..	2	2	89	22	170	12	57	69	36	6	60	150	13	16	18	8	—	26 8
1/6 ..	1	—	77	1	13	—	40	6	2	1	80	1	14	1	9	1	—	5 1
1/5 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1/4 ..	—	—	—	—	—	—	—	1	—	—	—	—	—	—	—	—	—	1 1
Average	1/11·9	2/0·4	1/7·4	1/8·2	1/8·2	1/9·1	1/8·0	1/8·6	1/8·7	1/9·5	1/7·7	1/8·3	1/7·8	1/8·0	1/8·5	1/9·0	1/10·8	1/11·3

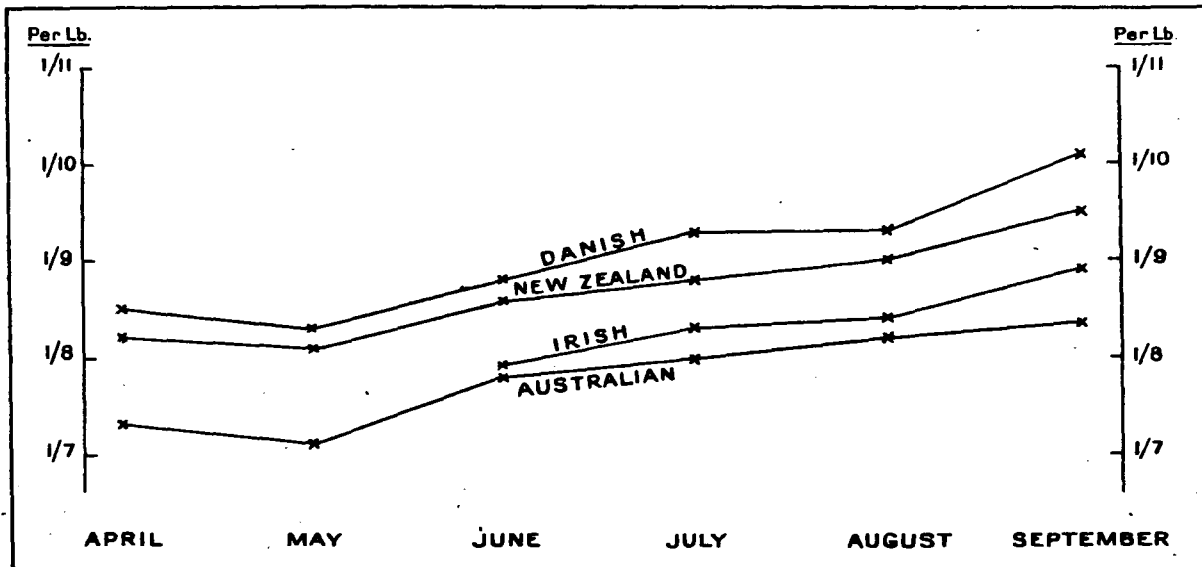
Individual Types.

Home farm was the most expensive butter on the retail market and packeted butters were generally dearer than bulk. Of the principal bulk butters, the order of retail price throughout the country with few exceptions was Danish, New Zealand, Irish, Australian. It is interesting to note that with the exception of Irish butter the same order applied to the number of shops stocking each type, and to the volume of imports during the period of the enquiry. Danish, besides being the dearest, was the most frequently stocked, and its imports were largest; New Zealand was second and Australian third in order of price, frequency, and volume of imports. This relationship does not appear to apply to Irish butter. In the earlier months it was the lowest of the principal butters in order of frequency and volume of imports; later it ranked second to Danish in these respects, but throughout the enquiry its price was slightly lower than that of New Zealand.

An interesting relationship can be observed between price differences and differences in the percentages of shops stocking the various butters throughout the areas. In the North, Danish was considerably dearer than New Zealand, and was stocked in many more shops; in Birmingham and Liverpool, it was slightly dearer, and was stocked in a few more shops; in London, Bristol and South Wales, it was slightly cheaper, and was stocked in fewer shops than New Zealand. The same relationship applies to the difference between Australian and Danish, and in the case of New Zealand and Australian it is remarkably close.

In Manchester, Yorkshire and Scotland, the average price of Danish butter was 1*d.* higher than that of New Zealand; in Birmingham it was $\frac{1}{2}$ *d.* higher, and in Liverpool slightly less; in London, Bristol and South Wales it was about $\frac{1}{3}$ *d.* lower. The average price of Australian butter was about 1 $\frac{1}{2}$ *d.* lower than that of Danish in all areas except London, and Bristol and South Wales, where it was about $\frac{2}{3}$ *d.* lower.

Farm Butter.—It has been noted that home farm butter was very rarely encountered during the enquiry, but it was found in a few shops in all areas except Manchester. The price varied widely, but in most cases it was the dearest butter on sale. In the First Survey the most usual price was 2*s.* per lb. and in the Second 2*s.* 2*d.*, but it was also sold as a medium-priced and in some cases as a low-priced butter.



MONTHLY AVERAGE RETAIL PRICES (ALL AREAS) 1929.

Fig. 4.

Australian Butter.—Australian butter was generally sold as a second or third line at 1*d.* or 2*d.* less than the first line. Nine-tenths of the prices recorded were from 1*s.* 6*d.* to 1*s.* 8*d.* in the First Survey, and 1*s.* 7*d.* to 1*s.* 9*d.* in the Second ; 1*s.* 8*d.* was the most usual price in both periods.

New Zealand Butter.—Where New Zealand butter was found in the North, it was generally stocked with Danish, and was sold either at the same price or 1*d.* less. In London it was often found with Argentine, the latter 1*d.* cheaper ; and in Bristol and South Wales with Irish, generally at the same price. One large national multiple firm stocked New Zealand and Ukrainian butter, the latter about 2*d.* per pound cheaper.

The prices recorded for New Zealand butter ranged from 1*s.* 6*d.* to 2*s.* 0*d.* Nine-tenths of those in the First Survey were from 1*s.* 7*d.* to 1*s.* 10*d.*, the most usual price being 1*s.* 8*d.* ; in the Second Survey nine-tenths were from 1*s.* 8*d.* to 1*s.* 10*d.*, with 1*s.* 9*d.* as the most frequent price.

