

THE
AGRICULTURAL
REGISTER
1934-5

BEING A RECORD OF
LEGISLATION, ORGANIZATION, SUPPLIES
AND PRICES

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FOREWORD

THE first issue of *The Agricultural Register*, published a year ago, was prompted by the importance of the economic policy to which the agricultural crisis had given rise. So much had been done, and the methods of relief and of reconstruction were so varied, that some record of them and of their consequences seemed to be called for in the form of a book of reference for those interested, whether as producers, students of economic and social policy, or simply as taxpayers and consumers of food.

The sources upon which the inquirer must draw if he would have a comprehensive idea of the organization and progress of agricultural reconstruction and of the results of it are very numerous, and they are not readily accessible to the general reader. The Agricultural Economics Research Institute decided, therefore, to bring together and to summarize the information necessary if the position was to be understood, in the form of a concise book of reference.

The first results of the new State policy and of agricultural reorganization, as reflected in supplies and prices of agricultural commodities, were also summarized, and the *Register* included further sections dealing with farming experience in other directions during the year. The scope of the volume was limited to England and Wales, reference to Scotland and Northern Ireland being made only when these countries were also concerned.

The reception given to *The Agricultural Register, 1933-4* was very encouraging, and the whole edition was sold out before the end of the year. In the second volume, now issued, certain alterations in form and scope have been made. Legislation and reorganization in Scotland and in Northern Ireland are included. There has been, also, a rearrangement of the matter in the section dealing with administrative

action. Last year the new machinery had not proceeded very far in action, and emphasis was laid upon a description of it rather than upon its effects on commodities. In the present volume the machinery is taken as being well understood, and the matter in this section is arranged under commodities, thus bringing it into line with the section which follows, on Supplies and Prices.

The Director and his colleagues desire to express their cordial thanks to all those who have assisted in the supply of information necessary for the compilation of the volume. It is impossible to name them all, but particular mention must be made of the help received from the Markets Division and Economics Intelligence Branch of the Ministry of Agriculture, the Departments of Agriculture for Scotland and Northern Ireland, and the Executives of the Marketing Boards, Reorganization Commissions, and Committees, without whose generous co-operation it could not have been completed. Readers' criticisms and suggestions, too, have been welcome, and effect has been given to them so far as was practicable. The Director will be glad of further suggestions to improve the usefulness of future issues.

C. S. ORWIN,

Director.

AGRICULTURAL ECONOMICS RESEARCH
INSTITUTE, OXFORD.

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CONTENTS

I. INTRODUCTORY REVIEW

II. LEGISLATION

1. Milk Act	12
2. Cattle Industry (Emergency Provisions) Act	15
3. British Sugar (Subsidy) Act	17
4. Finance Act	17
5. Debts Clearing Offices and Import Restrictions Act	18
6. Unemployment Act	19
7. Road Traffic Act	19
8. Rural Water Supplies Act	20
9. Supply of Water in Bulk Act	20
10. Water Supplies (Exceptional Shortage Order) Act	21
11. Land Settlement (Scotland) Act	21
12. Marketing of Potatoes Act (Northern Ireland)	22
13. Agricultural Marketing Act (Northern Ireland)	23
14. Milk and Milk Products Act (Northern Ireland)	23
15. Diseases of Animals (Dairy Cattle) Act (Northern Ireland)	27
16. Agricultural Marketing (Pig Industry) Act (Northern Ireland)	28
17. Destructive Insects and Pests Act (Northern Ireland)	30

III. TRADE REGULATION

A. AGREEMENTS

1. Trade Agreements	31
2. International Wheat Agreement	40

B. QUANTITATIVE REGULATION

1. Chilled Beef	45
2. Frozen Beef	47
3. Live Cattle	48

4. Frozen Mutton and Lamb	49
5. Bacon and Hams	51
6. Processed Milk and Cream	53
7. Butter and Cheese	55
8. Eggs	56
9. Potatoes	57
10. Oats	59

IV. ADMINISTRATIVE ACTION

A. GENERAL	61
B. SCHEMES AND BOARDS	
1. Milk	63
2. Pigs and Bacon	115
3. Live Stock	
Reorganization Commissions for Fat Stock	138
National Farmers' Union Scheme	144
Reorganization Commissions for Eggs and Poultry	144
4. Potatoes	150
5. Hops	155
6. Sugar	158
7. Fruit	161
C. COMMITTEES	
1. Import Duties Advisory Committee	164
2. Market Supply Committee	167
3. Consumers' Committees	168
4. Committees of Investigation	173
5. Food Council	177
6. Agricultural Marketing Facilities Committees	177
7. Provisional Hops Committee	178
8. Bacon Indemnity Loan Committee	183
9. Technical Committee on Abattoir Design	184
10. Committee on Cattle Diseases	186
11. Sugar Industry Inquiry Committee	190

CONTENTS

vii

D. SUBSIDIES AND LEVIES

1. Milk	191
2. Fat Cattle	197
3. Wheat	200
4. Sugar Beet	202

V. SUPPLIES AND PRICES

A. *General*

1. Demand	205
2. Supplies	207
3. Prices	214

B. *Commodities*

1. MEAT

Cattle and Beef	222
Sheep, Mutton, and Lamb	228
Pigs and Pig Products	232

2. DAIRY PRODUCTS

Liquid Milk	238
Cream	240
Butter	243
Cheese	247
Processed Milk	250

3. EGGS AND POULTRY

Eggs	253
Poultry	257

4. CROPS

Wheat	261
Barley	265
Oats	268
Potatoes	269
Hops	275
Sugar Beet	276

5. FRUITS AND VEGETABLES

5. FRUITS AND VEGETABLES	284
------------------------------------	-----

6. WOOL

6. WOOL	291
-------------------	-----

VIII	CONTENTS	
C. <i>Requisites</i>		
1. Fertilizers		294
2. Feeding stuffs		295

VI. STATISTICS

A. CROPS AND GRASS		298
B. LIVE STOCK		303
C. WEATHER AND YIELD OF CROPS		307

VII. LABOUR

A. EMPLOYMENT		315
B. WAGES		320
C. UNEMPLOYMENT INSURANCE		327

VIII. MISCELLANEA

A. TITHE RENTCHARGE		330
B. CREDIT		334
C. LAND SETTLEMENT		342
D. RURAL WATER SUPPLIES		344
E. LICENSING OF BULLS		344
F. FOOT-AND-MOUTH DISEASE		347
G. COLORADO BEETLE		348
H. ROAD AND RAIL TRAFFIC ACT, 1933		349

APPENDIX

Statutory Rules and Orders		352
Table I. Numbers of Pigs Contracted for and Delivered under the Great Britain Pigs Marketing Scheme, 1933-4		377
Tables II-VII. Statistics of Milk Utilization and Prices		378
Table VIII. Average Monthly Retail Prices of Agricultural Produce		384
INDEX		385

I. INTRODUCTORY REVIEW

THE development of agricultural policy in 1934 has been confined, for the most part, to minor and amending Acts. The Departments of State, in co-operation with the agricultural industry, have been occupied in starting up the machinery of regulated production and marketing which had been brought into being by the Agricultural Marketing Acts of 1931 and 1933.

It may be convenient to summarize the position, to-day, of the principal agricultural commodities which had achieved protection in one form or another.

Sugar Beet enjoyed no direct assistance. Under an Act passed in 1925, manufacturers of home-grown sugar were guaranteed a subsidy for ten years, payable by the Treasury. There was no limitation of the quantity of production, and the subsidy, which was on a diminishing scale, was expected to set the industry on its feet in this time. But the fall in world sugar prices, together with other unforeseen conditions, made it clear that the home-grown sugar industry could not survive unaided, and the subsidy was continued for another year while a Committee appointed by the Minister of Agriculture considered the position, with instructions to make recommendations to the Government as to the future of assistance to the industry. Sugar-beet growers are awaiting the Report of the Committee with interest. The expansion of the crop, from nothing, to more than 400,000 acres in ten years is evidence of its value to them under the conditions which have been created. In the meantime, the sugar manufacturers, and likewise the National Farmers' Union, have prepared Sugar Marketing Schemes under the Agricultural Marketing Acts, for submission to Parliament. Details are given later, but, briefly, the proposal is to give up the Treasury subsidy in exchange

for a monopoly of manufacture which would enable manufacturers to fix sugar prices high enough to ensure the continued cultivation of sugar beet. The schemes are not likely to be considered by Parliament until the Report of the Committee has been received.

Wheat, unlike sugar beet, was in receipt of direct assistance, in the form of a guaranteed price. But it will be remembered that the guarantee was limited, under the Wheat Act, 1932, to a specified quantity of millable wheat, so that should this quantity be exceeded the actual price received by farmers would be proportionately less than the figure guaranteed. In effect, farmers would fix the price themselves, and the liability of the State was limited.

There have been no new developments of the wheat policy during the year, but a further increase in the acreage under wheat proves that the effective price is still attractive. This increase, together with an exceptional yield, will make the total quantity of wheat which competes for the subsidy still higher, and so much above the maximum set by the Act that growers must expect to receive a price considerably less than the figure of 45s. named in it. It will be interesting to see what effect the further reduction in price will have on the expansion of acreage and when an equilibrium between prices and acreage will be reached.

Hops have a special interest in the new agricultural order, because their growers were the first to organize a Marketing Scheme, and because the commodity has only one market. The hop-growing industry is more speculative, probably, than any other farming enterprise, and the imposition of a heavy import duty, though it went far to eliminate the competition of the foreigner, has had the effect of intensifying competition amongst English growers.

Marketing conditions for the crop of 1933 were peculiar,

for owing to the removal of Prohibition in America that country was scouring the world for hops, and the Hops Marketing Board fixed their prices accordingly. Brewers, unable to satisfy their requirements elsewhere, appealed against the figures to the Committee of Investigation, but they were non-suited. It was obvious at once that hop-growers would be stimulated by their profits to increase their output, and so the Hops Marketing Board applied to Parliament, in 1934, for sanction for an amendment of the Scheme. The principle of this amendment, which is dealt with later in this volume, is that every grower should be allotted a basic acreage quota and that hops grown in excess of it should take their chance of a market. The scheme met with opposition from the brewers, who feared exploitation, and from others who feared that the creation of vested interests might be a dangerous precedent, but after discussion by a joint committee, the brewers' opposition was withdrawn, and Parliament sanctioned the amendment.

Milk distribution under the Scheme administered by the Milk Marketing Board is surely one of the most remarkable achievements in the history of industrial organization. Indeed, the difficulties encountered have arisen more from the desire of the Board to maintain a high average of farmers' prices in the face of increasing supplies and a stationary demand, rather than from any weaknesses in the administrative machine.

The Board was unable to agree to the terms of the summer milk contract with the wholesalers, and prices were fixed by arbitrators at a level for liquid milk which caused much dissatisfaction to farmers. It would seem that the anticipated increase in the quantity of milk for manufacture during the summer months led the arbitrators to seek increased consumption of milk in liquid form by lowering its price. For the winter season, an agreement between the Board and the

distributors was reached at a higher price than in the previous winter period and with one month added to its duration.

However, the price-pooling operations are stimulating milk production in the areas of low costs, and during the summer the Milk Act was passed to support the average price of manufacturing milk by a Treasury contribution. Money was also voted to assist in the eradication of tuberculosis in dairy herds, and in collaboration with the President of the Board of Education a scheme was devised for the supply of milk to school-children upon reduced terms, the teachers administering it and the Government contributing one million pounds, spread over two years, towards its cost. The success of this scheme is such that the children are taking about two million gallons of milk monthly.

With these aids, the Milk Marketing Board was able to pay an average price throughout the year of 12.038*d.* per gallon to all registered producers. The difficulty that confronts it is how to maintain this average. Owing to the organization of milk marketing in Scotland independently from England and Wales, there has been competition from Scotland for the English market which the Milk Marketing Board of England and Wales was compelled to buy off by a monthly cash contribution. Moreover, the volume of milk for sale off the farm is increasing in the more remote districts, under the stimulus of the pool price, which has led dairy farmers not only to increase their output, but to abandon butter-making on the farm in favour of sale through the Milk Marketing Board. Milk for manufacture was coming on the market at the end of the year in quantities almost double those of twelve months before. The depression in the beef industry, too, is driving men from cattle-feeding to dairying.

The fact is, of course, that there is a great range of costs in milk production, and this is recognized by the division of the country into regions by the Milk Marketing Board for price-pooling purposes. The natural milk flow is in the summer

and autumn months, and farmers who take advantage of it have costs considerably lower than those who try to maintain an even flow through summer and winter alike. In the warmer, wetter, and grassier counties, too, costs are lower than in the eastern half of England, where longer housing and more artificial feeding are needed. The Milk Marketing Board has now to choose between accepting the present position and lowering the price of milk for liquid consumption, thereby forcing the more expensive producers out of business, or adopting the basic quota plan as applied under the amended Hops Marketing Scheme. Such a scheme would allot a milk quota to every registered producer, based presumably on his previous quantity of production, and none of the milk produced by him in excess of his quota would be sold under the pooling arrangement, but would be paid for by the Milk Marketing Board only at a lower price as manufacturing milk. From recent statements by its Chairman, it appears that the Milk Marketing Board is in favour of the restriction scheme rather than of lowering prices. The choice is difficult, for it lies between the maintenance of the present liquid prices in the interests of a section of the dairying industry, or a reduction of liquid prices in the interests of the rest of the industry and of the general body of consumers. There is a superabundance of milk in the country.

The question of milk retailers' margins has been raised in various ways during the year. The opinion has been expressed that the Milk Marketing Board would have done better not to intervene to fix retail prices, but to leave distributors to compete for their market to the probable advantage of the consumer and so, indirectly, of the farmer. It has been pointed out that retail prices in some places have been higher under the Milk Marketing Scheme than before, and industrial co-operative societies have stated that on their experience there is ample room for a cut in distributors' margins. But the question of retail distribution costs arises

not only in connexion with milk and involves many things such as the nature of the services performed and the redundancy of distributors, which the Milk Marketing Board can hardly be expected to tackle. At the same time, so long as the mother who sends her child to the farm or to the dairy to fetch her few pennyworth of milk in her own jug is charged at the same rate as the household which enjoys delivery twice daily in sterilized bottles, the Milk Marketing Board may feel, perhaps, that they might make some contribution to the problem of cheaper distribution.

Pigs destined for the bacon curers were under the control of the Pigs Marketing Board throughout the year. The first contract period, a short one, ran until the end of February, farmers being paid by the factories upon a formula under which pig-prices fluctuated with the prices of feeding-stuffs. But while this basis of contract was eminently satisfactory to the feeders, the curers were soon to discover that there was no necessary correspondence between the prices of feeding-stuffs and the market price of bacon, and they incurred losses. How these were recouped is described later, but for the second contract, which ran from 1 March until the end of the year, a new price-formula had to be devised which took account not only of fluctuations in feeding-stuffs prices but also in bacon prices. In operation, the formula gave farmers somewhat lower prices, while on the curer's side there were complaints that deliveries of pigs at their factories were very uneven, so that while they were engaged to capacity in some months, in others supplies were too short for efficiency of working.

The Pigs Marketing Board invited contracts for the third period, the year 1935, in November. Payment to feeders was to be on the same basis, but they were required to smooth out their deliveries to secure greater uniformity throughout the year. Difficulties arose at once. The natural habit of the

sow is to produce her litters in the spring and autumn, and if level deliveries of fat pigs must be given, the number is controlled by the ability of the farmer to arrange for farrowings out of season. Thus, the feeder who might deliver 250 pigs in a year at his own times might not be able to provide more than 12 or 15 pigs a month if called upon to give approximately level deliveries each month, his effective output being determined by the month of smallest supply.

In the result, the number of pigs contracted for 1935 was some half a million less than the total needed by the curers to keep their factories working on an economic basis, and a supplementary contract had to be offered to farmers, in which restrictions on the time of delivery were omitted. The total of the two contracts satisfied the curers.

In the latter part of the year, there was some discussion on a proposal for a Pigs Development Board. Under the Agricultural Marketing Acts, Development Boards may be set up for any commodity, with equal representation of the producers' and the distributors' or processors' Boards and persons appointed by the Minister of Agriculture. The object of these Boards is to plan the industry for mutual advantage, and virtually to arbitrate on differences arising between the two sides. Nothing, however, has materialized from the proposal, but it is likely that it will have to be reconsidered.

- *Potatoes* came under the control of a marketing scheme during the year. Registered growers were allotted acreage quotas, but the restriction differs from that imposed by the Hops Marketing Scheme in that there is no prohibition on new entrants into the industry, nor on extensions of acreage by growers already registered. Instead, a fine of £5 an acre is imposed on anything beyond the quota. There is, however, a restriction on the quantities of potatoes reaching the market, which operates by the regulation of the size of the riddle over which the potatoes are sorted. In times of plenty, such as the

present, the use of a larger mesh is ordered by the Board, so as to eliminate more of the smaller potatoes. It may be remarked, however, that effective control of operations conducted on the farm, such as riddling potatoes, must be very difficult.

The Potato Marketing Board does not intervene between growers and merchants to control prices, but potato dealers must be licensed, and sales must be conducted between the parties as principals and not on commission. Thus, except for the control of acreage and of the size of the potatoes marketed, trade in this product goes on as it always has. The crop in 1934 was a bountiful one, and in the autumn the import of foreign maincrop potatoes was prohibited except under licence. More than once in recent years the home market has been upset by arrivals of maincrop potatoes from the Continent, not in very large quantities, but sufficient to exert a psychological effect upon buyers detrimental to the home-producers. The prohibition is intended to protect them in times of plenty, while the power to grant import licences should secure the interests of the consumer in seasons of scarcity.

An interesting experiment in bulk distribution was organized by the Potato Marketing Board at the close of the year. By arrangements with merchants and retailers in a depressed area, which secured to each their margins, potatoes were to be deposited in quantity at certain centres in the area, for sale at reduced prices to the unemployed. The object of the experiment is to find out whether demand is stimulated by price reduction, and it might be tried with advantage with other commodities, particularly milk. In congested areas, there might well be a big unexploited market for commodities which people could fetch themselves from public depots, thus escaping high retail distribution costs.

Beef Cattle continued throughout the year to be the black

spot on British farming, and so far it has defied all the attempts at rehabilitation under the Agricultural Marketing Acts. A Reorganization Commission for the Marketing of Fat Stock issued its Report in the early summer. Its recommendations, summarized later, were concerned only with a long-term policy, while what the farmer wanted was something which would put up prices on the next market day. The market situation, of course, is dominated by the quantity of imports, both foreign and Dominion. Restrictive agreements have been negotiated for both, but the means for effective reductions are still to seek, in the face of the Ottawa agreements, and the necessities of export trade. With beef of first quality selling at 4*d.* a lb. live weight, the position of the industry was critical, and during the summer, Parliament enacted emergency legislation to provide a subsidy not exceeding £3,000,000 to the producers of fat cattle during the seven months ending 31 March 1935. The subsidy was expected to add about 5*s.* per head to the value of fat cattle. and to give the industry time to formulate a marketing scheme.

Poultry and Eggs have not been the subject of any special legislation during the year. The Reorganization Commissions appointed in 1933 have only recently issued their Reports.

Apart from legislative action at home, and the organization of production and marketing under it, the Government has been engaged in further measures for the assistance of farming by quantitative regulation of imports from abroad. Farmers, and their Marketing Boards, naturally enough, have urged constantly that they are entitled to their home market, and that imports should be regulated accordingly. For some products, import regulation has presented no difficulties. Bacon, for example, is imported in largest quantity from Denmark, a foreign country whose trading account with Britain is not balanced, and so the restriction of imports, based upon

the quantity of home production, was easily arranged, more particularly as the rise in bacon prices which followed control has left Denmark very little worse off, probably, in the result. Potatoes, too, are imported only in small quantities, again from foreign countries, and it was easy to prohibit the entry of maincrop varieties during such times as the British crop sufficed.

But the control of imports of meat and dairy products presents difficulties which have not yet been solved. Cheese, butter, and condensed milk from overseas keep the price of manufacturing milk at levels which embarrass the Milk Marketing Board, while imports of meat at low prices have necessitated the beef subsidy referred to above. These commodities present obvious difficulties. Unlike bacon, they are consigned from countries, either our own Dominions or foreign, which are debtor nations. Unlike potatoes, they come in quantities not negligible, but immense. For the time being, the Ottawa Agreements prevent any reduction of supplies from Empire sources, and Trade Agreements with Argentina for restrictions, mainly voluntary, have not materially affected prices. Can the Dominions and Argentina pay the interest on the loans and capital of British investors except in exports to Britain? And could a more prosperous British countryside make a sufficient market for British manufactures which these countries are now taking in exchange?

A full account of the Trade Agreements with the various countries is given later in this volume. Restriction of imports has, in most countries, been voluntary, and though the permitted quantities have generally been exceeded, the spirit of the agreements has been fairly well observed.

This completes this brief outline of special measures taken for the protection of the agricultural industry during 1934, full details of which are given in the following pages. Under the Import Duties Act, 1932, many agricultural and horti-

cultural products are protected, while at the same time, farm requisites, not a few, are taxed. Details of the products and requisites and of the duties imposed upon them in 1934 will be found in the Appendix.

Taking everything together, the year has been one of immense activity in the agricultural world. Much of the new organization is proceeding of necessity by experiment, if not, indeed, by the process of trial and error. The coming year may expect to see the introduction of amending legislation in more than one direction, based on the experience of the past.

II. LEGISLATION

Only Public and General Acts are included, and these only so far as they are of agricultural interest.

I. Milk Act, 1934

(24 & 25 Ggo. V, c. 51, 31 July 1934)

The Act came into operation on 15 August 1934.

Main provisions.

A. The Act provides for a guaranteed standard price of 5*d.* a gallon from April to September and 6*d.* from October to March for milk used for manufacture between 31 March 1934 and 1 April 1936. The sums needed to make up the standard price are calculated according to whether the milk is manufactured:

- (a) in factories not operated by the Milk Boards,
- (b) in factories operated by the Milk Boards,
- (c) into cheese on farms.

The amount advanced per gallon is, for (a), the standard price less either the cheese-milk price¹ or the net cost to the purchaser, whichever is the less; for (b), the standard price less either the cheese-milk price or the appropriate manufacturing price,² whichever is the less; for (c), the same amount as is arrived at for (a).

¹ The cheese-milk price for any month is the average wholesale price per lb. in Great Britain for the previous month of New Zealand and Canadian 'finest white', less 1½*d.* It is certified by the Minister of Agriculture and Fisheries and the Secretary of State for Scotland, and is published, together with the method of computation, in the *London and Edinburgh Gazettes*, viz. for April, 1934, 3·42*d.* per lb.; May, 3·40*d.*; June, 3·48*d.*; July, 3·75*d.*; August, 3·83*d.*; Sept., 3·86*d.*; Oct., 3·72*d.*; Nov., 4·04*d.*; Dec., 4·25*d.*

² The appropriate manufacturing price is the wholesale price at which milk used by the Board for manufacturing into any particular product could have been bought by any other person for the same purpose. It is to be certified by the Minister.

The money required for these advances, including those for milk made into cheese on farms, is payable to Milk Marketing Boards out of public funds. But if between 1 April 1936 and 31 March 1938 the cheese-milk price for any month exceeds the standard price by more than one penny, then (by way of repayment of the advances made to them by the Minister during the previous two years) the Boards are liable to pay the Minister the difference between the cheese-milk price and the standard price, less one penny, for the milk manufactured that month. The Boards will not be required to repay during 1936-8 more than they received during 1934-6, nor will they be required to repay any balance outstanding after 31 March 1938.

The above details apply to Great Britain. For Northern Ireland the Minister of Agriculture and Fisheries is to make advances to the Government of Northern Ireland to secure the same results. These advances, which are repayable in the same way as those in Great Britain, must not amount to more than £200,000 in the first year. For the second year, the amount is to be agreed between the Treasury and the Government of Northern Ireland.

Various provisions are made for enforcing the repayments due to the Exchequer as a result of this Act, and provision is also made for advances and liabilities for repayment to continue despite any revocation of milk marketing schemes.

B. The Act makes provisions for improving the quality of the milk supply by:

- (1) authorizing the Minister, with the approval of the Treasury and after consultation with the Minister of Health, to spend during 4 years¹ a sum of not more than £750,000 of Parliamentary funds in securing so far as

¹ The 4 years are to be consecutive and are to begin on a day to be appointed by the Minister of Agriculture and Fisheries and the Secretary of State for Scotland.

practicable that milk for human consumption is pure and free from the infection of any disease. Before the end of the 4 years, the Minister, after consultation with Milk Boards, may by Order require Boards to pay any sum not exceeding one penny a gallon (for milk produced after the end of the 4 years) to registered producers whose methods of production comply with such standards of purity and freedom from disease as may be specified in the Order.

- (2) amending the Milk and Dairies (Amendment) Act, 1922, so that the Minister of Health, after consulting the Minister of Agriculture and Fisheries may by Order:
- (a) prescribe special designations for milk of any description,
 - (b) provide for the granting by himself or by local authorities of milk licences authorizing the use of such special designations,
 - (c) prescribe periods and conditions for milk licences,
 - (d) provide for revocation or suspension of milk licences,
 - (e) provide for aggrieved persons to appeal.

Safeguards are provided against the improper use of special designations and the use of misleading descriptions of milk.

In the meantime the Milk (Special Designations) Orders at present in force continue until revoked (viz. S.R. and O., 1923, No. 601 and 1930, No. 327, which relate to 'Certified', 'Grade "A" (T.T.)', Grade "A" and "Pasteurized" in England and Wales and in Scotland respectively). See also, S.R. and O. 1934, No. 1317, p. 361.

C. The Act makes provisions for increasing the demand for milk. The Minister on approving arrangements made by Milk Marketing Boards for increasing the demand for milk, may make pound for pound contributions from Parliamen-

tary funds to the Boards' expenses incurred under those arrangements.¹ The total payment by the Minister under this head is limited to £1,000,000 and must be made within two years of the date on which arrangements were first submitted to him.

Expenses incurred by selling milk at reduced prices under approved arrangements are to be treated as expenses which qualify for the Minister's contribution.

Arrangements under this head have to be laid before Parliament by the Minister.

D. The Act provides among the general and supplementary provisions for the Boards to pass on to the registered producers the appropriate payments for milk under the Act (viz. manufacturing milk, pure and disease-free milk, and milk sold at a reduced price under section C above).

Any registered producer who contravenes the determinations of the appropriate Board concerning the disposal of his milk (provided such determinations are made after consultation with a committee approved by the Minister) becomes liable for a monetary penalty.

Boards have power to enforce contracts between registered producers and purchasers of milk although the Boards themselves are not parties to such contracts.

• 2. Cattle Industry (Emergency Provisions) Act, 1934

(24 & 25 Geo. V, c. 54, 31 July 1934)

A temporary measure to relieve the position of the producers of fat cattle.

¹ Arrangements made by the Milk Marketing Board for England and Wales were approved by the Minister on 25 September 1934. They concern the supply of milk in schools and in authorized courses of instruction for unemployed boys and girls, &c., at reduced rates, and came into operation on 1 October 1934. Similar arrangements for southern Scotland took effect on 5 November 1934, and for northern Scotland on 10 December 1934.

Main provisions.

The Act established a fund ('the Cattle Fund') to be administered (subject to Treasury direction) by the appropriate Ministers concerned with agriculture in the United Kingdom.

The Treasury is authorized to advance to the Cattle Fund during the year ending 31 March 1935 not more than £3,000,000, repayable on or before that date.¹

Parliament may provide money for the Cattle Fund.

Payments may be made out of the fund to producers of steers, heifers, or cow-heifers² (or of their carcasses) which are certified to be of prescribed standards,³ sold between such day after 31 August 1934 as the Ministers may appoint⁴ and 31 March 1935.

Payments shall not exceed 5s. a live cwt., nor 9s. 4d. a dead cwt., and depend on Orders made by the Ministers and approved by the Treasury. These Orders may also regulate the methods of determining the weights of cattle, and specify the minimum weight below which cattle shall not qualify for certificates.⁵

Certificates shall not be granted for animals

- (a) castrated after attaining the age of 9 months,
- (b) in milk,
- (c) more than 5 months advanced in pregnancy, or
- (d) imported less than 3 months previously.⁶

¹ This was intended to carry the fund through until a supplementary estimate is laid before Parliament in February or March 1935.

² Defined as 'any female bovine animal which has calved, but which has not grown more than six permanent incisor teeth'.

³ To be prescribed by regulations of the Ministers (see S.R. & O., 1934, Nos. 928 and 1463).

⁴ The day appointed was 1 September 1934.

⁵ See S.R. & O., 1934, No. 929.

⁶ For purposes of this Act, cattle from the Isle of Man count as imported.

Carcasses must be dressed in accordance with regulations made by the Ministers.

Arrangements and regulations as above must be laid before Parliament.¹

The Ministers shall (by Order to be laid before Parliament) provide for the marking of imported cattle until 31 March 1935.²

The Ministers shall appoint a committee ('the Cattle Committee') to advise them, &c., under the Act.³

3. British Sugar (Subsidy) Act, 1934

(24 & 25 Geo. V, c. 39, 25 July 1934)

This Act extends by eleven months (i.e. until 31 August 1935) the period for which the home-grown sugar Subsidy is payable. It modifies the basis of the Subsidy on molasses. The Act does not apply to Northern Ireland.

4. Finance Act, 1934

(24 & 25 Geo. V, c. 32, 12 July 1934)

Among other provisions:

- (a) enacts reduced rates of duty on such quantities of sugar, originating from the Colonies, except Southern Rhodesia, from Protectorates and from Mandated Territories, as are allowed to be imported by quota, viz, not exceeding 375,000 tons between 18 April 1934 and 31 March 1935, and 360,000 tons in any subsequent financial year.

¹ See *Particulars of Arrangements for Purposes of Section 2 of the Cattle Industry (Emergency Provisions) Act, 1934*, presented to Parliament, August, 1934. Cmd. 4678, H.M. Stationery Office, 3d. net.

² See S.R. & O. 1934, No. 853.

³ The chairman is Lt.-Col. Sir John Chancellor, G.C.M.G., G.C.V.O., the secretary, C.T. Houghton. The address of the Committee is Sanctuary Buildings, Great Smith Street, London, S.W. 1.

Corresponding drawbacks are allowed on sugar and molasses made in the United Kingdom from the above colonial 'quota sugar'.

- (b) provides that if any goods subject to both the general *ad valorem* duty and an additional duty cease to be chargeable with the *ad valorem* duty, the additional duty (unless it is one imposed by the Ottawa Agreements Act, 1932) ceases also.
- (c) imposes forfeiture as well as customs penalty on dutiable goods smuggled into Northern Ireland from the Irish Free State. (See S.R. and O., 1934, No. 732.)
- (d) alters the excise duties on mechanically propelled vehicles as from 1 January 1935 (e.g. to 15s. per unit of horse-power for vehicles exceeding 6 horse-power, &c.).
- (e) alters income tax in certain particulars (e.g. reduces standard rate from 5s. to 4s. 6d. in the pound; affects certain easements, mining royalties, &c.).
- (f) repeals the land tax provisions of the Finance Act, 1931, except section 28 of that Act, which provides that instruments effecting:
 - (i) the transfer on sale of the fee simple of land,
 - (ii) the leasing of land for seven years or more, and
 - (iii) the transfer on sale of any such lease, must be produced to the Commissioners of Inland Revenue.
- (g) deals with estate duty on annuities, &c.

5. Debts Clearing Offices and Import Restrictions Act, 1934

(24 & 25 Geo. V, c. 31, 28 June 1934)

This Act remains in force until 30 June 1936 only. It empowers the Treasury in certain circumstances to set up clearing offices for collecting and dealing with payments due to British traders from foreign countries where such pay-

ments are subjected to restrictions, prohibitions, &c. It empowers the Board of Trade (by Order laid before Parliament) to prohibit or restrict the importation of goods from foreign countries which impose quantitative restrictions on British goods.

6. Unemployment Act, 1934

(24 & 25 Geo. V, c. 29, 28 June 1934)

Section 20 lays down that the Unemployment Insurance Statutory Committee (a body set up under the Act) shall, as soon as may be, make proposals for the insurance against unemployment of persons employed in agriculture, horticulture, and forestry.¹ This section does not apply to Northern Ireland.

7. Road Traffic Act, 1934

(24 and 25 Geo. V, c. 50, 31 July 1934)

The various provisions of the Act came into force on days as appointed. The Act applies, with modifications, to Scotland, but not to Northern Ireland.

Main provisions affecting agriculture:

• I. Enacts a revised schedule of speed limits for passenger vehicles, goods vehicles, and locomotives and motor tractors. Date of operation, 1 October 1934; see S.R. and O. No. 994.)

II. Heavy goods vehicles may be driven on roads only by persons licensed for the purpose by the Chairman or Deputy Chairman of the Traffic Commissioners of the appropriate traffic area. This section does not apply to the driving of vehicles of the following descriptions and solely in the course

¹ See also p. 327.

of trade, or in agriculture: locomotive ploughing engines, tractors, agricultural tractors, and other agricultural engines, not being engines or tractors used for hauling on roads any objects except their own necessary gear, threshing appliances, farming implements, or supplies of fuel or water required for the purposes of the vehicle or for agricultural purposes, nor does it apply to a person already licensed so long as his licence remains in force. (Date of operation, 18 August 1934; see S.R. and O. No. 958.)

8. Rural Water Supplies Act, 1934

(24 Geo. V, c. 7, 28 March 1934)

The purpose of this Act is to empower the Minister of Health to contribute up to £1,000,000 towards the expenses of providing or improving rural water supplies. The Department of Health for Scotland may make similar contributions (not exceeding £137,500). The Act does not extend to Northern Ireland.

It is intended that contributions shall be given only where the provision of water supply would be impracticable without them, and that they shall be limited to the amounts necessary after allowing for reasonable charges on those already liable. Normally, the contributions will be a lump sum towards capital cost, but in exceptional cases they may be annual payments for not more than 20 years.

9. Supply of Water in Bulk Act, 1934

(24 & 25 Geo. V, c. 15, 17 May 1934)

This Act enables local authorities, companies, or boards, &c., who are empowered by Parliament to supply water, to give and take supplies of water in bulk to or from each other.

The Act does not apply to Scotland or Northern Ireland.

10. Water Supplies (Exceptional Shortage Orders) Act, 1934

(24 & 25 Geo. V, c. 20, 17 May 1934)

This Act enables special measures to be taken to meet shortage of water supplies due to the exceptional drought. The Act is not concerned with the provision of permanent supplies or to meet normal expansion. Only if it is necessary to tap a new source in order to meet the shortage, and permanent works are thereby necessary (which, however, must be completed in 6 months), can the taking of water or the regulating of supplies (including the entry on, the use of, and the purchase of land) under this Act be authorized for an indefinite period. Otherwise, Orders under the Act may not be in force for more than 6 months, and the Act itself comes to an end on 31 December 1935.