Irish Butter.—Irish butter was not found in many shops until June. In Liverpool and Glasgow, it was generally stocked with Danish and sold at 1*d.* less, the most usual price being 1*s.* 8*d.* in August and September ; in about 10 per cent. of the shops in both towns, however, it was the only butter stocked and was sold at 1*s.* 9*d.* In Bristol, Irish and New Zealand butters were nearly always stocked together usually at the same price, but in some cases New Zealand was dearer. In South Wales, Irish was frequently the sole butter and in several cases two or three kinds of Irish were being stocked at different prices ; the most usual price was 1*s.* 8*d.* in June and 1*s.* 9*d.* in September, but the range in these towns was much wider than in Liverpool and Glasgow.

Irish butter was also found in Birmingham in August, where it was generally stocked with Danish, the Irish usually at 1*s.* 9*d.* and the Danish at 1*s.* 10*d.*

Danish Butter.—In the shops where Danish butter was sold, it was almost without exception the dearest or the only bulk type stocked. The price difference between Danish and other bulk butters was definitely greatest in the Northern and Eastern areas where it was well established on the market. In London, Bristol and South Wales, on the other hand, the average price in June was slightly below that of New Zealand, but it was very rarely sold at a lower price in the same shop.

Other Foreign Butters.—Finnish and Swedish butters were sold as similar types to Danish and were found in the areas where Danish was most prevalent. Siberian butter was stocked in a few shops as a second or third line ; the average price in the First Survey was 1s. 6½*d.* and in the second 1s. 7½*d.* It was the cheapest butter on the market with the exception of Ukrainian which was sold by one large multiple firm at 1s. 6*d.* in the earlier months and 1s. 7*d.* later. Argentine butter was found in London and Birmingham, but in other towns it was rare ; the most usual price was 1s. 8*d.* in both Surveys.

Packeted Butter.—The most usual price for packeted butters was 2s. per pound over the whole period. The average price was about 1s. 11*d.* and nine-tenths of the prices recorded were from 1s. 8*d.* to 2s. in the First Survey, and 1s. 9*d.* to 2s. 1*d.* in the Second. Non-local multiple shops and co-operative stores usually sold their own packeted butters at a price considerably below the average.

VI.—INDIVIDUAL AREAS.

London.

In the London area 546 shops were visited ; 248 of these were Independents and 298 Multiples. The First Survey took place from April 4th to July 6th, and the second from August 5th to October 5th.

TABLE 20.—*Percentage of Independent and Multiple Shops in London stocking the various Types of Butter.*

	First Survey.			Second Survey.		
	Inde- pendent.	Mul- tiple.	All Shops.	Inde- pendent.	Mul- tiple.	All Shops.
Packeted	61	46	53	61	45	52
New Zealand	39	58	49	30	50	41
Bulk-Blended	21	34	28	20	34	28
Australian	25	10	16	12	3	7
Argentine	11	19	15	12	19	16
Danish	2	20	12	3	20	12
Farm	8	4	6	6	3	4
Irish	4	2	3	26	17	21
Other Butters	10	3	6	7	4	5

Packeted butter was stocked in a larger number of shops than any other type. In about half the shops where it was stocked, it was the only type sold, but these were mostly small independent grocers and dairies. Where a bulk and a packeted butter were stocked together, the sales of the bulk butter were almost always stated to be the greater.

In both Surveys, New Zealand butter was the predominant bulk type on the London market, particularly in the Non-Local Multiples where it was stocked in 90 per cent. of the shops. It was nearly always stocked in conjunction with another type, usually bulk-blended or packeted, and about 40 per cent. of the retailers stocking it stated that the sales at the time of the First Survey were greater than those of their other types. In the Second Survey, though the number of shops stocking New Zealand did not diminish greatly, its position as the chief type was in many cases taken by Irish or bulk-blended.

Bulk-blended butter appeared to be more popular in London than in any other area, and though few retailers were stocking it as their only butter, it was often the chief type from the point of view of quantities sold. About half the shops stocking it were Non-Local Multiples and the rest mostly Independents.

Australian butter was found chiefly in the independent shops. In the Second Survey its place was taken mainly by Irish butter.

Danish butter was found in 12 per cent. of the shops, most of which were Non-Local Multiples; it was usually stated to be the chief type sold, with New Zealand as the second line.

Other butters stocked during the First Survey were:—Dutch (15 shops); French (seven shops); Siberian (six shops); Swedish (two shops); and Canadian, Latvian and Ukrainian (one shop each). In the Second Survey Dutch butter was stocked by eight shops; French (two shops); Siberian (13 shops); Swedish (five shops); and Polish (one shop).

Prices.—In London, as in other areas, the dearest types of bulk butter were those whose sales were greatest; these were New Zealand and bulk-blended. Irish had a remarkably high average price, but in the First Survey there were too few price records and the dispersion was too great for the average to be significant. Danish was among the higher priced butters even though its sales were comparatively small, but its price relative to other types was lower in London than in any of the other areas.

TABLE 21.—*Number of Shops selling at the following Prices. London (546 shops)—First and Second Surveys.*

Butter.	Farm.		Australian.		New Zealand.		Irish.		Danish.		Argentine.		Others.		Bulk-Blended.		Packeted.	
	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.
2/4 ..	3	2	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
2/3 ..	3	4	—	—	—	—	—	—	—	—	—	—	—	—	—	—	3	2
2/2 ..	9	6	—	—	—	—	—	—	—	—	—	—	—	—	—	—	10	7
2/1 ..	3	3	—	—	—	—	—	—	—	1	—	—	—	—	—	2	10	30
2/0 ..	11	4	—	—	11	9	2	4	1	—	1	—	6	7	10	11	146	174
1/11 ..	6	—	1	1	5	21	—	8	—	3	—	—	—	—	8	12	27	55
1/10 ..	2	2	12	7	76	81	7	35	12	12	3	1	1	1	20	27	87	69
1/9 ..	1	1	14	14	62	123	5	72	32	42	4	12	—	—	28	45	42	44
1/8 ..	—	—	56	16	135	2	2	9	37	2	54	60	20	17	87	63	63	33
1/7 ..	—	—	11	—	4	—	2	1	—	—	12	10	1	5	2	1	23	7
1/6 ..	—	—	5	—	5	—	—	—	—	—	10	1	6	6	2	—	4	—
Average	2/0·8	2/1·3	1/8·2	1/8·8	1/8·9	1/9·6	1/9·4	1/9·4	1/8·7	1/9·3	1/7·8	1/8·0	1/8·4	1/8·4	1/8·8	1/9·2	1/10·4	1/10·9

In April and May, 1929, 1s. 8d. was the most usual price for all the main bulk butters ; during June, New Zealand and Danish rose to 1s. 9d., but Australian and Bulk-Blended were most frequently sold at 1s. 8d. over the whole period. Irish was generally 1s. 9d. when it came into season.

The range of prices for packeted butters was wide in all types of shop, but dairies appeared on the whole to stock lower priced brands than grocers.

Bristol and South Wales.

In the Bristol and South Wales area, 399 shops were visited ; 150 in Bristol, 100 in Cardiff, 46 in Newport, and 103 in Swansea. In Bristol, 79 were Independents and 71 Multiples ; in the South Wales towns, 107 were Independents and 142 Multiples. The First Survey took place between June 4th and 29th, and very little change was observed at the time of the Second Survey in September. The figures in the table are taken from the First Survey.

TABLE 22.—*Percentage of Independent and Multiple Shops stocking the various Types of Butter.*

(Bristol and South Wales area, First Survey.)

	Bristol.			Cardiff, Newport and Swansea.		
	Inde- pendent.	Mul- tiple.	All Shops.	Inde- pendent.	Mul- tiple.	All Shops.
New Zealand	81	93	87	21	44	34
Irish	35	21	29	80	54	66
Packeted	35	21	29	17	8	12
Danish	3	21	11	4	25	16
Australian	9	7	8	5	10	8
Siberian	3	11	7	—	3	2
Bulk-Blended	1	11	6	22	20	21
Farm	5	1	3	6	1	3
Ukrainian	—	7	3	—	7	4
Argentine	—	—	—	—	2	1

In Bristol, New Zealand butter was the type most commonly stocked. Nearly 25 per cent. of the shops visited were stocking only New Zealand, and in addition over 50 per cent. were selling it as the chief line. Irish butter was stocked mainly as a second line in independent and local multiple shops.

In Cardiff, Newport, and Swansea, Irish was the predominant butter in all types of shop except Non-Local Multiples; it was the only butter stocked in 25 per cent. of the shops visited, and the chief line in a further 25 per cent. New Zealand was most frequently found in the Non-Local Multiples where it was generally sold as the chief line; in the other types of shop, it was usually stocked as a second line to Irish.

Packeted butters were found in a larger proportion of shops in Bristol than in the South Wales towns. Most of the shops stocking these butters were Independents.

Danish was confined almost entirely to the Non-Local Multiples in both Bristol and South Wales. About half these shops were selling it as a chief line.

Bulk-blended was stocked by about 40 per cent. of the shops visited in Swansea; these were mostly Independents and Co-operatives. In the other towns of the area, the proportions were much smaller.

Prices.—In the First Survey (June, 1929), the most usual price for all the principal bulk butters was 1s. 8d.; in the Second Survey (September), Irish and New Zealand were generally sold at 1s. 9d. and Danish at 1s. 10d. The range of prices was greater for Irish than for other butters. New Zealand and Irish butters were on an average slightly dearer in Bristol than in South Wales.

The eight shops which sold packeted butter at 1s. 8d. in the First Survey were all branches of a multiple firm in Swansea selling its own brand.

The prices of the majority of butters rose by a penny per pound during July and August.

TABLE 23.—*Number of Shops selling at the following Prices. Bristol and South Wales (399 shops)—
First and Second Surveys.*

Butter.	Farm.		Australian.		New Zealand.		Irish.		Danish.		Siberian.		Ukrainian.		Argentine.		Bulk-Blended.		Packeted.		
	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	
2/3 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	2
2/2 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	3
2/1 ..	—	4	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	30
2/0 ..	4	1	—	—	—	1	—	—	1	—	—	—	—	—	—	—	—	—	—	—	21
1/11	1	3	—	—	1	20	1	8	—	18	—	—	—	—	—	—	—	—	—	—	17
1/10	3	4	1	—	20	47	8	25	3	29	—	—	—	—	—	—	—	—	—	—	1
1/9 ..	3	2	1	2	49	127	28	169	7	5	—	—	—	—	—	—	—	—	—	—	8
1/8 ..	3	—	15	2	147	—	161	20	42	3	—	1	—	—	—	—	—	—	—	—	—
1/7 ..	—	—	7	3	3	—	18	34	5	—	1	13	—	22	—	—	—	—	—	—	—
1/6 ..	—	—	7	—	—	—	30	3	—	—	13	—	15	—	3	—	—	—	—	—	—
Average	1/10.0	1/11.1	1/7.4	1/7.9	1/8.4	1/9.5	1/7.9	1/8.8	1/8.1	1/10.1	1/6.1	1/7.1	1/6.0	1/7.0	1/6.0	—	1/8.1	1/9.0	1/11.1	2/0.0	

Birmingham.

In the Birmingham area, 333 shops were visited ; 127 Independents and 206 Multiples. The First Survey took place from April 4th to the end of May, and the Second from the end of July to September 14th.

TABLE 24.—Percentage of Independent and Multiple Shops in Birmingham stocking the various Types of Butter.