Under the Act, the Minister of Health, having regard to the interests of all users of the water, may make Orders:

- (a) authorizing suppliers of water to take water from any specified source,
- (b) to suspend or modify restrictions, &c., affecting the water supply,
- (c) to prohibit or limit the taking of water from a specified source and the use of water for particular purposes, &c.,
- (d) to regulate the control of sluices, &c.

The Act provides, among other things, for compensation to be paid to parties who are interested in the source of the water or in the land, or who are injured by the taking of the water, or by the entry on or use of the land.

The Act applies, with modifications, to Scotland, but not to Northern Ireland.

11. Land Settlement (Scotland) Act, 1934

(24 & 25 Geo. V, c. 35, 12 July 1934)

Provides that for 3 years (viz. from 1 April 1934 to 31 March 1937) an annual sum not exceeding £275,000 shall be

voted by Parliament to be paid into and administered as part of the Agriculture (Scotland) Fund, at the disposal of the Department of Agriculture for Scotland, for facilitating the constitution of new landholders' holdings, the enlargement of landholders' holdings, the improvement and rebuilding of dwelling houses or other buildings of landholders and cottars, &c.

[NOTE: under previous Acts, viz. The Small Landholders' (Scotland) Act, 1911, and The Local Government (Scotland) Act, 1929, the annual sum hitherto available for these purposes has been £200,000.]

12. Marketing of Potatoes Act (Northern Ireland), 1934

(24 & 25 Geo. V, c. 14, 28 June 1934)

Extends and amends the provisions of the 1928 Act.

Main provisions:

Authorizes the Ministry of Agriculture to prescribe standards of quality, grades, marks, and packings for potatoes sold in Northern Ireland; imposes penalties for infringement; authorizes the Ministry's officers to enter, inspect, and take samples from, premises used or suspected of being used for the potato trade (including docks, vessels, vehicles, &c., used in the conveyance of potatoes, and also markets); authorizes the Ministry of Agriculture to revoke or suspend licences for sufficient reason; lays down that licences remain in force until 31 August each year, and are renewable annually; the fee for a licence is £5; cancels licences under the 1928 Act as from the date of the commencement of this Act; imposes on each licence-holder the payment of a deposit (not exceeding £15) on account of fees payable for examination of potatoes, &c. The Act came into operation on 1 September 1934 (except that licences might be granted at any time after 28 June 1934). (See S.R. and O. No. 74, N. I.)

13. Agricultural Marketing Act (Northern Ireland), 1934

(24 & 25 Geo. V, c. 6, 5 June 1934)

Amends the Agricultural Marketing Act (Northern Ireland), 1933, so as to provide the necessary financial arrangements for the raising of a loan by the Bacon Marketing Board out of which to compensate curers for losses sustained during the first contract period, when they adhered to the standard price fixed by the Pigs Marketing Board although the home-production of bacon and hams was so great as to cause a fall in market prices. (See S.R. and O. No. 94, N. I.)

14. Milk and Milk Products Act (Northern Ireland), 1934

(24 & 25 Geo. V, c. 16, 28 June 1934)

The Act came into force on 28 June 1934, except those parts of it which deal with the sale of milk by grades of quality, and with licences for the sale of milk, butter, and margarine. These come into force on days to be appointed by the Minister of Agriculture.¹

Main provisions.

1. All milk² for sale is brought under the Act, and it can only be sold or described according to the following four designations (known as 'Grades'):

- *Grade A*, i.e. from cows which have passed the double intradermal test, and being milk of which the bacteriological count and the absence of *bacillus coli* comply with standards to be prescribed. (See S.R. and O. No. 69.)

Grade B, i.e. from clean and healthy cows which show no clinical symptoms of tuberculosis, and being milk of

¹ See S.R. and O. Nos. 103 and 114 (N. I.), which appointed 16 December 1934 for the sale of milk, butter and margarine under licence.

² Throughout this Act 'milk' means cows' milk.

which the bacteriological count, the temperature, and the absence of *bacillus coli* comply with standards to be prescribed. (See S.R. and O. No. 70.)

Grade C, i.e. from clean and healthy cows which show no clinical symptoms of tuberculosis, and being milk which complies with a standard of cleanliness to be prescribed, when submitted to the filtration test or such other test as may be prescribed. (See S.R. and O. No. 71.)

Grade D, i.e. milk not included in Grades A, B, or C.

The description 'Pasteurized' may be applied to Grades B and C, if pasteurized according to prescribed conditions. (See S.R. and O. Nos. 70 and 71.)

Grades A and B must be sold in bottles or in approved containers (except when sold wholesale).

Only Grades A, B, and C may be sold for human consumption.

2. All sellers of Grades A, B, or C must be licensed either as producers or as distributors. The licences specify whether the milk may be sold as 'pasteurized'. Fees are payable for licences. Licensees must keep records and furnish returns.

3. The Ministry¹ may make regulations for prescribing the requirements to be observed in the transport of milk by persons other than licensed producers or distributors.

4. With certain exceptions, sellers of butter and margarine, must be licensed. (Exceptions include farmers who make butter from their own cows' milk; see also S.R. and O. No. 82.) Fees are payable for licences. Records must be kept and returns furnished.

5. There is constituted the Joint Milk Council for Northern Ireland, consisting of 3 members appointed by the Minister of Agriculture (of whom 1 is chairman), 3 representatives of

¹ In this description of the Act, the Ministry means the Ministry of Agriculture for Northern Ireland, unless otherwise stated.

consumers (appointed by the Minister of Home Affairs), 7 members elected by licensed producers, 4 members elected by licensed distributors. The Ministry may appoint a secretary, and the Council may employ officers and servants (subject to the approval of the Ministry of Finance). Members, officers, and servants and the Council's expenses may be paid by the Ministry (subject to similar approval).

6. The Council is to regulate sales of milk by determining prices and the terms on which Grades A, B, and C may be sold by licensees, and by prescribing terms of and forms of contract.

If the Council (apart from the members appointed by the Minister of Agriculture) are not unanimous as to the prices or terms on which Grades A, B, and C may be sold, the 3 members appointed by the Minister decide. This does not apply to prices unless approved by the Ministry, nor to milk sold to a creamery.

The Council advises and assists the Ministry about standards of milk, and conditions for the issue of licences, &c.

7. Existing contracts which conflict with a determination of the Council (made under para. 6, above) may continue in certain circumstances.

8. Authorized officers have power of entry into and inspection of licensees' land or premises, and of taking and examining samples of milk.

9. All regulations made by the Ministry for carrying this Act into effect must be laid before Parliament.

10. Penalties are laid down for offences under the Act.

11. (a) There is to be established the Milk Fund, under the administration and control of the Ministry.

(b) There shall be paid into the Milk Fund (i) all sums received under the Act by the Ministry, and (ii) the Milk Industry Assistance Grant (see para. 12, below).

(c) There shall be paid out of the Milk Fund (i) a

payment ('the equalization payment') for milk delivered to creameries¹ and used for cream or butter. The payment will be (a) between 1 April 1934 and 31 March 1936, such sum as will raise the average price paid by all creameries for such milk to 5*d.* a gallon in summer (April to September) and 6*d.* in winter (October to March), and (b) after 31 March 1936 a sum to be prescribed from time to time, not greater than is required to raise the price to the same figures;

(ii) a bonus not exceeding 2*d.* per gallon for Grades A and B and 1*d.* for Grade C, delivered to creameries by licensed producers and used for making cream or butter;

(iii) such sum as may be determined, in aid of Parliamentary moneys, for defraying the expenses of the Ministry and the Joint Milk Council in carrying out the Act; and

(iv) contributions, as determined by the Ministry, towards approved schemes for eradicating disease among dairy cattle, the encouragement of milk consumption or the supply of milk to school children at a cheap rate.

- (d) The Ministry may reduce or withhold the equalization payment in the case of inefficient creameries.
- (e) Temporary advances may be made to the Milk Fund by the Ministry of Finance.
- (f) The accounts of the Milk Fund, kept in prescribed form, must be certified and reported on by the Comptroller and Auditor-General every year and laid before Parliament.

¹ i.e. premises registered as central creameries or as auxiliary creameries under Part I of the Marketing of Dairy Produce Act (Northern Ireland), 1929 (see S.R. & O. 1934, No. 15 of Northern Ireland).

12. (a) Any sum paid to the Exchequer of Northern Ireland by the Exchequer of the United Kingdom to assist the milk industry ('the Milk Industry Assistance Grant') will be paid over to the Milk Fund.
- (b) If, between 1 April 1936 and 31 March 1938, the average price paid in any month by creameries for milk exceeds 6*d.* a gallon in summer or 7*d.* in winter, the Ministry may require creameries to deduct for that month a levy equal to the amount by which the price exceeds these sums; the proceeds of the levy to be paid through the Milk Fund to the Exchequer of Northern Ireland.

15. Diseases of Animals (Dairy Cattle) Act (Northern Ireland), 1934

(25 Geo. V, c. 2, 21 December 1934)

The main purposes of the Act are: (1) to bring the Animal Diseases Acts into conformity with the Milk and Milk Products Act, (2) to eliminate the duplication of services which at present exists (by transferring to the Ministry of Agriculture in respect of liquid milk producers the duties hitherto imposed on Local Authorities by the Dairies and Cowsheds Order and the Bovine Tuberculosis Order), and (3) to provide a whole-time veterinary service for milk.

The Act comes into force on a day to be appointed by the Minister of Agriculture.

Main provisions.

1. The Ministry of Agriculture may make orders (subject to the Diseases of Animals Acts (Northern Ireland, 1894 to 1932), so that where tuberculosis in cattle exists or is suspected, cattle may be slaughtered, and compensation paid (out of the General Cattle Diseases Fund for Northern Ireland). The cost of inspection of cattle by the Ministry's inspectors is to be included in the sum to be certified as

required for the purposes of the Diseases of Animals Acts. The equivalent of three-fourths of the compensation paid by the Ministry for cattle slaughtered is to be paid by Parliament to the general account of the General Cattle Diseases Fund for Northern Ireland.

2. The Ministry of Agriculture is empowered to provide for the inspection by its own veterinary inspectors of milk cattle.

3. Provisions of the Tuberculosis Prevention (Ireland) Act, 1908, which relate to the destruction of cows with tuberculous udders and to certain powers of urban district councils, are repealed.

4. Compensation is provided for veterinary officers who lose employment through this Act.

16. Agricultural Marketing (Pig Industry) Act (Northern Ireland), 1934

(25 Geo. V, c. 3, 21 December 1934)

The purpose of the Act is to improve the working of the Pigs and Bacon Marketing Schemes. It came into force on 1 January 1935.¹

Main provisions.

1. Power is given to the Ministry of Agriculture to regulate the production of bacon by allocating bacon quotas to individual curers. Curers already licensed are safeguarded against undue restriction by quota.

2. New licences to bacon-curers can only be granted subject to the approval of the Pig Industry Council (see section 4, below), and subject to the Council's conditions.

3. Bacon-curers' licence fees are increased.

4. There is established the Pig Industry Council for Northern Ireland, consisting of:

¹ Except section 5, which deals with the duties and powers of the Pig Industry Council, not yet constituted. (See S.R. and O., No. 127, N. I.)

3 members (including the Chairman) appointed by the Minister of Agriculture,

3 members representing licensed bacon-curers,

3 members representing pig producers.

5. The duties of the Council include (a) the determination (subject to approval by the Ministry of Agriculture) of prices at, and terms on which pigs may be sold by producers, (b) advising the Ministry of Agriculture as to the granting of licences to bacon-curers, (c) dealing with the registration of contracts (see section 9, below), (d) advising the Ministry as to production, marketing and grading of pigs and bacon, and the encouragement of education and research, &c.

6. Contributions and levies payable by pig producers for pigs sold to a bacon-curer must be deducted from the price paid by the curer, and paid to the Ministry to be passed on to the Pigs Marketing Board.

7. The Ministry of Agriculture may make regulations for the grading, marking, packing, &c., of pigs, bacon, &c. (prices, &c., being determined by the Council).

8. The Ministry is empowered to enforce the determinations of the Pigs Marketing Board as regards the descriptions of pigs which may be sold and the prices and terms of sale, &c. Sections 5 and 7, above, leave the Pigs Marketing Board free to sell pigs in any way determined by the Board under the Pigs Marketing Scheme. [These sections are designed to prevent individual curers and groups of curers from breaking away from prices, &c., negotiated by the Pigs Board with the Bacon Board.]

9. The Council is given power to register certain contracts which conflict with their determinations under sections 5 or 7, above.

10. Licensed bacon-curers are compelled to furnish records of their bacon production and their purchases of pigs, &c.

11. The Pig Industry Fund is established to receive

certain sums due under the Act, licence fees and such contributions from the Pigs and Bacon Marketing Boards as may be determined by the Ministry after consultation with the Council; and to defray certain of the Ministry's and the Council's expenses, schemes for education and research, &c.

**17. Destructive Insects and Pests Act (Northern Ireland),
1934**

(24 & 25 Geo. V, c. 4, 8 May 1934)

Amends the Acts of 1877 and 1907.

Main provisions:

Orders under the Acts may (a) empower inspectors to have infected crops removed or destroyed, &c.; (b) impose fees for certificates given after inspections; (c) impose penalties for offences.

The Ministry of Agriculture may pay compensation for crops destroyed under (a) above. Provisions are laid down for assessing the compensation.

III. TRADE REGULATION

A. AGREEMENTS

1. Trade Agreements

DURING 1933, bilateral trade agreements were signed with Denmark, Sweden, Finland, Argentina, Norway, and Iceland.¹ Notes were exchanged with Germany, Estonia, and Latvia, and there were preliminary discussions with Poland and Lithuania. These agreements were intended, in the main, to accord full most-favoured-nation treatment to countries which were willing to meet various requirements in regard to the treatment of United Kingdom goods.

In 1934, the policy of bilateral negotiations was continued and agreements were signed with nine countries. The full text of the Convention and Supplementary Agreement with the Argentine were published, and agreements were signed with Egypt, the Union of Soviet Socialist Republics, France, Lithuania, Estonia, and Latvia. Notes were exchanged with France, Germany, and the Netherlands. Commercial negotiations with Uruguay, Poland, Italy, Turkey, and Spain were commenced, and the negotiations with Poland were maintained.

The following notes deal only with the provisions affecting imports of agricultural products into the United Kingdom, and not with the agreements and concessions affecting exports from the United Kingdom.

The dates of operation are given as follows:

Country	Date of operation
Argentina	1 May 1933
Egypt	16 Feb. 1934
U.S.S.R.	21 Mar. "
France	1 July "
Lithuania	12 Aug. "

¹ *The Agricultural Register, 1933-4*, p. 45, 1934.

<i>Country</i>	<i>Date of operation</i>
Germany	20 Aug. 1934
The Netherlands	1 Aug. „
Estonia	8 Sept. „
Latvia	12 Oct. „

I. *Argentina*

The Supplementary Agreement which was signed at Buenos Aires on 26 September 1933, and published in 1934,¹ provided that the following articles, produced or manufactured in the Argentine Republic, from whatever place arriving, shall not on importation into the United Kingdom be subjected to duties or charges other or higher than those specified:

<i>Article</i>	<i>Rate of duty</i>
Meat, i.e. beef, veal, mutton, lamb, pork, bacon, ham and edible offals, but not including extracts and essences of meat or meat preserved in any air-tight container	Free
Meat extracts and essences and meat preserved in air-tight containers, excluding meat pastes, whether mixed or not, and sausages	10 per cent <i>ad valorem</i>
Wheat in grain	2s. per qr. of 480 lb.
Linseed	10 per cent. <i>ad valorem</i>
Maize in grain, not being flat white maize	Free
Quebracho extract	10 per cent. <i>ad valorem</i>

In addition, it was agreed that there were to be no quantitative limitations on imports of the following goods, produced or manufactured in the Argentine Republic:

Wheat in grain.	Raw wool.
Maize in grain, not being flat white maize.	Unrefined tallow.
Linseed.	Raw horsehair.
Bran and pollards.	Sausage casings.
Sharps and middlings.	Premier jus.
	Quebracho extract.

¹ Convention and Supplementary Agreement Treaty Series No. 2 and No. 3, 1934. Cmd. 4492 and 4494, 1934.

If quantitative limitations were placed on imports of articles other than the above, equitable treatment was to be accorded to such goods produced or manufactured in the Argentine, having regard to the proportion of the total foreign imports of such articles which has been supplied by the Argentine in recent years. Further, the United Kingdom Government will consult with the Argentine Government before any allocation is made for such article to be imported from Argentina.

The Agreement remains in force for three years from the date of ratification, 7 November 1933, and thereafter, unless notice of termination is given, until six months after the date on which such notice is given.

2. *Egypt*

The Provisional Commercial Agreement concluded by an Exchange of Notes dated 5-7 June 1930 expired on 16 February 1934. As a result of an Exchange of Notes dated 13-15 February 1934, it remains in force for a further period of one year, until 16 February 1935. This Agreement continues reciprocal most-favoured-nation treatment for products and manufactures of each country.