	First Survey.			Second Survey.		
	Independent.	Multiple.	All Shops.	Independent.	Multiple.	All Shops.
Danish	80	85	83	80	85	83
New Zealand	53	71	64	53	71	64
Packeted	56	40	46	56	40	46
Australian	27	31	29	6	2	4
Siberian	2	18	12	2	19	12
Bulk-Blended	1	12	8	1	5	3
Argentine	1	11	7	1	11	7
Irish	9	1	5	18	9	13
Swedish	4	1	2	4	1	2
Farm	4	—	2	4	—	2
Other Butters	1	1	1	1	11	7

One of the outstanding features of the retail butter trade in Birmingham was that nearly every shop was stocking two or more types. Danish was the staple butter in all shops except dairies, but 95 per cent. of the shops stocking Danish were stocking other butters as well, though the Danish sales were nearly always stated to be the largest.

New Zealand butter was stocked by a larger percentage of shops than in any other area, but in 83 per cent. of the shops stocking it, it was sold as a second line to Danish.

Packeted butters were stocked chiefly by Independents and Co-operatives where their sales were generally stated to be small, though 10 per cent. of the independent shops were stocking only packeted butters.

TABLE 25.—*Number of Shops selling at the following Prices. Birmingham (333 shops)—
First and Second Surveys.*

Butter.	Farm.		Australian.		New Zealand.		Irish.		Danish.		Siberian.		Swedish.		Argentine.		Others.		Bulk-Blended.		Packeted.	
	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.
2/2..	1	1	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	2
2/1..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	5
2/0..	1	1	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	15	51
1/11	—	3	—	—	—	—	—	—	—	1	—	—	—	—	—	—	—	—	—	—	79	60
1/10	3	—	1	—	—	3	—	—	4	32	—	—	—	—	—	—	—	—	—	—	26	8
1/9..	—	—	—	1	5	130	—	11	47	203	1	1	—	1	—	—	—	1	—	8	1	25
1/8..	—	—	16	7	146	74	11	30	222	42	—	9	4	5	22	24	1	1	22	1	30	5
1/7..	—	—	43	4	63	7	3	1	4	—	14	31	3	2	—	—	1	21	—	3	3	—
1/6..	—	—	38	—	—	—	1	—	2	—	25	—	1	—	1	—	1	—	5	—	—	—
Average	1/11·2	1/11·8	1/6·8	1/7·8	1/7·7	1/8·6	1/7·7	1/8·2	1/8·2	1/9·0	1/6·4	1/7·3	1/7·4	1/7·9	1/7·9	1/8·0	1/7·0	1/7·1	1/7·6	1/8·4	1/10·3	1/11·0

Australian butter was stocked by about one-third of the shops in the First Survey, chiefly by Non-Local Multiples, nearly half of which were stocking it. Like New Zealand, it was generally sold as a second line. In the Second Survey, very few shops were stocking Australian.

Other butters found in Birmingham were Finnish (two shops in both Surveys); and Ukrainian (one shop in the First Survey and 21 in the Second).

Prices.—During the earlier months of the enquiry, New Zealand butter was usually sold at 1s. 7d. or 1s. 8d., and Danish butter nearly always at 1s. 8d. Most of the shops which sold a brand of packeted butter at 1s. 10d. were Non-Local Multiples, and those at 1s. 8d. Co-operative Stores. In the later months the prices of nearly all butters rose by 1d. per lb.

Liverpool.

In the Liverpool area, 211 shops were visited; 86 of these were Independents and 125 Multiples. The First Survey took place from the beginning of April to May 16th, and the Second from July 10th to August 24th.

TABLE 26.—*Percentage of Independent and Multiple Shops in Liverpool stocking the various Types of Butter.*

	First Survey.			Second Survey.		
	Inde- pendent.	Mul- tiple.	All Shops.	Inde- pendent.	Mul- tiple.	All Shops.
Danish	69	58	63	66	58	62
New Zealand	50	56	54	2	17	11
Packeted	19	27	24	15	30	24
Irish	22	2	10	76	43	56
Australian	3	9	7	1	2	1
Swedish	10	3	6	5	1	2
Bulk-Blended	—	7	4	—	8	5
Farm	2	—	1	2	—	1
Other Butters	2	2	2	2	6	4

Danish and New Zealand were the chief types in Liverpool in the First Survey, and Danish and Irish in the Second. Danish and New Zealand were stocked in all types of shop except dairies, Danish chiefly

TABLE 27.—Number of Shops selling at the following Prices. Liverpool (211 shops)—First and Second Surveys.

Butter.	Farm.		Australian.		New Zealand.		Irish.		Danish.		Swedish.		Others.		Bulk-Blended.		Packeted.	
	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.
2/2 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	1	1
2/1 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	1	3
2/0 ..	2	1	—	—	—	—	—	—	—	—	—	—	—	—	—	—	36	32
1/11 ..	—	—	—	—	1	—	—	—	—	2	—	—	—	—	—	—	4	5
1/10 ..	—	—	—	—	1	—	—	1	4	28	1	—	1	—	—	—	6	8
1/9 ..	—	—	—	1	12	4	1	31	34	93	3	1	1	2	—	—	2	1
1/8 ..	—	—	4	—	79	18	15	89	90	8	10	4	—	—	9	9	—	1
1/7 ..	—	1	5	1	19	1	5	6	4	—	—	—	3	7	—	—	—	—
1/6 ..	—	—	5	1	1	—	—	1	—	—	—	—	—	—	1	—	—	—
Average.	2/0	1/9-5	1/6-9	1/7-3	1/8-0	1/8-1	1/7-8	1/8-2	1/8-3	1/9-2	1/8-4	1/8-2	1/8-0	1/7-4	1/8-0	1/7-8	1/11-6	1/11-5

as the first line and New Zealand as the second line. Irish was found most frequently in the independent and local-multiple shops ; 60 per cent. of the shops stocking it in the Second Survey were selling it as their chief line.

Nearly all the shops stocking packeted butters were Independents or dairies. Two-thirds of these shops were selling no bulk butter, but their sales of packeted were generally stated to be small.

Australian butter was found in the First Survey in a few shops, mostly of the non-local multiple type, but it was always sold as a second line and was almost entirely replaced by Irish in the Second Survey.

Other butters found in Liverpool were Ukrainian (two shops in the First Survey and three in the Second) ; Argentine (one shop in the First Survey and three in the Second) ; Finnish (two shops in both Surveys) ; and Siberian (one shop in the Second Survey).

Prices.—In the majority of cases, Danish butter was sold at 1s. 8d. in the First Survey, and 1s. 9d. in the Second ; Irish at 1s. 8d. in the Second Survey and New Zealand at 1s. 8d. in both Surveys.

Irish butter was generally sold at 1s. 8d. when stocked with Danish, but where it was the only line it was more often 1s. 9d.

Manchester.

In the Manchester area 573 shops were visited ; 397 in Manchester and the remainder in Blackburn, Bolton and Wigan. Of these, 242 were Independents and 331 Multiples. The First Survey took place from the beginning of April to June 18th, and the Second Survey from the beginning of July to the end of August.

Danish was the predominant butter in all types of shop except dairies ; 40 per cent. of the shops visited were stocking no other type, and a further 40 per cent. were selling it as their chief line.

The percentage of shops stocking Danish butter was much the same in Manchester, Blackburn, Bolton and Wigan, but a much larger proportion in Manchester were stocking other types as well. Thus, in Manchester, 32 per cent. of the shops stocked New Zealand butter in the First Survey, as compared with 7 per cent. in the other three towns ; in the Second Survey 14 per cent. in Manchester were stocking Irish, and only about 2 per cent. in the other towns ; in both Surveys about 30 per cent. in Manchester were stocking packeted butters and 10 per cent. in the other towns.

TABLE 28.—*Number of Shops selling at the following Prices. Manchester (573 shops)—
First and Second Surveys.*

<i>Bullcr.</i>	Australian.		New Zealand.		Irish.		Danish.		Finnish.		Siberian.		Swedish.		Others.		Bulk-Blended.		Packeted.		
	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	
2/2 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	1	1
2/1 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	3	9
2/0 ..	—	—	—	—	—	—	3	56	—	1	—	—	—	—	—	—	—	—	9	23	
1/11	—	—	—	12	—	—	29	11	1	2	—	—	1	2	—	—	—	—	91	89	
1/10	4	—	7	1	1	—	37	69	—	5	—	1	—	2	—	—	—	—	28	4	
1/9 ..	1	1	7	28	—	11	69	329	5	45	—	—	2	2	—	—	—	1	1	—	
1/8 ..	5	6	40	38	1	45	329	5	40	6	2	—	5	2	—	—	3	7	1	—	
1/7 ..	19	12	77	3	12	1	16	5	20	—	3	21	3	5	—	8	7	—	—	1	
1/6 ..	18	—	7	—	2	1	—	1	3	—	—	1	—	—	4	—	—	—	1	1	
Average	1/7-0	1/7-4	1/7-5	1/8-8	1/7-1	1/8-1	1/8-5	1/9-5	1/7-7	1/9-1	1/7-4	1/7-1	1/8-2	1/8-5	1/6-0	1/7-0	1/7-3	1/8-1	1/10-9	1/11-2	

On the other hand, Finnish butter, which, like Danish, was most frequently stocked as the only type or the main type, was stocked by 10 per cent. of the shops in Manchester, and by 15 per cent. in Blackburn, Bolton and Wigan.

TABLE 29.—Percentage of Independent and Multiple Shops in the Manchester Area stocking the various Types of Butter.

	First Survey.			Second Survey.		
	Independent.	Multiple.	All Shops.	Independent.	Multiple.	All Shops.
Danish	79	83	84	78	87	83
New Zealand	6	37	24	2	23	14
Packeted	19	26	23	19	24	22
Finnish	18	7	12	17	5	10
Australian.. .. .	1	14	8	1	5	3
Irish	2	3	3	5	13	10
Swedish	2	2	2	2	2	2
Bulk-Blended	—	3	2	—	2	1
Siberian	—	2	1	—	7	4
Other Butters	—	1	1	—	2	1

New Zealand butter was found chiefly in Non-Local and Local Multiples in both Surveys ; in the Second Survey it had been replaced to some extent, particularly in the local multiple shops, by Irish.

Other butters observed in the Manchester area were Ukrainian (three shops in the First Survey and seven in the Second) ; and Dutch (one shop in both Surveys).

Prices.—In the majority of shops in the area, Danish butter was 1s. 8d. per lb. in May, and 1s. 9d. during June and July.

New Zealand butter was generally sold at 1s. 7d. or 1s. 8d. per lb. in the First Survey, and at 1s. 8d. or 1s. 9d. in the Second.

Yorkshire.

In the Yorkshire area 441 shops were visited ; 99 in Bradford, 228 in Leeds, and 114 in Sheffield. Of the total, 239 were Independents and 202 Multiples. The First Survey took place from May 22nd to July 12th, and the Second from August 3rd to September 7th.

TABLE 30.—*Percentage of Independent and Multiple Shops in the Yorkshire Area stocking the various Types of Butter.*

	First Survey.			Second Survey.		
	Independent.	Multiple.	All Shops.	Independent.	Multiple.	All Shops.
Danish	88	70	80	88	71	80
Packeted	27	23	25	26	23	24
New Zealand	1	17	8	1	18	9
Finnish	3	12	7	2	11	6
Swedish	3	3	3	4	3	4
Australian.. .. .	—	4	2	—	2	1
Farm	2	2	2	1	2	2
Ukrainian	—	4	2	—	4	2
Irish	2	2	2	1	2	2
Other Butters	—	3	2	—	5	3

Danish was the predominant butter in all types of shop except dairies ; 70 per cent. of the shops stocking Danish were stocking no other butter, and where another type was stocked it was nearly always sold in relatively small quantities.

Packeted butters were stocked in independent and local multiple shops chiefly as a second line to Danish ; in dairies packeted butter was usually the only type stocked.

New Zealand was stocked chiefly by Non-Local Multiples. Usually it was sold as a second line to Danish, but in the branches of one multiple firm it was the chief line with Ukrainian as the second line.

Finnish and Swedish were found mainly in independent and local multiple shops ; they were usually sold as the chief lines and were generally regarded as similar types to Danish.

A few Non-Local Multiples were stocking Australian.