3. *Union of Soviet Socialist Republics*

A temporary agreement was signed in London on 16 February 1934, and became operative on the date of ratification, 21 March 1934.¹ It revives mutual most-favoured-nation treatment for trade between the U.S.S.R. and the United Kingdom, subject to the qualification that it may be withdrawn, upon failure of negotiations and upon given notice for any particular commodity. The agreement also provides a sliding scale by which an equality in the approximate balance between imports and exports may be reached in five years²

¹ Temporary Commercial Agreement, Treaty Series No. 11 (1934), 16 February 1934. Cmd. 4567, 1934.

time instead of the large surplus of imports now taken by the United Kingdom. Diplomatic privileges were renewed for the Russian Trade Delegation.

The agreement remains in force until terminated by six months' notice by either country.

4. *France*

In February the French Government denounced the commerce conventions made in 1826 and 1882, as from 12 May. Negotiations were started for a new treaty, and it was agreed that pending its conclusion the 1882 Treaty should be continued, with the exception of certain clauses, on the understanding that neither country would invoke the provision of the Convention for quantitative restrictions on the importation of goods from one country into another.¹

An agreement was signed on 27 June 1934, which operated provisionally, pending the exchange of ratifications, from 1 July.² Its object was to secure most-favoured-nation treatment between the two countries, and it was particularly concerned with quantitative restriction on imports into France. Of interest to agriculture was the removal of the discriminatory surtax of 20 per cent. upon feathers imposed by the Order of 9 February 1934.³ Duties on certain goods were limited for the duration of the Agreement as follows:

<i>Article</i>	<i>Rate of duty</i>
Cut flowers:	
Snowdrops	2d. a lb. from 1 Dec. to '31 Jan.
Freesia	2d. a lb.
Ranunculus	2d. a lb.
Roman hyacinth	2d. a lb. from 1 Jan. to 15 Mar.
Ixia	2d. a lb. from 1 Feb. to 30 Apr.
Lettuce, endive, chicory (salad)	5s. a cwt. from 1 Jan. to 29 Feb.
Asparagus	1½d. a lb. from 1 Mar. to 15 Apr.

¹ Exchange of Notes, Treaty Series No. 13 (1934), 8 May 1934. Cmd. 4590, 1934.

² Agreement (France No. 1, 1934), 27 June 1934. Cmd. 4632, 1934.

³ See p. 35.

<i>Article</i>	<i>Rate of duty</i>
Cherries, drained or glacé and crystallized or metz . . .	25 per cent. <i>ad valorem</i> in addition to the sugar duty.
Cherries, preserved by chemicals or artificial heat (other than cherries preserved in sugar) .	25 per cent. <i>ad valorem</i> .

Soya cake and oil were included in a list of French goods not entitled to most-favoured-nation treatment upon importation into the United Kingdom.

It was agreed that in the event of any large variation in the rate of currency exchange between the two countries, steps might be taken to correct the disequilibrium by the termination of the agreement at one month's notice.

The agreement is to last until 1 April 1935, but if not denounced, it continues in force subject to notice of termination on the expiry of the next quarter of the year following the quarter in which notice is given. Should the agreement be terminated on 1 April 1935, the seasonal duties mentioned above shall be maintained till the given dates.

5. *Lithuania*

Negotiations with Lithuania for a commercial agreement were initiated early in the year. The Agreement was finally signed in London on 6 July 1934, ratified on 2 August, and came into force on 12 August.¹

During the currency of the agreement United Kingdom goods in Lithuania and Lithuanian goods in the United Kingdom shall enjoy in all respects treatment not less favourable than that enjoyed by goods produced or manufactured in any other foreign country.

It was agreed that the following agricultural goods should not be subject to duties or charges other or higher than those specified:

¹ Agreement, Treaty Series No. 20 (1934), 6 July 1934. Cmd. 4680, 934.

<i>Article</i>	<i>Rate of duty</i>
Butter	15s. per cwt.
Bacon and hams	Free
Eggs in shell:	
not exceeding 14 lb. per qt. hd.	1s. per qt. hd.
over 14 lb. but not exceeding 17 lb.	1s. 6d. per qt. hd.
exceeding 17 lb. per qt. hd.	1s. 9d. per qt. hd.
Alsike clover seed	10 per cent. <i>ad valorem</i>

There was to be no quantitative regulation of imports of bacon and hams and butter into the United Kingdom, except so far as necessary for the effective operation of schemes for the regulation of the marketing of domestic supplies of these products. If regulation is necessary, the United Kingdom Government will take into consideration the position held by Lithuania as a supplier of these products and will make allocations on a basis not less favourable than to any other foreign country. Lithuanian interests are also safeguarded in the event of the increase of foreign allocations during any period. Control of exports shall be entrusted to the Lithuanian Government so long as such control is effective and satisfactory to the United Kingdom Government.

A protocol to the agreement expresses the hope of the United Kingdom Government that such regulation of imports as may be necessary may be effected by voluntary co-operation between the Governments concerned.

The agreement remains in force, subject to certain stipulations, until 31 December 1936. If neither Government has given six months' notice of intention to terminate it on that date, then it shall remain in force until six months' notice has been given and expired.

6. *Germany*

Negotiations for an Exchange Agreement relating to commercial payments were concluded and the agreement, signed

on 10 August 1934, came into force on 20 August 1934.¹ It dealt chiefly with the means of payment for British exports to Germany.

7. *The Netherlands*

Notes were exchanged between the United Kingdom and the Netherlands on 20 July and 30 July 1934.² A full Commercial Agreement could not be concluded, and a temporary arrangement was made by which the United Kingdom guarantees to the Netherlands as from 1 August 1934 her full share of all quotas for any class of goods.

Any portions of quotas allotted to the Netherlands which remain unutilized at the end of any given quota period shall be carried over to the next quota period, but the carrying over shall not be available for longer than yearly periods.

The Government will have due regard to seasonal variation in imports of certain classes of goods when periodically allocating quotas. In order to assure the maintenance of existing channels, preference in the issue of import licences will be given to traders who imported during the basic period and who undertake to continue to import.

These arrangements remain in force until the expiration of three months from the date on which notice to terminate them is given by either Government.

8. *Estonia*

An agreement between the United Kingdom and Estonian Governments was signed on 11 July 1934, ratified on 29 August, and came into force on 8 September.³

The agreement resembles that concluded with Lithuania.

¹ Anglo-German Exchange Agreement, Treaty Series No. 22 (1934), 10 August 1934. Cmd. 4702, 1934.

² Exchange of Notes, Treaty Series No. 23 (1934), 20 July and 30 July 1934. Cmd. 4703, 1934.

³ Trade Agreement, Treaty Series No. 32 (1934), 11 July 1934. Cmd. 4736, 1934.

No duties or charges shall be placed upon butter, bacon and hams, and eggs in shell other or higher than those on the same products in the Lithuanian agreement. In addition, the following products and rates of duty are included:

<i>Article</i>	<i>Rate of duty</i>
Bilberries	Free
Cranberries	10 per cent. <i>ad valorem</i>
Cream in hermetically sealed containers	10 per cent. <i>ad valorem</i>

The same safeguards are given for quantitative regulation of butter and of bacon and hams as were granted to Lithuania. Further, since imports of eggs, potato flour, milk powder, condensed milk, meat and fish conserves, cheese, and poultry from Estonia have been insignificant compared to supplies from other countries, the United Kingdom will, in the event of quantitative regulation being imposed, endeavour to arrange that such products from Estonia shall remain unregulated, provided that such supplies do not increase to an embarrassing extent. Control of exports will be left in the hands of Estonia as long as it is effectual.

The United Kingdom will endeavour to see that regulation of imports will be effected voluntarily. If regulation of butter imports is found necessary, due weight will be given, when allocations are being decided, to the special importance of the butter trade to Estonia, and also to the extent to which it may have been affected by restrictions in other markets.

The agreement remains in force until 31 December 1936, and is continued thereafter subject to the same terms of notice of termination as the Lithuanian agreement.

9. Latvia

The trade agreement with Latvia was signed on 17 July 1934, ratified on 2 October, and came into force on 12 October.¹ In detail it resembles the treaties with Lithuania

¹ Commercial Agreement (Latvia No. 1, 1934), 17 July 1934. Cmd. 4659, 1934.

and Estonia. Similar duties and charges on bacon and hams, butter, eggs in shell, bilberries, cranberries, and alsike clover seed are prescribed, together with like provisions and safeguards for quantitative regulation by the United Kingdom of bacon and hams, butter, cheese, eggs, and poultry as were made for bacon and hams and butter. Treatment no less favourable than that afforded to other countries shall be afforded to Latvia, and control of exports shall be left in the hands of the Latvian Government so long as it is in conformity with the United Kingdom schemes for import regulation.

In a protocol, the Government of the United Kingdom hopes that import regulation may be effected voluntarily, and, in any discussions with foreign supplying countries, will give due consideration to the importance to Latvia of the butter trade and the substantial increase in that trade with the United Kingdom in recent years.

In view of the severe reduction in Latvian exports which would result from the rigorous application of the above conditions, Latvia is to be given, in the event of compulsory regulation, a supplementary allocation which would increase its total allocation to 113,000 cwt., or not more than 3 per cent. of all foreign imports, whichever is the greater, provided that other foreign suppliers raise no objection.

The agreement remains in force, subject to certain conditions, until 31 December 1936, and thereafter until the expiration of six months after notice of termination has been given.

10. *Uruguay*

Members of a Delegation from the Uruguayan Government exchanged views with the President of the Board of Trade upon the terms of a new trade agreement on 4 June 1934,¹ but nothing was concluded during the year.

¹ *Board of Trade Journal*, vol. cxxxii, No. 1957, 7 June 1934.

II. *Poland*

Discussion with a delegation from the Polish Government upon the terms of a new commercial agreement was begun in June, and was still proceeding at the end of the year.

2. The International Wheat Agreement.¹

The International Wheat Agreement was signed on 25 August 1933 by nine exporting and thirteen importing countries.² Its primary objects were to adjust the supply of wheat to effective world demand, to eliminate the abnormal surpluses, and to bring about a rise and stabilization of prices. The agreement set up a Wheat Advisory Committee, of fifteen members, 'to watch over the working and application of this agreement'.

The 1933-4 season's import demand was estimated at 560 million bushels, and quota allocations were accepted by Canada, the United States, Australia, and Argentina, amounting to 462 million bushels. The Danubian countries subdivided their quota of 50 million bushels, Bulgaria obtaining 7.45 million bushels, Hungary 19.55 million bushels, Roumania 11.95 million bushels, and Yugoslavia 11.05 million bushels.

At the second meeting, on 27 November, two sub-committees were appointed, the one to consider market conditions and the other to discuss means of increasing wheat consumption.

A third meeting was held in London on 29 January 1934, to review the situation, receive the reports of the two sub-committees, and review the results to date of the London Agreement.

In spite of large European crops and a consequent reduc-

¹ The following notes have been obtained from *The Times*, *The Miller*, *Corn Trade News*, *Wheat Studies*, and *Foreign Crops and Markets*.

² *The Agricultural Register*, 1933-4, pp. 57-60. The agreement was ratified by all countries except the Irish Free State.

tion in the import demand, the estimate of 560 million bushels as the import demand for August-July 1933-4 was expected to prove approximately correct; if, however, there was to be any liquidation of stocks, a greater increase in trade in the next year was needed. The American delegation reported that plans were made to fulfil their undertaking to reduce their wheat acreage by 15 per cent. from the average acreage in 1931-3. The main discussions appeared to centre on means of controlling and reducing production rather than on increasing consumption.

The fourth meeting was held in Rome on 5 April. A review of the situation showed that the world carry-over at the end of the 1933-4 season would be much the same as at the end of 1932-3. Argentina announced that unexpectedly large yields made it difficult, if not impossible, to adhere to the allocated quota; at the same time it became evident that no measures for production restriction, beyond credit restriction for wheat growers, had been introduced by the Argentine Government, in conformity with the undertakings in the London Agreement.

Agreements were sought along two lines: (1) among all importing countries to reduce the percentage extract of flour from wheat in order to increase wheat consumption, and (2) among exporters not to sell abroad below a certain determined price. Details of plans to raise export prices were submitted to the various Governments and the conference adjourned on 17 April.

The Committee, increased to include representatives of all the countries which ratified the agreement, met again in London on 7 May. It failed to reach agreement on the minimum export price scheme, Argentina being unable for various reasons to consent to the plan, and consequently other countries withdrew their approval. A sub-committee was appointed to consider possible alternative plans for the stabilization and improvement of prices.

Discussions were meantime carried on between the four major exporting countries, Australia, Canada, the United States, and Argentina, over the readjustment of their respective export quotas. The failure of Argentina to keep within the limits of its export quota in 1933-4 and effectively to adopt measures for production control made agreement difficult.

The fifth session of the Conference was held in London on 14 August. The achievements of the first year's working of the agreement were under review. As a result of large European crops and heavy previous carry-over in North America, total world stocks on 1 August 1934 were 1,140 million bushels compared with 1,120 million bushels in August 1933 and an average of 625 million bushels in the seven years 1922-8.

The acreage reductions contemplated in the agreement were not fully attained, though the world acreage sown to wheat, excluding Russia and China, was 13 million acres less in 1934 than in 1933; 85 per cent. of this reduction was due to the action of the larger overseas exporting countries. The efforts to increase consumption had proved disappointing; only France had achieved any real progress, but only by denaturing wheat for animal consumption and reducing the percentage of flour extraction. The Committee estimated that the probable world demand for wheat and flour by importing countries during the crop year August-July 1934-5 would be 600 million bushels, compared with 560 million in 1933-4.

Six amendments, recommended unanimously by the Committee, were submitted for consideration by the various Governments:

1. That the agreement be extended from 31 July 1935 to 31 July 1937.
2. That the acreage reductions secured in 1934 should be maintained in 1935 and 1936.
3. That basic export quotas for the crop years 1935-6 and 1936-7 should be established on a basis that will permit

of their *pro-rata* adjustment in accordance with total world demand as estimated by the Committee.

4. That the 1934-5 export quotas, agreed to in 1933, be readjusted in the light of the available exportable surpluses and demand.
5. That crop-year export quotas be divided into quarterly quotas in accordance with normal seasonal distribution of exports from each country.
6. That a system of quota reserves be established to meet special contingencies, to ensure greater elasticity in working the agreement and for the semi-automatic transfer of quotas from countries with below-normal to countries with above-normal yields per acre.

The actual allocation of quotas for 1934-5 was left for later decision.

After the August meeting it was contended in certain quarters that another summer such as 1934 would cause a large drop in the supply below normal requirements, with consequent scarcity prices. During the first half of November 1934 the price of parcels of wheat imported into the United Kingdom was only 44.6 gold cents per bushel. The aim of the Agreement is to raise this price to 63 gold cents before the quantitative restrictions by importing countries should be relaxed.

A survey of the situation was considered by the Committee at its sixth meeting, held in Budapest on 20 November. The latest information indicated that the total wheat acreage, excluding India and U.S.S.R., was 5.3 per cent. less in 1934 than in 1933, 10.1 per cent. less in the four overseas exporting countries, 1.1 per cent. less in European exporting countries, and 0.15 per cent. more in Danubian countries.

Production in the various groups of countries in 1934 compared with production in previous years is shown in the table on page 44.

The Committee estimated that world stocks on 1 August 1934 were about 1,140 million bushels and it forecast that,

owing to the short crops of 1934, they would be about 785 million bushels on 1 August 1935, a reduction of about 355 million bushels.

It was announced that the importing countries were prepared to continue the agreement, amended as above, for a

Wheat Production in Exporting and Importing Countries

	<i>Four major export- ing countries</i>	<i>Danubian countries</i>	<i>European import- ing countries</i>
	million bushels	million bushels	million bushels
1909-13	1,116	330	939
1922-6	1,524	256	884
1928-32	1,692	324	1,034
1933	1,275	371	1,289
1934	1,150	255	1,150

period of two years, and that the quarterly quotas and the establishment of quota reserves would make the agreement more effective by increasing its flexibility. Hungary and Bulgaria accepted the amendments subject to minor modifications. Basic quotas for the 1934-5 season were left unsettled, and final consideration of quarterly quotas and of quota reserves, both for the present and subsequent years, was postponed. It is said that Argentina is dissatisfied with the present basis of acreage reduction and has taken exception to quarterly quota revision.

Towards the end of the year France announced its intention to abandon its internal minimum price system, which was proving an excessive stimulus to production. France would once more become an importing country, but it would be necessary temporarily to export wheat in order to liquidate part of the existing surplus, estimated at about 80 million bushels. It was hoped to export about 11 million bushels of this amount.

B. QUANTITATIVE REGULATION

Quantitative regulation has been used for the restriction of various imports since the end of 1932; it is, indeed, one of

the most important instruments in the Government's agricultural policy. The principles were first laid down officially at the Imperial Economic Conference at Ottawa in July 1932, though the policy was foreshadowed in the terms of reference for the Reorganization Commission for Pigs and Pig Products, which was invited 'to investigate the manner in which its operation (i.e. a marketing scheme) could be facilitated by the quantitative regulation of imports of pigs and bacon and by similar or different measures affecting other pig products'.

Regulation has been accomplished under voluntary agreements and also under the provisions of the Ottawa Agreements Act, 1932, and the Agricultural Marketing Act, 1933; the products affected now include chilled beef, frozen beef, live cattle, frozen mutton and lamb, bacon and hams, condensed whole milk, condensed skimmed milk, milk powder, cream, main-crop and early potatoes, eggs, and oats.¹

I. Chilled Beef

A 10 per cent. voluntary reduction in marketings of chilled beef during November and December 1932 was made by foreign supplying countries. Under the Ottawa Agreements Act imports from foreign sources were limited, by quarters until June 1934, to the levels prevailing during the corresponding quarters of the standard 'Ottawa Year', 1 July 1931 to 30 June 1932. Arrangements were made, however, for further voluntary reductions, with variations, throughout 1933 and 1934. The reductions which were aimed at are shown in the table on p. 46.