Other butters found in the Yorkshire area were Siberian (three shops in the First Survey, five in the Second) ; Bulk-blended (three shops in the First Survey and two in the Second) ; Dutch (two shops in both Surveys) and Argentine (three shops in the Second Survey).

TABLE 31.—*Number of Shops selling at the following Prices. Yorkshire (441 shops)—
First and Second Surveys.*

Butter.	Farm.		Australian.		New Zealand.		Irish.		Danish.		Finnish.		Swedish.		Ukrainian.		Others.		Packeted.			
	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.		
2/2 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	1	3
2/1 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	2	19
2/0 ..	1	5	—	—	—	—	1	—	13	26	—	17	—	—	—	—	—	—	—	—	41	50
1/11	2	—	—	—	—	—	—	—	21	82	6	1	1	2	—	—	—	—	—	—	43	25
1/10	4	3	1	—	—	1	2	3	88	113	12	5	1	7	—	—	—	2	—	—	13	7
1/9 ..	1	—	1	1	15	35	1	2	129	125	4	4	4	2	—	—	3	—	—	—	7	8
1/8 ..	—	—	—	3	19	2	2	1	102	9	6	—	2	4	—	—	2	2	—	—	4	1
1/7 ..	—	—	4	2	3	1	—	1	1	—	2	—	5	1	1	8	—	8	—	—	—	—
1/6 ..	1	—	4	—	—	—	2	—	—	—	—	—	—	—	8	—	3	—	—	—	—	—
Average	1/9-9	1/11-3	1/7-1	1/7-8	1/8-3	1/8-9	1/8-6	1/9-0	1/9-2	1/10-0	1/9-5	1/11-1	1/8-3	1/9-3	1/6-1	1/7-0	1/7-6	1/7-7	1/11-1	1/11-6		

Prices.—For Danish butter 1s. 8d., 1s. 9d. and 1s. 10d. were usual in the earlier part of the enquiry ; later, most prices were from 1s. 9d. to 1s. 11d. New Zealand butter was retailed at 1s. 8d. in May and rose to 1s. 9d. towards the end of June.

Finnish butter was chiefly sold in Leeds, at 1s. 10d. or 1s. 11d. in June and July, and at 2s. in September.

Scotland.

In the Scotland area, 415 shops were visited ; 150 in Edinburgh and 265 in Glasgow. About half were Independents and half Multiples in each case. The First Survey took place from June 24th to July 12th when the Irish season was well advanced and very little change was observed at the time of the Second Survey in September. The figures in the table are taken from the First Survey.

TABLE 32.—*Percentage of Independent and Multiple Shops in Edinburgh and Glasgow stocking the main Types of Butter.*

	Edinburgh.			Glasgow.		
	Independent.	Multiple.	All Shops.	Independent.	Multiple.	All Shops.
Danish	93	68	81	76	82	80
Packeted	72	50	61	7	9	8
New Zealand	5	21	13	6	8	7
Irish	—	7	3	29	20	25
Farm	—	3	1	11	2	6
Swedish	—	1	1	3	5	4
Bulk-Blended	—	1	1	—	4	2
Finnish	—	—	—	5	3	4
Other Butters	—	1	1	1	3	2

Danish was the predominant butter observed in the area. In over 40 per cent. of the shops in both Surveys it was the only butter stocked, and in practically all cases where other types were stocked in addition, Danish sales were stated to be considerably the largest. It was the staple butter in all types of shop except dairies, and even amongst these nearly half were stocking it.

TABLE 33.—*Number of Shops selling at the following Prices. Scotland (415 shops)—First and Second Surveys.*

<i>Butter.</i>	<i>Farm.</i>		<i>New Zealand.</i>		<i>Irish.</i>		<i>Danish.</i>		<i>Finnish.</i>		<i>Swedish.</i>		<i>Others.</i>		<i>Bulk-Blended.</i>		<i>Packeted.</i>	
	<i>1st.</i>	<i>2nd.</i>	<i>1st.</i>	<i>2nd.</i>	<i>1st.</i>	<i>2nd.</i>	<i>1st.</i>	<i>2nd.</i>	<i>1st.</i>	<i>2nd.</i>	<i>1st.</i>	<i>2nd.</i>	<i>1st.</i>	<i>2nd.</i>	<i>1st.</i>	<i>2nd.</i>	<i>1st.</i>	<i>2nd.</i>
2/6 ..	1	1	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
2/5 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	1	1
2/4 ..	2	3	—	—	—	—	—	—	—	—	—	—	—	—	—	—	10	11
2/3 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
2/2 ..	8	9	—	—	—	—	5	13	—	—	—	—	—	—	—	—	13	20
2/1 ..	1	4	—	—	—	—	—	—	—	—	—	—	—	—	—	—	3	6
2/0 ..	5	1	—	—	1	1	14	9	—	—	1	2	—	—	4	4	57	51
1/11 ..	—	—	—	—	4	1	23	55	—	—	—	—	1	—	—	—	20	6
1/10 ..	1	1	3	3	6	7	98	97	7	5	2	6	1	1	—	—	13	12
1/9 ..	—	—	7	8	13	15	102	128	2	2	2	2	—	—	—	1	14	1
1/8 ..	2	2	28	24	29	34	124	108	1	2	6	4	4	—	2	4	1	1
1/7 ..	2	1	1	—	18	25	6	1	1	—	3	4	—	—	—	—	—	—
1/6 ..	—	—	—	—	4	—	—	—	—	—	1	—	—	—	—	—	—	—
1/5 ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1/4 ..	—	—	—	—	—	1	—	—	—	—	—	—	—	—	—	—	1	1
Average	2/0·5	2/1·1	1/8·3	1/8·4	1/8·2	1/8·1	1/9·2	1/9·5	1/9·4	1/9·3	1/8·3	1/9·0	1/8·4	1/10·5	1/10·7	1/9·9	1/11·8	2/0·5

Packeted butters were remarkably popular in Edinburgh, though they were usually stocked in conjunction with a bulk type and their sales were stated to be comparatively small. In Glasgow very few shops were stocking packeted butters.

New Zealand butter was stocked by a larger proportion of shops in Edinburgh than in Glasgow; in Edinburgh it was usually sold as a second line to Danish, but in Glasgow it was more often the only type stocked.

Irish butter, on the other hand, was more common in Glasgow than in Edinburgh. In Glasgow nearly 10 per cent. of the shops were selling Irish butter only.

Other butters found in Glasgow were Argentine (three shops); and Australian (one shop). In Edinburgh one shop was stocking Dutch butter.

Prices.—The prices of Danish butter in the Glasgow multiple shops showed an unusually wide range, all prices from 1s. 8d. to 1s. 11d. being fairly frequent. The Multiples in Edinburgh nearly all sold at 1s. 8d. or 1s. 9d. in June and July, but in August 1s. 11d. was a usual price. In the independent shops, the average was distinctly lower in Glasgow than in Edinburgh.

The prices of Irish butter in Glasgow were very varied. In the few shops where it was selling at 1s. 11d. or 2s. 0d., Danish was also stocked but at a lower price: where it was 1s. 10d., and in most of the shops where it was 1s. 9d., it was the only butter stocked.

Farm butter was the most expensive type in Glasgow, but in Edinburgh it was the cheapest.

VII.—SUMMARY.

1. The object of the enquiry was to examine the position of Empire butters in the retail shops of the main centres of population in the United Kingdom and to estimate the extent and nature of the competition from butters of foreign origin.

In view of the seasonal variation in supply, the enquiry was undertaken in two parts, the First Survey being carried out in the late spring, and the Second Survey during the summer months. In this way it has been possible to secure a double picture of retail market conditions; firstly, when supplies of New Zealand and Australian butters are relatively plentiful, and secondly, when the butter export season of the Irish Free State is at its height.

The information summarised in the report was obtained by personal interview in each period with nearly 3,000 retail traders in 18 towns, representative of all classes of trade and types of business.

2. In 1929, nearly 6½ million cwts. of butter were imported into the United Kingdom and, on the basis of the 1925 estimate, probably less than one million cwt. was produced at home. The chief sources of supply were Denmark 34 per cent. of the total import, other foreign countries 24 per cent., New Zealand 20 per cent., Australia 12 per cent. and the Irish Free State 9 per cent. In all, the imports from the oversea Empire together with the home production were approximately equal to the imports from foreign countries.

Most of the supply of butter from Australia and New Zealand arrives in this country during the winter and early spring; Irish supplies are at their maximum in the summer, and the European imports also increase during the summer months. These variations approximately balance, and the total imports are spread fairly evenly throughout the year.

3. The following table shows the percentage of shops stocking the various types of butter at the two periods:—

Type of Butter.	Percentage of Shops Stocking.	
	First Survey. (April-June.)	Second Survey. (July-September.)
Danish	58	59
New Zealand	35	28
Irish	12	22
Australian	10	3
Argentine	4	4
Finnish	4	3
Farm	3	2
Siberian	2	3
Swedish	2	2
Ukrainian	1	2
Others	1	1
Bulk-Blended	9	9
Packeted	32	31

Comparing the results of the two Surveys, the number of shops stocking Irish butter had almost doubled at the second period, the number stocking New Zealand had dropped to four-fifths of the previous total, and the number stocking Australian to one-third. The resultant drop in the total numbers stocking New Zealand and Australian butters was somewhat greater than the increase in the numbers stocking Irish. The figures for farm butter and for bulk-blended and packeted butters were almost unchanged. Of the areas, Liverpool showed the greatest change and Yorkshire the least.

4. Butter is imported into the United Kingdom through three main channels: Australian and New Zealand butters chiefly through London; Irish butter through the ports on the West coast; and European butters, mostly from Denmark, through the ports on the East coast.

The main markets for each type of butter tend to be grouped round the ports of entry.

New Zealand butter was most frequently stocked in the South and, in the earlier months of the year, in Liverpool. In Yorkshire and Scotland it was moderately frequent in Non-Local Multiples, but rare in other shops. Australian butter was most popular in London and Birmingham. Like New Zealand butter, it was rarely stocked in the North and East.

Irish butter, which was not available in quantity till June, found its main market in the West, though it was stocked by a fair number of shops in London. In South Wales, in the area served by Fishguard, it was by far the predominant type of butter in its season; in Liverpool it held a position comparable with Danish, and in Glasgow it was second to Danish. Many of the retailers who stocked Irish butter stated that they change over to New Zealand or Australian in the winter months.

Danish butter was the staple type in the North and East. In Liverpool and Birmingham it was about equal in popularity to Empire butters; in London, Bristol and South Wales it was much less commonly found.

Home Farm butter was mostly retailed in the country districts, and was seldom brought into the population centres in which the enquiry was conducted.

Other butters found during the Surveys were Argentine, chiefly in London and Birmingham; Siberian, chiefly in Birmingham and Bristol; Swedish and Finnish in the North; Ukrainian, stocked by one large multiple firm in all parts of the country; and Dutch and French in London.

Butter made up into packets and sold under a brand name was the staple type in dairies. It was also sold by about 30 per cent. of the grocers, but generally in relatively small quantities; in Non-Local Multiples it was rare. It was most popular in London and Edinburgh.

5. Farm and packeted butters were generally about 2s. per lb. and other butters ranged from about 1s. 6d. to 2s. 0d., the most usual prices being 1s. 8d. and 1s. 9d. The general order of price of the various types of butter was Home Farm, Packeted, Danish (Finnish and Swedish), New Zealand, Irish, Australian, Argentine, Siberian and Ukrainian. It is to be noted that these prices refer to 1929.

Evidence of local preference is shown by the relative prices of different butters. In the North and North-East, where Danish butter predominated, it was sold on an average at 1d. or 2d. more than any other type; in the South, where it was comparatively rare, it was about the same price as New Zealand and Irish, and in the West it was only slightly dearer on the average than these types.