Most of the chilled beef imports come from Argentina, and the provisions of the Argentine Trade Agreement require that imports from Argentina shall not be reduced below the quantity imported in the corresponding quarter of the Ottawa

¹ Notes on the various proposals for quantitative regulation have appeared in the *Journal of the Ministry of Agriculture*, the weekly farming papers, and the daily press throughout 1934.

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

Quantitative Reductions in Chilled and Frozen Beef and Frozen Mutton and Lamb Imports from Foreign Sources, 1933 and 1934

Quarter	Maximum permitted import expressed as a percentage of imports in the corresponding period of the 'Ottawa Year'.		
	Chilled beef	Frozen beef	Frozen mutton and lamb
1933 First . . .	90	90	90
Second . . .	98	85	85
Third 1st half .	90	80	80
2nd half . . .	87½	80	80
Fourth . . .	85	75	75
1934 First . . .	90	70	70
Second . . .	96½	65	65
Third 1st half .	90	65	65
2nd half . . .	85½	65	65
Fourth . . .	88½	65	65

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 neutralizing the desired effect on prices. If it should be necessary to reduce imports of chilled beef from Argentina in any year by more than 10 per cent. below the quantity imported during the Ottawa Year, it is provided that imports from all the Dominions should be reduced by the same percentage. The Argentine Trade Agreement remains in force for a minimum period of three years from November 1933.

Imports from foreign sources in the Ottawa Year totalled

8,845,000 cwt.; in 1933 and 1934 they were 8,030,000 cwt. and 8,012,000 cwt., reductions below the Ottawa Year of 9.2 per cent. and 9.4 per cent. respectively. There were no Empire supplies in the Ottawa Year; in 1933 they totalled 142,000 cwt., and in 1934 238,000 cwt.¹

2. Frozen Beef

Regulation of supplies started with the reduction of foreign imports under the Ottawa Agreements Act in January 1933. The Australian Government undertook, at Ottawa, to use their best endeavours to ensure that shipments of frozen beef to the United Kingdom in 1933 would not exceed 1,242,000 cwt., 110 per cent. of shipments in the Ottawa Year. The New Zealand Government estimated that shipments from that country in the season 1932-3 would not exceed 440,000 cwt., which also was approximately 10 per cent. greater than the consignments in the Ottawa Year. Foreign supplying countries were subjected to successive quarterly reductions as given in the previous table.

Empire supplies. Australia and New Zealand supplies totalled about 1,529,000 cwt. in the Ottawa Year. Owing to a large increase in New Zealand shipments, total supplies from the two Dominions rose to 1,871,000 cwt. in 1933, and to 2,503,000 cwt. in 1934.

Foreign supplies. During 1933 and 1934 foreign supplies were to be reduced according to the cuts given in the previous table. In 1934 the reductions in the first and second quarters of the year were to be 30 per cent. and 35 per cent. from the Ottawa Year level; arrangements were subsequently made to continue the 35 per cent. reduction during the third and fourth quarters.

The arrangements under the Ottawa Agreements covered carcasses and boned beef and veal, but did not include frozen beef classified as 'Other descriptions'. The intended

¹ See also p. 225.

reductions in the former were practically achieved, but imports of 'other descriptions' increased very considerably until it was arranged in June 1933 that these should be included in the regulated classes.

Total foreign supplies of these categories of frozen beef and veal in the Ottawa Year amounted to about 976,000 cwt.; in 1933 they totalled 990,000 cwt. In 1934 they totalled 810,000 cwt., a reduction of 17 per cent. from the Ottawa level.

Tinned and Canned. Arrangements were made with the importers of foreign canned beef (other than tongues) in 1934, to keep such imports approximately within the limits of the preceding year.¹

3. Live Cattle

Imports from the Irish Free State of certain classes of live cattle, i.e. fat cattle, store cattle, bulls showing permanent incisor teeth and dry cows, became subject to regulation on 1 January 1934.² The issue of import licences for fat cattle was restricted during each quarter of 1934 to 50 per cent. of the imports during the corresponding quarter of 1933. The issue of licences for the other two classes of cattle during each quarter of 1934 was limited to the numbers imported in the corresponding quarters of 1933.

Fat cattle imports were reduced from 222,528 in 1933 to 107,936 in 1934; store cattle from 317,960 to 314,242, and bulls and dry cows from 13,934 to 13,592.

An agreement was reached in January 1935 whereby the quota for fat cattle was raised from 50 per cent. to 66⅔ per cent. of the numbers imported in 1933. The basis of the restriction for the other two classes of cattle was changed from the numbers in 1933 to the average numbers in 1930-2, which will mean an increase of about one-third on the present number. It has been estimated that fat cattle imports may

¹ See also p. 50.

² Cattle (Import Regulation) Order, 1933. S.R. and O. No. 1165, 1933.

increase roughly from 111,000 to 148,000, dairy cattle and bulls from 14,000 to 19,000, and store cattle from 318,000 to 424,000, a total increase of 148,000 cattle.¹

The duties on live cattle imports under the Irish Free State (Special Duties) Act are being maintained.²

Arrangements were also made with Canada, the other important source of live cattle imports, voluntarily to regulate supplies. Shipments during the first six months of 1934 were to be limited to 23,500 head compared with 20,200 head in the first half of 1933. Actual imports in the first six months totalled 23,100 head. During the second half of the year, shipments were not expected to exceed 29,000 head compared with 31,200 in the second half of 1933, but actual imports were 28,200 head.

4. Frozen Mutton and Lamb

During November and December 1932, South American shippers agreed voluntarily to reduce their market supplies by 20 per cent. from the amount previously arranged; the Australian and New Zealand Governments agreed to reduce their shipments by 10 per cent. compared with November and December 1931. Subsequently, supplies were regulated in conformity with the Ottawa Agreements.

Empire supplies. For 1933, Australia and New Zealand estimated that their shipments would not exceed the shipments in the Ottawa Year. Australia gave no indication of the probable 1934 shipments, while New Zealand estimated her exports for the season 1932-3 at 4,000,000 cwt. with a 5 per cent. increase in each of the following two years. Imports in the Ottawa Year totalled 5,397,000 cwt.; in 1933, they fell short of this figure by 356,000 cwt., or 6.6 per cent. In 1934, shipments amounted to 5,182,000 cwt., a reduction of 4.0 per cent. from the Ottawa Year.

¹ *The Farmers' Weekly*, vol. ii, no. 2, 11 January, 1935.

² *The Agricultural Register*, 1933-4.

Foreign supplies. Supplies from foreign countries were to be subjected during 1933 and the first half of 1934 to the successive quarterly reductions given in the previous table. During the first two quarters of 1934, the reductions were 30 per cent. and 35 per cent. from the corresponding quarters of the Ottawa Year. In accordance with the Ottawa Agreements a continuance of the 35 per cent. reduction was arranged for the second half of 1934.

Foreign imports in the Ottawa Year totalled 1,935,000 cwt.; the actual imports in 1933 were 1,610,000 cwt., a reduction of 20 per cent.; and in 1934, 1,297,000 cwt., a decline of 33 per cent. from the Ottawa Year level.¹

Subsequent arrangements for January-March, 1935.

Arrangements have been made for the continuation of quantitative regulation during the first quarter of 1935.

Foreign chilled beef imports will be maintained at 90 per cent. of the quantities imported in the first quarter of 1932, while frozen carcasses and boned beef and frozen mutton and

Empire Imports of Dead Meat Arranged for the First Quarter of 1935

	<i>Beef and veal</i>	<i>Mutton and lamb</i>	<i>Pork²</i>
	000 cwt.	000 cwt.	000 cwt.
Australia	187·00 ³	450	16·7
New Zealand	160·00	800	75·0
Canada	19·25	..	8·6
Union of South Africa	17·00	..	..
Southern Rhodesia	51·00	..	..
Total	434·25	1,250	100·3

¹ See also p. 231.

² Figures for frozen pork are exclusive of pork for curing in this country, supplies of which are dealt with under bacon regulation. •

³ Not more than 30,000 cwt. to be chilled.

lamb remain at 65 per cent. of the imports in the first quarter of 1932.

Imports of foreign frozen pork are to be reduced to the average level in the first quarters of the three years 1932, 1933, and 1934, approximately 65,000 cwt.; and all foreign imports of canned beef are to be reduced to one-fourth of that imported in the corresponding quarter of 1933.

Agreement was also reached with overseas Empire countries to limit supplies to levels based on the average quantities imported in the first quarters of 1932, 1933, and 1934.

5. Bacon and Hams

Quantitative regulation of bacon and hams was started on 23 November 1932, after the publication of the report of the Reorganization Commission for Pigs and Pig Products. Voluntary agreements were made with the eleven principal foreign supplying countries for a 15 per cent. reduction for the three months starting on 23 November 1932. Further reductions were made voluntarily during 1933 until 10 November, when a reduction of 16 per cent. in foreign supplies was effected by an Order under the Agricultural Marketing Act, 1933.¹ Allocations totalling 1,979,330 cwt. were made to foreign countries for the period 10 November 1933 to 28 February 1934.² Total Dominion supplies during these four months were estimated to be at the rate of 1,377,000 cwt. a year.

The second contract period was for 10 months, March to December 1934. The volume of home contracts was not, however, known in time to fix foreign allocations, and it was arranged that, subject to adjustment when home-production was ascertained, imports from foreign countries should continue during the first 28 days of March at the average four weekly rate in operation during the former quota period.

¹ The Bacon (Import Regulation) Order, 1933. S.R. and O. No. 1050, 1933.

² *The Agricultural Register*, 1933-4, p. 125.

The United Kingdom bacon output for the second contract period was estimated at 2,253,330 cwt., and Empire imports were expected to amount to 1,340,400 cwt. of bacon. The balance of 5,433,300 cwt., including 13,000 cwt. of frozen

Foreign Bacon Import Quotas, March-December, 1934

	<i>March-July</i>	<i>August-December</i>
	cwt.	cwt.
Denmark . . .	1,824,120	1,596,010
Holland . . .	259,525	238,770
Poland . . .	223,525	199,815
Sweden . . .	126,880	118,130
Lithuania . . .	88,880	74,145
Estonia . . .	20,950	18,850
Finland . . .	11,435	10,055
Latvia . . .	17,920	17,595
U.S.S.R. . . .	21,325	21,365
Argentina . . .	19,115	17,595
U.S.A. . . .	209,225	201,070
Others . . .	40,000	44,000
Total . . .	2,862,900	2,557,400

pork for curing, was allocated to foreign countries. Owing to seasonal variation in the home-output, allocations to foreign countries were made at a higher rate for the first five months than for the second five months. The above figures give the individual quotas, subject to certain provisions and tolerances.¹

Total net foreign imports for these ten months amounted to 5,782,000 cwt. instead of 5,420,300 cwt. Part of the excess of 6 per cent. was due to imports from a number of countries which were not scheduled in the Order, having previously sent only insignificant quantities of bacon to the British market. Provision was made to meet this difficulty.² Excess shipments from the main exporting countries must be offset

¹ *Journal of the Ministry of Agriculture*, vol. xli, no. 2, May 1934.

² See p. 354.

as early as practicable in the next allocation period. Compared with the imports in the ten months March to December 1932, there was a reduction of 41 per cent.

Foreign import quotas for the first four months of 1935 have been allocated as follows, subject to certain allowances and deductions:¹

Foreign Bacon Import Quotas, Jan.-Apr., 1935

Country	January-April allocation	
	per cent.	cwt.
Denmark	63.5	1,250,394
Netherlands	8.9	175,098
Poland	7.4	146,530
Sweden	4.4	86,628
Lithuania	2.7	54,373
Estonia	0.7	13,823
Finland	0.4	7,372
Latvia	0.7	12,902
U.S.S.R.	0.8	15,667
Argentina	0.7	12,902
U.S.A.	7.5	147,451
Other foreign countries	2.3	44,593
Total	100.00	1,967,733

No allocations had been made by March for the remaining part of the third contract period, May-December. The allocated total of 1,967,733 cwt. compares with gross imports of 2,286,638 cwt. in the corresponding four months of 1934, a reduction of 318,905 cwt. or 14 per cent.

6. Processed Milk

Arrangements were made for the quantitative regulation of imports of processed milk as from June 1933;² these were made voluntarily. The principal foreign supplying countries were asked to limit their shipments to certain percentages, varying with the type of product, of their shipments in the

¹ *Journal of the Ministry of Agriculture*, vol. xli, no. 11, February 1935.

² *The Agricultural Register*, 1933-4, p. 145.

corresponding period of the year June 1932 to May 1933. These percentages are given in the accompanying table.

Quantitative Reductions in Processed Milk Imports from the Principal Foreign Supplying Countries, June-December, 1933 and 1934

		<i>Agreed imports expressed as a percentage of the imports in the corresponding period of the year June 1932 to May 1933</i>			
		<i>Condensed whole milk</i>	<i>Condensed separated milk</i>	<i>Milk powder</i>	<i>Cream</i>
1933	June-November	80	80	80	80
	December		85		
1934	January	80	82½	80	80
	February		80		77½
	March		77½		75
	April-June		80 ¹		77½	80^{1}	70
	July-August	80	77½	80	66½
	September	70	77½	75	66½
	October-December	70	70	75	65

¹ On a monthly basis.

Less important foreign supplying countries and Empire countries, excluding the Irish Free State, were asked to cooperate on a 'stand-still' basis; shipments for June-December 1933 and for 1934 were not to exceed the level attained in the corresponding periods of the basic year, June 1932 to May 1933.

Imports from the Irish Free State were regulated from the beginning of the year 1934. Supplies of cream were to be limited to 15,000 cwt. in the first six months of 1934, a reduction of 8 per cent. from the 16,343 cwt. shipped in the first six months of 1933. Condensed milk shipments were to be subject to a reduction of 10 per cent. and 12½ per cent. in the first two quarters of 1934 compared with the first two quarters of 1933. Arrangements were also made to continue

the reductions during July and September. The reductions proposed for the fourth quarter were 15 per cent. for condensed milk and 17½ per cent. for cream from the shipments in the last quarter of 1933.

Changes in the Imports of Processed Milk and Cream, between June 1932–May 1933 and 1934

	Foreign			Empire		
	Basic year	1934	Per cent. change	Basic year	1934	Per cent. change
	000 cwt.	000 cwt.		000 cwt.	000 cwt.	
Condensed skimmed milk	2,066	1,560	-24.5	71	68	-3.4
Condensed whole milk .	430	322	-25.1	171	143	-16.3
Milk powder .	126	77	-39.0	171	176	+2.9
Cream .	66	46	-31.0	52	39	-24.2

Total imports of condensed whole milk, condensed separated milk, milk powder (unsweetened), and cream for the basic year and for 1934 are given in the accompanying table.

7. Butter and Cheese

Early in 1933, the British Government put forward proposals for a voluntary quantitative limitation of exports of dairy products from New Zealand and Australia, which would enable this country, under the terms of its Trade Agreements with a number of foreign countries, compulsorily to limit butter imports from foreign sources. The Dominions were unwilling to agree, and in September 1933 Mr. Baxter, Chairman of the Milk Marketing Board, visited New Zealand. He requested, in particular, on behalf of the British farmers, and with the consent of the British Minister of Agriculture, that the annual export of cheese should be limited, until a

further agreement was made, to the amount sent during the 1932-3 season, less 10,000 tons.¹

The New Zealand Dairy Produce Control Board, with the approval of the New Zealand Government, could not agree to this policy, on the grounds that it would penalize New Zealand alone; that New Zealand cheese exports to Great Britain had not increased materially since 1925; that it would involve a large increase of butter exports; and that it was impracticable unless the restriction of all dairy products and their substitutes, including margarine, was also brought under review. But in March 1934, the Secretary of State for the Dominions cabled that, as a result of the subsidy granted in Great Britain to manufactured milk,² the urgency for supply restriction had been removed.³

In New Zealand, the dairy industry regarded the matter as closed. The New Zealand Government, however, felt that action was still needed to increase prices overseas, and brought pressure to bear on the Dairy Produce Control Board. Finally the Board agreed, by a small majority, that if no alternative method could be found to improve next season's price level, it must agree to quantitative restriction¹. Up to the end of 1934, however, no limitation of exports was enforced.

8. Eggs

Foreign Governments and the Irish Free State were asked to limit their supplies of eggs in shell, during the six months 15 March to 14 September, to the amounts shipped in the corresponding period of 1933. The response was, on the whole, satisfactory, and the standstill agreement was continued until the end of September. Total imports from all

¹ *Tenth Annual Report of the New Zealand Dairy Produce Control Board, 1934.*

² See p. 192.

³ *Dairy Produce: Telegraphic Correspondence between His Majesty's Government in the United Kingdom and His Majesty's Government in New Zealand with regard to Quantitative Regulation.* Cmd. 4557, 1934.

sources were slightly less than in the corresponding period of 1933. Arrangements were subsequently proposed to effect a 5 per cent. reduction for the last quarter of 1934 compared with the corresponding quarter of 1933. Foreign Govern-

*Imports of Eggs in Shell, 15 March-30 September,
1933 and 1934*

	1933 <i>gt. hundreds</i>	1934 <i>gt. hundreds</i>
Foreign	7,471,266	7,571,348
Irish Free State	2,654,237	2,478,172
Other Empire	216,244	158,046
Total	10,341,747	10,207,566

ments were also informed that a 10 per cent. cut was desired for the first quarter of 1935.