6. In regard to the tendency towards localisation of markets, the policy of multiple organisations, particularly those of national scope, is of special interest. These firms generally stock butters from two or three different countries and tend to standardise stocks throughout the branches; smaller firms and independent shops, on the other hand, appear to confine themselves usually to the one or two types which are most popular in the locality. Thus, in the Yorkshire area and in Edinburgh, New Zealand butter was found in about 35 per cent. of the national multiple branch shops and in less than 5 per cent. of the other shops. In Bristol and South Wales, Danish butter was sold by 40 per cent. of the National Multiples and in London by 33 per cent., while the corresponding percentages for other shops in these two areas were five and four respectively.

APPENDIX.

NORTHERN IRELAND.*

1. Upon the occasion of the last Census of Production, the estimated supply of butter available for consumption in Northern Ireland was approximately 252,000 cwt., made up as follows :—

	56,000 cwt. made in creameries.
	124,000 „ made on farms.
	72,000 „ being excess of imports over exports.
Total ..	252,000

About 71 per cent. of the total butter supply was produced in Northern Ireland and 29 per cent. imported. The production of butter is, however, largely confined to the summer months and during this period there is a considerable surplus of butter available for export. During the winter months, on the other hand, Northern Ireland is largely dependent upon imported supplies. Accordingly, it was considered advisable in the case of the Retail Butter Survey of Belfast to adopt different periods from those adopted in Great Britain. The First Survey was conducted from June 12th to July 11th, 1929, when the Northern Ireland production was at its maximum; and the second from January 17th to February 21st, when Belfast was largely dependent upon imported supplies. In other respects the Survey in Belfast was conducted on parallel lines to that in Great Britain. Some of the results are summarised briefly in the following paragraphs.

2. It is estimated that there are probably over 500 shops engaged in selling butter in Belfast. Two hundred and twelve firms, representing 249 shops, were visited. The classification of shops according to organisation showed that 78 per cent. were independent, 18 per cent. local multiple, 2 per cent. non-local multiple and 2 per cent. dairies. As regards class of trade, about 10 per cent. of the shops may be classified as "high", 40 per cent. as "middle", and 50 per cent. as "low".

TABLE 1.—Percentage of Shops stocking One, Two, Three or more Types of Butter.

	First Survey.	Second Survey.
One Type	35	39
Two Types	43	33
Three Types	19	21
More than Three Types	3	7

* Summary of some of the results of an Enquiry into the Retail Marketing of Butter in Belfast undertaken by the Ministry of Agriculture for Northern Ireland.

The increase in the percentage of shops stocking three or more types of butter during the Second Survey appears to have been due to shops stocking imported butters in the winter to make up their supplies through the falling off in the quantity of local butter available.

TABLE 2.—Percentage of Shops stocking the various Types of Butter.

Butter.	First Survey. June 12th–July 11th, 1929.	Second Survey. Jan. 17th–Feb. 21st, 1930.
Northern Ireland Farm	56	46
Irish Free State Creamery	55	34
Packeted	37	29
Northern Ireland Creamery	34	18
Danish	5	30
Dairy	2	1
Bulk-Blended	1	1
Australian	—	28
New Zealand	—	6
Swedish	—	2

A number of milk distributors in Belfast have shops or dairies for the sale of milk and butter. Surplus milk which is not required for sale in liquid form is churned by these firms on their own premises. This type of butter is referred to in this section as "Dairy" butter.

3. The retail prices at which different types of butter were selling are shown in Table 3.

With the exception of Danish and dairy butter, prices were higher at the time of the Second Survey than at the First Survey. At the Second Survey Northern Ireland creamery, Irish Free State creamery and Danish were all selling at about the same price, with New Zealand and Australian about 1*d.* per lb. cheaper.

4. In both the First and the Second Surveys the type of butter most frequently stocked was farm butter. Measured by quantity sold, however, farm butter only occupied fifth place at the First Survey, and sixth place at the Second Survey. Almost 40 per cent. of the butter supply in summer consisted of Irish Free State creamery butter, and in winter almost 40 per cent. of the supply consisted of Danish butter. Whereas Irish Free State creamery, Northern Ireland creamery and Northern Ireland farm butter made up 76 per cent. of the total supply in the summer period, the supply in winter was made up to the extent of 71 per cent. by imported butter from Australia, New Zealand, Denmark and Sweden. Since practically all the packeted and dairy butter sold during the summer period was of Irish origin it is probably better to contrast the percentage of imported butter sold in the winter and summer periods. As compared with the 71 per cent. of Australian, New Zealand, Danish and Swedish butter sold at the time of the Second Survey, only one of these butters—Danish—was found during the First Survey, and it represented only 3 per cent. of the total supply.

TABLE 3.—*Number of Shops selling at the following Prices.**Belfast (212 shops)—First and Second Surveys.*

	Northern Ireland Farm.		Northern Ireland Creamery.		Northern Ireland Dairy.		Australian.		New Zealand.		Irish Free State Creamery.		Danish.		Swedish.		Bulk- Blended.		Packeted.			
	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.	1st.	2nd.		
2/0 ..	—	2	—	—	—	—	—	—	—	—	—	1	—	—	—	—	—	—	1	—	—	
1/11	2	5	—	2	—	—	—	—	—	—	—	1	—	1	4	—	—	—	—	—	1	3
1/10	11	31	5	10	—	—	—	3	—	2	17	23	4	28	—	—	—	1	—	34	44	
1/9 ..	9	29	24	16	1	—	—	13	—	4	41	34	6	28	—	2	—	—	—	34	13	
1/8 ..	49	18	41	9	3	1	—	30	—	3	57	11	—	2	—	2	—	—	—	9	—	
1/7 ..	—	2	3	—	—	—	—	10	—	3	1	—	—	—	—	—	—	—	—	—	—	
1/6 ..	31	6	—	—	—	1	—	2	—	—	—	—	—	—	—	—	—	—	—	—	—	
1/5 ..	11	1	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
1/4 ..	6	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	
Average	1/7·3	1/9·0	1/8·4	1/9·1	1/8·3	1/7	—	1/8·1	—	1/8·4	1/8·6	1/9·2	1/9·5	1/9·5	—	1/8·5	1/10	2/0	1/9·3	1/9·8		