Arrangements were also to be made to secure a reduction of imports from the Irish Free State, amounting to 2½ per cent. in the last quarter of 1934 and 5 per cent. in the first quarter of 1935.

9. Potatoes

(i) *Voluntary Arrangements*

a. Main crop.

Quantitative regulation of potato imports was first started in the autumn of 1933 when the home crop was practically sufficient to meet all requirements. Voluntary arrangements for the importation of limited supplies were made specifically with the Netherlands, Belgium, and the Irish Free State, normally the main sources of imports, and other countries were asked to refrain for the time being from sending potatoes to the United Kingdom market.

Foreign supplies. The Netherlands agreed to limit their shipments from September to December 1933 to 8,000 tons; this arrangement was continued for the four months January

to April, 1934 with a further allocation of 8,000 tons. For May and June the allocation was placed at 2,000 tons. The actual shipments for these ten months totalled 10,606 tons, 59 per cent. of the authorized maximum of 18,000 tons. Subsequently the Netherlands were asked to limit supplies in September and October 1934 to 3,000 tons.

Belgium was requested to limit shipments to 270 tons for the 1933-4 season, but the actual supplies totalled only 58 tons. The allocation for September and October, 1934, was 60 tons.

Empire supplies. Exports from the Irish Free State were to be limited, subject to certain exclusions, to 4,500 tons for September to December, 1933. During the four months January to April, imports were to be restricted to 3,800 tons and for May and June to 1,200 tons. The maximum permitted imports for the ten months September 1933 to June 1934 were therefore 9,500 tons, but actual imports were only 6,017 tons. The allocation for September and October 1934 was 1,000 tons.

An agreement was arranged between the Potato Marketing Board and officials of the Northern Ireland Ministry of Agriculture, the Ulster Farmers' Union, and the Merchants' Federation, that Northern Ireland would not ship to Great Britain more than 200,000 tons in each of the seasons 1933-4 and 1934-5. Actual imports in 1933-4 totalled 137,000 tons, while shipments in the 1934-5 season up to 1 December were 5,000 tons less than in the corresponding period of 1933-4.

b. Earlies.

In 1934, foreign countries were asked to limit their shipments of early potatoes to the 1933 level, about 95,000 tons, which was less than half the average in the previous six years, but imports from these countries totalled only about 78,000 tons, or 18 per cent. below the permitted maximum.

There were unofficial negotiations between the Potato

Marketing Board and representatives of Spanish potato interests, as a result of which the Spanish export season closed earlier than usual.

In April, the Potato Marketing Board discussed, with the States of Jersey Agricultural Committee, the question of *Voluntary Limitation of Foreign Early Potato Imports, 1934*

	<i>January-April</i>	<i>May-August</i>	<i>January-August</i>
	tons	tons	tons
Spain	9,333	66,106	75,439
Canary Islands	2,667	1,346	4,013
Netherlands . . . . .	..	12,320	12,320
Belgium . . . . .	..	1,351	1,351
Other countries . . . . .	..	200	200
Total	12,000	81,323	93,323

getting Jersey potatoes off the market before English earlys were available in any quantity. Co-operation was achieved and the bulk of the Jersey potatoes were marketed well before 30 June, the closing date desired by the Board. Jersey producers will in future endeavour to market their potatoes in Great Britain before the end of June.

(ii) *Statutory Regulation*

An Order¹ issued by the Board of Trade under the Agricultural Marketing Act, 1933, prohibits as from 8 November 1934, all imports of potatoes from the Irish Free State and foreign countries except under licence.

10. Oats

The Government of Canada agreed to use their best endeavours to limit exports of oats and oat products to this country for the year August 1933 to July 1934. Exports of oats to the United Kingdom were not to exceed the average of the last two cereal years, and of oat products the average

¹ Potato (Import Regulation) Order, 1934, S. R. and O., No. 1160, 1934.

of the last two calendar years. Oat imports from Canada decreased from an average of 2,037,419 cwt. in the two years 1931-2 and 1932-3 to 1,266,368 cwt. in 1933-4, a decrease of 38 per cent. Imports of oat products including oatmeal were also reduced.

The agreement was maintained for the cereal year August 1934 to July 1935, oat imports from Canada being limited to not more than 2,000,000 cwt., and oat products to not more than 570,000 cwt.

IV. ADMINISTRATIVE ACTION

A. GENERAL

Marketing Schemes under the Agricultural Marketing Acts, 1931 and 1933, may be drawn up and submitted to the Minister of Agriculture by producers, or prepared by others, such as Reorganization Commissions appointed by the Minister, for consideration by producers who may then submit them. Schemes may apply to any agricultural product or to a product derived from an agricultural product for which there is a Marketing Scheme.

After submission, an inquiry is held into any objections which are raised to the Scheme; it is then laid before Parliament, with or without modifications by the Minister; if approved, an Order is issued and the date on which the Scheme will come into force is specified. A poll of registered producers is then held to determine whether it shall remain in force.¹

Similar measures apply to Northern Ireland.

Up to the end of 1933, seven Marketing Schemes were in operation and the necessary administrative bodies established, five in Great Britain and two in Northern Ireland. One in Scotland, for raspberries, had been approved by Parliament but rejected by producers.

During 1934, four further Schemes came into operation, one for potatoes in Great Britain and three for milk, one in Northern Ireland, another in Aberdeen and district, and the third in the North of Scotland.

Seven further Schemes have been submitted, or are in preparation for submission: milk in Moray and Banff and in Argyllshire; sugar and sugar beet in Great Britain; raspberries in Scotland; live stock in England and Wales; and fruit in England and Wales.

¹ *The Agricultural Register*, 1933-4, pp. 11-13.

Reports by Reorganization Commissions were issued in 1934 for the marketing of fat stock in England and Wales and in Scotland; and in February 1935, for poultry and eggs in England and Wales and in Scotland. Further Commissions

<i>Product</i>	<i>Area of Scheme</i>	<i>Date on which the principal provisions were brought into operation</i>
Hops	England and Wales	6 Sept. 1932
Pigs	Great Britain	9 Sept. 1933
Bacon	Great Britain	9 Sept. 1933
Pigs	Northern Ireland	1 Oct. 1933
Bacon	Northern Ireland	1 Oct. 1933
Milk	England and Wales	6 Oct. 1933
Milk	Scotland (South of the Grampians)	1 Dec. 1933
Potatoes	Great Britain	9 Mar. 1934
Milk	Aberdeen and District	1 Aug. 1934
Milk	Northern Ireland	16 Aug. 1934
Milk	North of Scotland	1 Oct. 1934

for milk and for poultry and egg marketing in Great Britain were appointed in February 1935.

Various administrative bodies have been established whose functions affect either directly or indirectly the present agricultural reorganization. The Food Council reported on one commodity during 1934, but its duties appear to have been taken over to a great extent by the Consumers' Committees. The Import Duties Advisory Committee established under the Import Duties Act, 1932, has recommended additional duties during the year on certain agricultural products and has considered applications concerning others.

Ten Committees have been established under the Agricultural Marketing Acts: three Consumers' Committees; three Committees of Investigation; a Market Supply Committee and three Marketing Facilities Committees. Three *ad hoc* committees were established or reported during the year, a Provisional Hops Committee, a Bacon Loan In-

demnity Committee, and a Committee on Abattoir Design. A Cattle Committee was established to administer the Cattle Industry (Emergency Provisions) Act, 1934.

A number of other committees, details of which are not included in the following section, have been established by the Ministry of Agriculture or the Board of Trade to act in various advisory capacities.

B. SCHEMES AND BOARDS

I. Milk

Five marketing schemes are now in operation in the United Kingdom, one in England and Wales, three in Scotland, and one in Northern Ireland, while two more are in process of formation in Scotland:

- The Milk Marketing Scheme, England and Wales,
- The Scottish Milk Marketing Scheme,
- The Aberdeen and District Milk Marketing Scheme,
- The North of Scotland Milk Marketing Scheme,
- The Northern Ireland Milk Marketing Scheme,
- The Moray and Banff Milk Marketing Scheme,
- The Argyllshire Milk Marketing Scheme.

Their administration is entirely independent of each other and, though the schemes are similar in many ways, there are several important differences. The actions and experiences of these Boards must be of more than local significance. Added interest is given by the decision of the Minister of Agriculture and the Secretary of State for Scotland to appoint a Reorganization Commission to examine the schemes in existence and consider the possibilities of further reorganization, and possibly of consolidation.¹

The most important differences lie in the methods of electing members of the Boards, the ways of determining prices, the range of prices fixed and the degree of control of

¹ See p. 113.

distributors' margins, the methods of distributing returns, and the classes of producers exempt, or partly exempt, from the schemes.

All schemes except that of Northern Ireland are administered by Boards elected by registered producers. Elections are direct except for the Scottish Scheme, where producers elect a Selection Committee to choose the Board, and the Aberdeen and District Scheme, where part of the Board is composed of the Directors of the Aberdeen and District Milk Agency, Ltd. The Northern Ireland Scheme is administered by the Ministry of Agriculture for Northern Ireland, assisted in its price-fixing functions by a Joint Milk Council on which sit elected representatives of producers.

Except for the Argyll Milk Marketing Scheme, which exempts sales of liquid milk and does not fix prices, but is designed solely to obtain the Government subsidy on milk manufactured, and except for the Northern Ireland Scheme, prices are fixed by the Boards. It is provided in all the schemes that distributors must be consulted. In the first year of the English Scheme, prices were to be determined, if producers and distributors failed to agree, by three arbitrators appointed by the Minister of Agriculture. The Scottish Board, if they cannot agree with distributors on any or all of the prices which they fix, may call in a consultant. In Northern Ireland, prices are determined, subject to the approval of the Ministry of Agriculture, by a Joint Milk Council composed of representatives of the Ministry and of producers, consumers, and distributors.

While all Boards have the same powers to fix prices, the English Board originally confined itself to establishing wholesale prices for ordinary milk. In the second contract period semi-wholesale prices and minimum retail prices were also fixed, and in the third, semi-retail prices. The Scottish Boards and the Northern Ireland Joint Milk Council have fixed prices at all stages from producer to consumer for both

ordinary, Grade A, and Certified milk, and have also established, or intend to establish, fixed haulage charges.

All the Boards, except in Argyll and Northern Ireland, fix prices varying according to the uses to which the milk is to be put, those for milk sold for liquid consumption being higher than those for milk manufactured. In England and Wales, the returns from the sale of milk are pooled in each of eleven regions; some adjustments are made from pool to pool, so as to secure a nearer approach to equality in the average returns in the different regions, and the amounts received are then divided equally amongst the producers in each region in proportion to their sales of milk. In the Scottish Scheme all returns throughout the area are pooled and, until the end of 1934, the pool was divided equally amongst all producers; from that date, however, producers of level supplies throughout the year are to receive a bonus. In the Aberdeen and the North of Scotland districts, producers receive the liquid price for a basic quantity related to their production in the winter, and a surplus price, decreased by the lower returns for milk sold for manufacture, for any supplies in excess of this quantity. The Northern Ireland Scheme differs substantially from the others; it does not involve pooling, but provides for payment to producers according to the grade of milk which each supplies, and some compensation to producers of milk suitable for liquid consumption for which a liquid outlet cannot be found, and which is sold to creameries.

All schemes permit the exemption of very small producers, though the dividing lines are somewhat different. In addition, producers of Certified and Grade A (T.T.) milk are not included in the English Scheme, though they are in the others. The schemes differ, also, in the methods of assessing the levies on producer-retailers, some charging according to the number of cows and some according to the amount of milk sold. Further, producer-retailers are, in some schemes,

treated like producer-wholesalers, and in some like farmers selling to wholesalers. These differences, though matters of detail, have caused a good deal of friction.

*The Milk Marketing Scheme, England and Wales*¹

The Milk Marketing Scheme, which established a Milk Marketing Board for England and Wales, covers all milk sold in liquid form, with the exception of wholesale sales by persons owning not more than four milk cows and sales of Certified and Grade A (T.T.) milk.² All sales, except those by producer-retailers, must be made through the Board, which sells the milk at prices varying according to the different uses to which it is put, a higher price for milk sold for liquid consumption and lower prices for manufacturing milk. The returns for the milk in each of the eleven regions into which the area of the Scheme is divided are pooled. Producer-retailers contribute to the pool by a levy based on the difference between the price received for liquid milk and the pool price in their particular region. A levy not exceeding 1d. per gallon is made on all milk sold for liquid consumption in each pool, to form an Inter-Regional Compensation Fund. There are wide differences between some of the pools in the proportions of milk sold at liquid prices and at manufacturing prices, and the contents of this Fund are distributed to the regional pools in proportion to the amount of milk manufactured in each, in order to bring the regional pool prices more into line with one another. The expenses of operating the Scheme are deducted, and the balance of the pool is divided among producers in each region proportionately to the gallonage supplied by each. In addition, each producer's account is debited with the amount of transport charges payable to his purchaser and credited with any level delivery

¹ The Milk Marketing Scheme (Approval) Order, 1933, S.R. and O., 1933, No. 789.

² See also p. 79.

premium or special service premiums for which he may have qualified.

The Scheme came into full operation on 6 October 1933. The provisional Board, consisting of sixteen persons nominated in the Scheme, and two persons, Lord Lymington and Mr. Hely-Hutchinson, nominated by the Minister, held office until 30 June 1934. At the beginning of June, elections were held in the eleven regions for the twelve district members, the North-Western having two, to serve on the new Board. At the Annual General Meeting held on 8 June 1934 and attended by about 400 producers out of a total of some 150,000, three special members were elected, Mr. Baxter, Mr. Trehane, and Mr. Goodwin. After consultation with the Market Supply Committee the Board co-opted Mr. Hely-Hutchinson and Lord Cranworth as members. Mr. Baxter was re-elected Chairman, and Mr. Hinds, Vice-Chairman. Remuneration was fixed at £1,200 for the Chairman, £700 for the Vice-Chairman, and £350 for other members of the Board.

So far, the Board has been concerned with the negotiation of three contracts, the first covering 6 October 1933 to 31 March 1934; the second 1 April to 30 September 1934; and the third 1 October 1934 to 30 September 1935.

First Contract Period, 6 October 1933 to 31 March 1934.

The Scheme provided that in its first year the Board should not determine prices except by agreement with the buyers' representatives. No agreement could be reached, and fixation of prices for the six months was left to three independent persons appointed by the Minister. The prices to be paid by buyers for liquid and manufacturing milk were as shown in the table on p. 68.

Owing to the possibility of substituting one milk product for another the Board found it increasingly difficult to maintain wide differences between the manufacturing prices.

Producers who contracted to deliver daily quantities of milk varying by not more than 5 per cent. or 10 per cent. from a stated amount received a premium of 1*d.* and $\frac{1}{2}$ *d.* per gallon respectively. Producer-retailers who sold no milk

Prices per gallon under the Milk Marketing Scheme for the Contract Period October 1933 to March 1934

	1933			1934			Average
	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	
<i>Liquid prices:</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>
In SE. region	16	16	17	17	16	14	15·98
In other regions	15	16	16	16	16	14	15·50
<i>Manufacturing prices:</i>							
For fresh cream	9	9	9	9	9	7½	8·68
„ tinned cream	6	6	6	6	6	5	5·67
„ chocolate	8	8	8	8	8	8	8
„ condensed milk and milk powder	6	6	6	6	6	6	6
„ cheese, butter, and condensed milk for export*	4½	4	3½	3½	3½	3½	3·51
„ other products	9	9	9	9	9	9	9
Weighted average price	5·6	5·4	5·9	5·3	5·1	4·8	5·27

* The price charged equalled the average price per lb. for the previous month of finest white Canadian and finest white New Zealand cheese, less 1½*d.*

wholesale, and thus had little or no 'surplus' on the market, were entitled to the level delivery premium of 1*d.*

Buyers who received milk for liquid sale at milk depots were allowed $\frac{1}{2}$ *d.* per gallon as an allowance for transit risk, as well as the actual rail charge to the point of sale. From October to February, 85 per cent. of the monthly Inter-Regional Compensation Fund, obtained by a levy of 1*d.* per gallon on all milk sold for liquid consumption, was used to raise the pool price in those regions with a high proportion of manufacturing milk, and the remaining 15 per cent. was

accumulated for distribution in the season of maximum surplus. In March the whole of the month's Fund was distributed.

In the first contract period retail prices were not fixed, but it was laid down that no person could retail milk below 'the prevailing retail price for the district'. The phrase was ambiguous and the provision was found difficult to enforce. It led generally to an increase in retail prices.

The total amount of milk sold under contract in the first six months of the Scheme was 374,267,039 gallons. Of this, 318,418,316 gallons were sold under wholesale contract and 55,848,723 gallons by producer-retailers.¹ About 80 per cent. of the milk sold wholesale went to the liquid milk market and about 20 per cent. was manufactured, the latter proportion varying from 16 per cent. in October to 26 per cent. in March.

The proportion of manufacturing milk varied greatly in the different regions and, to a certain extent, from month to month. In the South-Eastern and Eastern regions the percentages were so low as 2.36 and 6.06 per cent. respectively in the six months; in the West-Midland and Far-Western regions the percentages were so high as 34.92 and 37.09 per cent.¹

The 63,268,962 gallons of manufacturing milk were used mainly for cheese, butter, and fresh cream; 30 per cent. was made into cheese, 22 per cent. into butter, 20 per cent. into fresh cream, 18 per cent. into condensed milk, and the remaining 10 per cent. into milk powder, tinned cream, &c.¹

In each month, $\frac{1}{4}d.$ per gallon was deducted for expenses and reserves. The pool prices, which are the prices the farmer would get, plus transport charges and excluding any special premiums, varied from month to month and in the different regions.¹ They were highest in the South-Eastern region, where they varied from $15\frac{1}{4}d.$ per gallon in December

¹ See Appendix, pp. 378-81.

and January to $12\frac{1}{2}d.$ in March; and lowest in the West-Midland at $14d.$ in December and $11\frac{1}{4}d.$ in March. The unweighted average of all pools was $13.55d.$ in October, rising to $14.34d.$ in December and then falling to $12.02d.$ in March.

During the six months, 18 per cent. of the liquid milk sales were made by producer-retailers. Their levy varied from $1d.$ per gallon in the Eastern and South-Eastern region in October to so high as $2\frac{1}{2}d.$ in the Mid-Western and Far-Western regions in February, and the average for the six months and in all the pools was about $1\frac{3}{4}d.$ per gallon. Deducting their level delivery premium, their actual contribution averaged rather over $\frac{3}{4}d.$ per gallon.

Second Contract Period, 1 April to 30 September 1934.

The Board and the distributors were once again unable to agree on price terms for the second contract period, and the appointed arbitrators were again brought in. The price arrangements were as shown in the table on p. 71.

During May the distributors paid a levy of $\frac{1}{8}d.$ per gallon to a Publicity Fund, to which producers paid the same. Semi-wholesale prices to large buyers, such as hospitals, hotels, and schools, were $1d.$ per gallon higher than the wholesale prices.

The prices charged for milk to be made into milk products were similar to those at the end of the preceding contract period, except that milk for milk powder was charged at $4\frac{1}{2}d.$ per gallon instead of $6d.$ Milk for cheese, butter, and condensed milk for export brought between $3\frac{1}{2}d.$ and $4d.$ per gallon. The Government had, however, guaranteed a price of $5d.$ per gallon for manufacturing milk during the summer months and paid the Board the difference between $5d.$ and the price received for any milk sold below $5d.$ ¹ The average price received for manufacturing milk was $4.82d.$ per gallon

¹ See p. 192.

compared with just over 1s. for liquid milk. Including the Government subsidy, the average manufacturing return is raised to 5.55d.

The level delivery premium of $\frac{1}{2}$ d. per gallon remained for producers whose daily deliveries did not vary by more than

*Prices per gallon under the Milk Marketing Scheme for
the Contract Period April to September 1934*

	Apr.	May	June	July	Aug.	Sept.	Average
<i>Liquid Prices:</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>
In SE. region . . .	13	12*	12	13	13	13	12.64
In other regions . . .	12	12*	12	12	12	12	12
<i>Manufacturing prices† for milk made into:</i>							
Fresh cream . . .	7½	7½	7½	7½	7½	7½	7½
Tinned cream . . .	5	5	5	5	5	5	5
Chocolate . . .	8	8	8	8	8	8	8
Condensed milk . . .	6	6	6	6	6	6	6
Milk powder . . .	4½	4½	4½	4½	4½	4½	4½
Cheese, butter, and con- densed milk for export‡	3½	3½	3½	3½	4	3½	3.63
Other products . . .	9	9	9	9	9	9	9
Weighted average [excluding Government subsidy]	4.8	4.5	4.6	5.1	5.2	5.1	4.82
Weighted average [including Government subsidy]	5.6	5.5	5.5	5.7	5.6	5.6	5.55

* Plus $\frac{1}{2}$ d. for publicity.

† The Government guaranteed such a sum as would bring all manufacturing prices below 5d. up to this amount.

‡ See footnote to the table on p. 68.

10 per cent. from a stated quantity, but the 1d. premium for a 5 per cent. variation was dropped. This change bore most heavily on producer-retailers who had been entitled to the higher premium. In spite of efforts by the Board, the allowance of $\frac{1}{2}$ d. per gallon for transit risk on milk delivered to

dépôts was maintained in the South-Eastern region and raised to 1*d.* in the other regions. The majority of buyers, however, undertook to charge only $\frac{1}{2}$ *d.*

The whole contents of the Inter-Regional Compensation Fund in each month, together with the reserves from the winter period, were paid out during these months of heavy production.

The arrangement for retail prices was altered, following the advice of the Consumers' Committee.¹ Margins were prescribed, varying according to the population of the area, from 8*d.* per gallon in rural districts and in towns under 10,000 inhabitants to 10*d.* per gallon in larger towns and cities and in London. These margins were considered excessive by the Consumers' Committee, and it was arranged that lower margins would be sanctioned by the Board in areas where a majority of the retailers wished for them, but only ten such applications were sanctioned in this contract period.

Farmhouse cheese-makers were brought within the scope of the Scheme by offering them the advantages of the Government's subsidy on manufacturing milk, plus an additional allowance from the Board in order to induce them not to offer their milk to the Board. Cheese-producers with eight² milk cows or more were offered, in effect, an allowance of the Government subsidy with an extra 1*d.* per lb. to makers of hard cheese, and $\frac{1}{2}$ *d.* to makers of soft cheese, on condition that they guaranteed to sell no liquid milk. Cheese-makers numbering 1,324 and owning about 53,000 cows registered with the Board, and received payment on 18,846,042 gallons of milk during the six months. Producers of hard cheese received a total allowance of just under 2 $\frac{1}{2}$ *d.* per lb. and of soft cheese about 2*d.* per lb.

During the second contract period, total sales through the scheme amounted to 445,489,940 gallons; producer-retailers sold 50,461,416 gallons and 395,028,524 gallons were sold

¹ See p. 169.

² Twelve or more milk cows until August.

under wholesale contracts.¹ About 67 per cent. of the milk sold under wholesale contract went into liquid consumption and 33 per cent. into manufacturing outlets, compared with 80 per cent. and 20 per cent. in the six winter months. The Far-Western, Mid-Western, and West-Midland regions had the heaviest proportion of surplus milk, their respective percentages being 59, 51, and 50 per cent. of the sales in the regions.¹ The amount of manufacturing milk in the South-Eastern region was so low as 3 per cent. of the total sales. The highest surplus month was June, when 40 per cent. of the milk was manufactured; in the Far-Western region 63 per cent. was manufactured.

Of the 129,354,599 gallons which were manufactured, milk made into farmhouse cheese excluded, 33 per cent. was made into cheese, 21 per cent. into butter, 30 per cent. into condensed milk, 15 per cent. into fresh cream, and 1 per cent. into other products.¹ The amount of milk condensed rose from about 11 million gallons in the first contract period to about 28 million gallons in the six summer months.

The average pool prices varied from 10*d.* per gallon in May to about 10½*d.* in August and September. They were again highest in the South-Eastern region.¹ As a result, however, of inter-regional compensation, and of the reduced spread between liquid and manufacturing prices and in spite of the higher proportion manufactured, the difference between the pool prices in the South-Eastern and Far-Western regions ranged from ¾*d.* to 1½*d.* per gallon, and between the Eastern and Far-Western regions from ½*d.* to ¾*d.* per gallon. These spreads were about ½*d.* per gallon less than in the previous period. A levy of ¼*d.* per gallon was made in April, July, August, and September for expenses and reserves. No deductions for these purposes were made in May and June, but in May ¼*d.* was deducted for publicity.

Producer-retailers, who sold about 16 per cent. of the milk

¹ See Appendix, pp. 378-81.

for liquid consumption, paid an average levy of rather under $1\frac{1}{2}d.$ per gallon, or about $\frac{1}{4}d.$ less than in the winter period. When, however, the lower level delivery premium is taken into account, the net levy of nearly $1d.$ per gallon was rather higher than in the first six months.

During the second contract period, the Board reached an agreement with the Scottish Milk Marketing Board concerning milk shipped into England. Before the scheme came into force, Scotland shipped about $10\frac{1}{2}$ million gallons of milk a year into England; the English Board agreed to pay the Scottish Board the difference between the average pool price in England and the Scottish manufacturing milk price, less transport cost to England, on every gallon short of the above amount. They also negotiated minimum prices for fresh cream exported to England from Scotland. A cheese factory was established in Cumberland.

By the end of September, the Board had been working for almost a year. Total milk sales on which levies had been paid on a gallonage basis amounted to 838 million gallons.¹ About 627 million had been sold for liquid consumption, 83 per cent. under wholesale contract and 17 per cent. by producer-retailers. In the Far-Western region, and in South Wales, producer-retailers accounted for a substantially larger proportion of liquid sales, and in the Mid-Western and Southern regions for a substantially smaller proportion. About 211 million gallons, or 24.6 per cent., had been manufactured, of which some 19 million were made into cheese on the farm. About half this cheese was made in the North-Western region, a quarter in the Mid-Western, and the bulk of the rest in the West-Midland region and in North Wales. The importance of the different regions is clearly brought out; total sales under wholesale contracts varied from 195 million

¹ This figure excludes returns which were received too late to be included in the pools, and excludes sales by producer-retailers owning 4 milch cows, or fewer.

gallons, or 27 per cent. of the total, in the North-Western region, and 125 million in the Mid-Western to about 14 million in North Wales.

*Utilization of Milk sold under Wholesale Contracts in the Various Regions, 6 October 1933 to 30 September 1934**

	<i>Used liquid</i>	<i>Manu- factured</i>	<i>Total</i>	<i>Percentage manu- factured</i>
	000 gallons	000 gallons	000 gallons	per cent.
Northern . . .	34,351	7,434	41,785	17·8
North-Western . . .	140,328	54,280	194,608	27·9
Eastern . . .	30,104	2,705	32,809	8·2
East-Midland . . .	45,375	10,660	56,035	19·0
West-Midland . . .	35,656	28,006	63,662	44·0
North Wales . . .	9,321	4,486	13,807	32·5
South Wales . . .	16,467	8,018	24,485	32·8
Southern . . .	50,962	6,914	57,876	12·0
Mid-Western . . .	69,589	55,463	125,052	44·4
Far-Western . . .	12,375	12,408	24,783	50·1
South-Eastern . . .	76,295	2,250	78,545	2·9
Total . . .	520,823	192,624	713,447	27·0

* Excludes milk for which returns were made too late to be included in the original pools.

Third Contract Period, 1 October 1934 to 30 September 1935.

The terms of the second contract arranged by the independent persons appointed by the Minister had raised protests from farmers throughout the country. It was thought that prices were probably lower than in the preceding summer months, while distributors' margins were higher. As a full year had not elapsed since the end of the suspensory period provided by the Scheme, the Board were still unable to fix prices themselves without the agreement of the distributors. They stated, therefore, that if the distributors made it necessary to refer to the independent persons, they would only accept the terms for a period of two months.

Agreement was reached, however, for the next twelve-month period. The terms involve an increase both in wholesale and retail prices compared with the previous year. Wholesale prices in all regions are 1s. 4d. per gallon in three winter months and 1s. 5d. in the other three. This gives a $\frac{1}{2}$ d. increase in South-Eastern regional prices and 1d. in other regions. Summer prices are to be 1s. 4d. for two months, 1s. 1d. for two months, and 1s. for the remaining two, thus averaging about 1d. per gallon higher than in the summer of 1934 in the South-Eastern region and 1 $\frac{3}{8}$ d. higher in the other regions.

Retail prices have been slightly increased, and once again the Consumers' Committee protested.¹ In small towns of less than 10,000 inhabitants and in rural districts retail prices are fixed at 2s. throughout the year, except in May and June when they are to be 1s. 8d.; margins vary from 7d. to 11d. per gallon according to the month. In London and large cities of over 25,000 inhabitants in the South-Eastern region, retail prices are fixed at 2s. 4d. for October to April and 2s. for the remaining five months; margins vary from 11d. to 1s. per gallon. Margins between these two extremes are fixed for two intermediate sizes of towns. Again, it was provided that these margins might be reduced if the Board received a request from the majority of retailers in a district, and about 270 such requests had been granted by 25 January 1935.

Margins are also fixed for semi-wholesale transactions. The following minimum charges per gallon in excess of the prices paid to the Board have to be made for the re-sale of milk in daily quantities:

Not exceeding 500 gallons	.	.	.	.	.	1 $\frac{1}{2}$ d.
Exceeding 500 gallons but not exceeding 1,000 gallons	.	.	.	.	.	1 $\frac{1}{2}$ d.
" 1,000	"	"	"	1,250	"	1d.
" 1,250	"	"	"	1,500	"	$\frac{3}{4}$ d.
" 1,500	"	.	.	.	.	$\frac{1}{4}$ d.

¹ See p. 171.

It is further provided that semi-retail sales may be made at 4*d.* less than the appropriate retail price if daily sales are more than 1 gallon but not more than 4 gallons, or at 6*d.* less if they exceed 4 gallons but do not exceed 10 gallons.

Manufacturing prices are fixed, similar to those prevailing in the previous contract period, and the returns to the Board on the lower-priced categories are brought up to 6*d.* per gallon by the Government subsidy.

The level delivery premium of $\frac{1}{2}$ *d.* per gallon, for daily sales varying by not more than 10 per cent. from a specified quantity, is continued, but the allowance for transit risk on milk delivered to a depot is fixed at $\frac{1}{2}$ *d.* per gallon for all regions.

The Inter-Regional Compensation Levy is reduced to $\frac{3}{4}$ *d.* per gallon on all liquid sales in October, but raised to 1*d.* in November and $1\frac{1}{2}$ *d.* in December; all of the amount collected was distributed in these months. No deductions were made for expenses and reserves in October and November, but in December $\frac{1}{4}$ *d.* per gallon was deducted.

The Board again offers to pay to the farmhouse cheese-makers a bonus if they sell no liquid milk. They are offered three options:

- (1) To manufacture into cheese the whole of their milk production for the twelve months, 1 October 1934 to 30 September 1935.
- (2) To sell the milk produced from 1 October 1934 to 31 March 1935, and thereafter, until 30 September 1935, to manufacture it into cheese.
- (3) To sell the milk produced from 1 November 1934 to 31 March 1935, and to manufacture into cheese the milk produced in October 1934, and from 1 April to 30 September 1935.

The Board will then pay allowances to the maker of hard cheese equal to the Government grant, plus 3*d.* per gallon

from 1 October 1934 to 30 April 1935, or $2\frac{1}{2}d.$ per gallon from 1 May to 30 September 1935, and minus the Board's expenses levy. If, however, the Government grant falls below $1\frac{1}{2}d.$ per gallon, then the Board will increase the allowance by one-half the difference between $1\frac{1}{2}d.$ and the actual Government grant. To makers of soft cheeses the Board will pay the Government grant, plus one-half of the above allowances made to producers of hard cheese. One hundred and eighty-two farmhouse cheese-makers contracted under this Scheme.

The number of wholesale contracts registered with the Board at the end of December 1934 was 83,708, or 10 per cent. above the number in December 1933. Production had increased by a still greater percentage. The volume of milk sold by producer-retailers in the last two months of 1934 is not yet available, but the quantity sold wholesale through the Board amounted to 124,078,378 gallons,¹ or 18 per cent. more than in the corresponding period of 1933. Of this amount, 90,431,914 gallons were sold liquid, and 33,646,464 gallons for manufacture. In addition, 558,078 gallons were made into cheese by farmhouse makers. About 73 per cent. of wholesale sales were liquid, and 27 manufactured, compared with 83 per cent. and 17 per cent. in the corresponding period of 1933.

Thus, while liquid sales had increased only slightly between the two periods, manufacturing sales had doubled. The bulk of the increase in production had to find a manufacturing outlet.

The increase in liquid sales may be attributed, in part, to the milk in schools scheme. Under the Milk Act, the Exchequer was to contribute equally with the Board to stimulate the consumption of milk in schools. A plan was devised

¹ Provisional figure; it is increased by the inclusion of milk sold in schools of which a part was Certified and Grade A (T.T.) milk previously exempt from the scheme.

whereby school children were sold milk in $\frac{1}{2}$ -pint bottles at $\frac{1}{2}d.$ each—a charge equal to 1s. per gallon, or less than half the prevailing retail prices.¹ Distributors were allowed a 6d. per gallon margin, and the difference remaining between the liquid price in the region in each month and the sum received by the Board from the children was, in effect, shared between the Board and the Exchequer. This scheme came into operation in October.

Pool prices varied from 14 $\frac{3}{4}d.$ in the South-Eastern region in October and in the South-Eastern and Southern regions in December to 12 $\frac{1}{4}d.$ in the Far-Western region in October. The difference of 2 $\frac{1}{2}d.$ per gallon was the widest hitherto shown. Average unweighted pool prices were 13.55d. in October, 13.80d. in November, and 14.34d. in December, compared with 13.55d., 13.96d., and 14.32d. in the corresponding months of the preceding year.

Partial exemptions from the Scheme.

It was originally provided in the Scheme that owners of four milch cows or fewer, selling milk at wholesale, and milk producers selling only to their servants or households should be exempt from the scheme. The Board was also permitted to exempt from its main provisions producers and sales of such classes as it might from time to time determine.

Producers of Certified and of Grade A (T.T.) milk have hitherto been exempted, and need not obtain the Board's licence to retail. Producer-retailers owning four milch cows or fewer were assessed a levy of 10s. per cow per year during the first and second contract period, instead of a levy based on the gallonage sold. Since 1 October 1934 they have been given the option of accepting a levy on the number of cows or on the gallons sold. Those selling less than one gallon per day had been exempt from the levy, but this exemption was withdrawn on 1 October 1934.

¹ See p. 195.

Roll of Accredited Producers.

The Board was instructed under the Scheme to prepare, as soon as they thought it practicable, a roll of Accredited Producers, that is to say, dairy farmers whose milk came up to a certain prescribed standard. The Reorganization Commission for Milk had recommended that such producers should receive a bonus of 1*d.* per gallon above the price paid to those who failed to attain the necessary standard, and under the Milk Act it had been provided that a sum not exceeding £750,000 should be available from the Exchequer, spread over a period of four years, for securing a pure milk supply, free from the infection of any disease.¹

The Board considered the matter during the spring and summer, and in August produced a scheme which they hoped to put into force on 1 January 1935, which imposed a small levy on all milk produced, out of which a bonus of 1*d.* per gallon should be paid to all 'accredited' producers. The standard prescribed approximated to the existing Grade A standard. Three certificates were to be required from every producer who wished to qualify:

- (1) From the County Veterinary Officer, that all cows had been subject to a clinical examination within one month of the date of application. This examination must be repeated at intervals of not more than six months.
- (2) From the County Agricultural Organizer, that methods of handling and production on the applicant's premises are satisfactory.
- (3) From the County Medical Officer of Health or the County Bacteriologist, that two consecutive samples of the applicant's milk complied with stated bacteriological standards. Such tests must be made at least three times during the year.²

¹ See p. 194.

² *The Home Farmer*, vol. i, No. 4, August 1934.

This scheme involved the co-operation of the County Councils, who, however, opposed it, mainly on the grounds of expense, and the County Councils' Association decided, on 26 October, to support instead the recommendations of the Committee on Cattle Diseases¹ which provide a compulsory legal minimum standard for all milk sold liquid. Nevertheless, they suggested a conference between representatives of the Ministry of Health, the Ministry of Agriculture, the County Councils' Association, the Association of Municipal Corporations and the Board to discuss the matter. A meeting was held on 4 December, but no decision was taken.²

In January 1935 details were announced of the Government's Attested Herd Scheme, under the Milk Act. This scheme requires a higher standard than the Board's Accredited Producers Scheme, as it stipulates that certificates can be granted for a year to owners only of herds containing no cows reacting to the tuberculosis test. Owners of such herds are to receive 1d. per gallon bonus from the Exchequer for any milk sold through the Board, in addition to the 1d. to which they would become entitled under the Accredited Milk Scheme. Thus, producers of T.T. milk who can find no sale at special prices would receive, nevertheless, a bonus above the price paid to ordinary producers.

The Scottish Milk Marketing Scheme³

The Scottish Milk Marketing Scheme covers all milk sold in Scotland south of the Grampians, except small quantities sold by producers to their employees or neighbours. Producers selling at wholesale must do so through the Board, which fixes different prices for the milk according to the uses to which it is put. The returns are pooled and are augmented by levies from producer-retailers, producer-wholesalers, and

¹ See p. 186. ² A very similar scheme has since been started.

³ The Scottish Milk Marketing Scheme (Approval) Order, 1933, S.R. and O., 1933, No. 479/S. 26.

producers of Grade A and Certified milk. These 'category' producers make their own sales but must pay a levy on each gallon of milk sold to the Board amounting to nine-tenths of 'the cost per gallon of operating the scheme'. This has been interpreted to mean nine-tenths of the difference between the standard price and the pool price.

The Scheme came into force on 1 December 1933. Until May it was administered by a provisional Board of eight persons named in the scheme, and by two persons nominated by the Secretary of State for Scotland. At the annual general meeting held on 10 May and attended by under 500 persons out of the total of 8,358 registered producers, the 50 candidates proposed for the Selection Committee were duly elected. On 16 May the Committee met and selected a Board of eight, comprising four old members and four new. This Board re-elected the Earl of Stair as Chairman, and at its request the Secretary of State nominated two additional members, Mr. W. J. Harvey and Mr. John Dallas. The remuneration of the Board was fixed at £2,500, to be divided among the members as the Board decided.

The Board has so far fixed milk prices for three contract periods.

First Contract Period, 1 December 1933 to 31 March 1934.

The standard price charged to buyers for milk sold for liquid consumption during the first four months of operation was fixed at 1s. 2d. a gallon, and the retail price at 2s. a gallon, thus leaving a distributor's margin of 10d. This was the existing margin, and it was maintained on the advice of Mr. David Richmond, a consultant called in by the Board to examine distributor's costs. He found it impossible to make full examination of the matter from the figures submitted to him, and consequently recommended the maintenance of the *status quo*, pending further investigation.

The Board also fixed the prices at various stages of sale,

Prices per Gallon for the First Contract Period, December 1933 to March 1934

ADMINISTRATIVE ACTION

	Producer's			Wholesale			Retail	
	Standard s. d.	Producer- wholesaler s. d.	Bulk s. d.	Bottled pints and quarts s. d.	Bottled pints and quarts s. d.	Bulk and bottled pints and quarts s. d.	Bottled pints and quarts s. d.	Bottled pints and quarts s. d.
1. For Whole Milk. Where the distributor's total daily sales of liquid milk are:								
(a) 80 gallons and under*	..	1 5	1 5	1 7	1 10	2 0	2 0	2 0
(b) Over 80 gallons*	1 2	1 4	1 4	1 6	1 9	2 0	2 0	2 0
2. For Grade A (T.T.) and Grade A milk,† of liquid milk are:								
(a) 80 gallons and under*	..	..	1 8	1 10	2 0	2 4	2 8	2 8
(b) Over 80 gallons*	..	1 5	1 7	1 9	1 11	2 4	2 8	2 8
(c) Individual contracts for 100 gallons a day or over	..	1 4	1 6	..	..	..	..	..
3. For Certified Milk	..	2 2	..	2 7	..	3 0	..	..

* From January to March 1934, 50 gallons became the dividing quantity instead of 80 gallons.

† In December 1933, the price of Grade A milk was the same as that of whole milk.

and for different grades of milk. The minimum prices which had to be paid to producers and to producer-retailers and for wholesale and retail transactions are given in the table on page 83. Producers could charge higher prices if circumstances rendered this possible.

The Board also fixed prices for semi-retail transactions, made to hotels, restaurants, institutions, shipping companies, kennels, schools, bakers, biscuit manufacturers, and the like. These, given in the accompanying table, varied according to the volume of daily sales, from the wholesale to the retail price.

It was also decided that prices to charitable institutions,

Prices to Hotels, Restaurants, Shipping Companies, Kennels, Schools, Bakers, Biscuit Manufacturers, &c., December 1933 to March 1934

	Bulk	Bottled pints and quarts	Bottled $\frac{1}{2}$ pints
Where the total daily quantity purchased is:	s. d.	s. d.	s. d.
1. For Whole Milk:			
(a) Under 2 gallons	2 0	2 0	2 4
(b) Over 2 gallons and not exceeding 10 gallons	1 8	1 10	..
(c) Over 10 gallons and not exceeding 50 gallons	1 5	1 7	..
(d) Over 50 gallons	1 4	1 6	..
2. For Grade A (T.T.) and Grade A Milk:			
(a) 10 gallons and under	1 11	2 1	2 2
(b) Over 10 gallons but not exceeding 50 gallons	1 8	1 10	2 0
(c) Over 50 gallons	1 7	1 9	1 11
3. For Certified Milk:			s. d.
(a) 2 gallons and under . . . . .	..		3 0
(b) Over 2 gallons but not exceeding 10 gallons . . . . .	..		2 7
(c) Over 10 gallons . . . . .	..		2 6

such as hospitals and infirmaries, which were not chargeable to the rates, might be not less than 1s. 2d. per gallon for whole milk, 1s. 5d. per gallon for Grade A (T.T.) milk, and 2s. 2d. per gallon for Certified milk.

The Board fixed minimum butter-fat standards for milk sold directly through its agency; from February to July the minimum was to be 3·4 per cent., and from August to January 3·5 per cent. These minima did not apply to milk sold by producer-retailers, producer-wholesalers, or 'category' producers.

Prices were also fixed for milk sold for manufacture. These prices per gallon were, for milk made into:—

- (a) Cream—7½d. in December and 7¼d. from January to March.
- (b) Full Cream Cheese—an amount equal to the price per lb. of finest New Zealand cheese, as ascertained from the *Mark Lane Express*, less 1¼d. per lb. This was 3¼d. in December, 3½d. in January, and 3d. in February and March. Small distributors manufacturing cheese for their retail customers were in some cases charged from 6d. to 7½d. for the milk used in this way.
- (c) Butter—a price equal to the cheese price, where no outlet existed for the buttermilk, or to the cream price where such an outlet did exist.
- (d) Ice cream—1s. 6d.
- (e) Margarine—9d.
- (f) Full cream milk powder and tinned cream—6d.
- (g) Other products—9d.

Finally, haulage charges were fixed according to the distance of the producer's farm from the Royal Exchange, Glasgow, or the General Post Offices in Edinburgh and Dundee, whichever was the nearer. These charges were deducted from producer's prices and amounted to:

	<i>Per gallon</i>
For 5 miles and under	½d.
For more than 5 miles and less than 10 miles	¾d.
" " 10 " " " 20 " 	1d.
" " 20 " " " 30 " 	1½d.
" " 30 " 	1¾d.

Early in February, the Board devised a method of bringing farm cheese-makers within the scope of the scheme, to prevent them from offering their milk to the Board and thus depressing the pool price. The Board agreed to pay farm cheese-makers, who registered with it, an amount equal to the difference between the pool price for liquid milk less the haulage rate to the producer's farm, and the price of cheese; 1*d.* per lb. was to be added to cover the cost of making the cheese. The price during the months of February to May inclusive was to be the average price for the preceding month of finest coloured and white Canadian and New Zealand Cheddar, as ascertained from the *Mark Lane Express*, and, during the months of June to October inclusive, the average price for the preceding month of fine coloured and white Scotch Cheddar cheese, as determined by the Board, which was also to take into account the price of Dunlop cheese.

During the first month of operation of the Scheme, 12 per cent. of total milk sales was manufactured. Of the 5,704,601 gallons used for liquid consumption, rather under two-thirds was sold by the Board and over one-third by the 'category' producers.¹ As a result, the December pool price was 1*s.* per gallon.

This pool price was maintained in January and February 1934, in spite of a rise in the percentage manufactured to 17 per cent. and 20 per cent. in these two months. This was rendered possible in part by a modification of the definition of wholesale purchasers. From 1 January 1934, buyers who took more than 50 gallons a day were allowed to pay the standard price of 1*s.* 2*d.* per gallon, instead of 1*s.* 5*d.* as hitherto, and buyers of less than 50 gallons paid 1*s.* 4*d.* per gallon. As a result, a number of producers who had hitherto been classified as producer-wholesalers joined, after 1 January, in the ordinary pool. Thus, sales by 'category' producers in January declined more than liquid sales through the Board increased.

¹ See Appendix, p. 382.

In March farm cheese-makers added 581,194 gallons to the amount of milk manufactured. Sales of milk for manufacture by the Board also increased more than proportionately to liquid sales, so that the percentage manufactured rose from 20 to 32, and the pool price was reduced to 11*d.* per gallon.

During the four months total sales of milk amounted to 28,080,108 gallons,¹ of which 22,166,152 gallons were sold for liquid consumption, 66 per cent. by the Board and 34 per cent. by category producers; 5,327,714 gallons were sold by the Board for manufacture; and 586,215 gallons were made into cheese on farms under the Board's scheme.

Of the sales of milk for manufacture by the Board, nearly 60 per cent. was made into fresh cream, 17 per cent. into full cream cheese, 9 per cent. into butter, 5 per cent. into tinned cream, 4 per cent. into full cream condensed milk, and 5 per cent. into other products.

Already, in the first four months of its operation, the Scheme had been severely criticized. Some objection was made to permitting co-operative societies to pay dividends on the milk they sold; it was, however, stated that other retailers could do likewise, if they obtained the permission of the Board. A more serious complaint was that the Scheme gave excessive prices in the West and unduly low prices in the East. This agitation was to gain force in subsequent contract periods.

Second Contract Period, 1 April to 30 September 1934.

Early in March the prices decided upon for the next six months by the Board, in consultation with the Permanent Joint Milk Committee, were announced. The standard price of 1*s.* 2*d.* a gallon, with a retail price of 2*s.* a gallon was to be continued throughout the summer, instead of the customary reductions being made. Protests were made to the Consumers' Committee,² but the Committee of Investigation

¹ See Appendix, pp. 382-3.

² See p. 172.

upheld the Board's decision.¹ Milk in half-pint bottles was retailed at 2s. 4d. per gallon until May, when, on the recommendation of the Consumers' Committee, the price was reduced to 2s.

The wholesale prices charged for whole milk were slightly modified. Distributors with sales of 20 gallons or less, instead of 50 gallons or less, were to pay the producer-wholesaler's price; the latter was reduced from 1s. 5d. per gallon to 1s. 3d. Other wholesale prices were maintained in Glasgow, but reduced in other markets by 1d. per gallon, for sales of 50 gallons or less. In addition it was specially provided that only a buyer who contracted to take the whole of a producer's production, or any of his available surplus, should pay the standard price. In cases of level delivery at least 1d. per gallon extra was to be paid, and there was to be some extra payment when specially early delivery was required.

Whole milk in bulk sold semi-retail was reduced from 1s. 8d. to 1s. 6d. per gallon for daily deliveries of from 2 to 10 gallons. For other amounts prices were maintained. Semi-retail sales of bottled whole milk were, however, only provided for in this contract period at the retail price.

Grade A milk was left unchanged for all transactions, except that for bottled milk sold semi-retail in quantities exceeding 50 gallons a day; no price was provided lower than that for daily sales of from 10 to 50 gallons.

Certified milk sold by the producer-wholesaler was reduced by 2d. per gallon to 2s., and the retail price by 4d. to 2s. 8d. Semi-retail sales, when the total quantity purchased was 2 gallons or less, were to be made at 2s. 8d. per gallon; when from 2 to 10 gallons, at 2s. 6d. per gallon; and when over 10 gallons, at 2s. 4d.

Some modifications were also introduced in the prices charged to institutions. Charitable institutions were on the whole charged the same price as in the previous contract

¹ See p. 176.

period, except for certified milk, the price of which was reduced to 2s. per gallon. Other institutions were to pay 1d. or 2d. per gallon more for their milk.

Minimum Prices to Institutions, April to September 1934

	To Charitable Institutions		To other Institutions	
	Producer's price	Wholesale price	Producer's price	Wholesale price
	s. d.	s. d.	s. d.	s. d.
1. For Whole Milk .	1 2	1 2	1 3	1 3
2. For Grade A (T.T.) and Grade A milk where the daily delivery is:				
(a) 100 gallons and under .	..	..	1 5	1 6
(b) contracts for over 100 gallons .	1 4	1 4	1 4	1 5
3. For Certified Milk .	2 0	2 0	2 2	2 2

For manufacturing milk it was decided that the Board should discuss each month with the Manufacturing Subcommittee of the Permanent Joint Committee the prices which should be obtained for milk made into double cream and into butter. The price for cheese, instead of being based, as hitherto, on New Zealand cheese, was to equal the average during the previous month of finest Canadian and New Zealand Cheddar cheese, coloured and white, less 1½d. a gallon. The prices thus determined were as given in table on page 90.

Prices varied from 9d. per gallon for milk made into margarine and 7½d. for milk made into cream, to less than 3d. per gallon for milk made into cheese from April to June.

Liquid sales in the second period amounted to 34,908,015 gallons, of which 63 per cent. were sold by the Board and

27 per cent. by 'category' producers.¹ Manufacturing sales through the Board rose from 2,822,067 gallons in April to 4,099,122 gallons in June, and fell to 2,401,786 in September. They totalled for the six months 19,548,896 gallons, com-

*Prices per Gallon charged for Milk used for Manufacture,
April to September 1934*

	Apr.	May	June	July	Aug.	Sept.
	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>	<i>d.</i>
Cream	7½	7½	7½	7½	7½	7½
Butter*	7½	7½	7½	7½	7½	7½
„ †	4	3½	3½	3½	3½	3½
Cheese‡	2·95	2·81	2·95	3·35	3·54	3·58
Tinned cream	5	5	4½	4½	4½	4½
Full cream condensed milk	5½	4½	4	4	4	4½
Margarine	9	9	9	9	9	9
Full cream milk powder .	3½	3½	3½	3½	3½	4

* Where an outlet existed for buttermilk.

† Where no outlet existed for buttermilk.

‡ Higher prices were charged in some cases.

pared with 9,132,244 gallons made into farmhouse cheese. Of total milk sales of 63,589,155 gallons, 55 per cent. were sold liquid and 45 per cent. manufactured, compared with 79 per cent. and 21 per cent. in the previous contract period.¹

The bulk of the increase in manufacturing milk went into cheese; this absorbed 47 per cent. of manufacturing milk in the six summer months, compared with 17 per cent. in the four winter months; cream accounted for 34 per cent., butter for 7 per cent., tinned cream for 5 per cent., condensed milk for 2 per cent., and other products for 5 per cent.

During the second period the pool price was strengthened by the payment from the Exchequer of the sums necessary to bring all manufacturing prices up to 5*d.* per gallon, and by a contribution equal to that made for cheese manufactured in factories paid to farmhouse cheese-manufacturers owning

¹ See Appendix, pp. 382-3.

8 or more milk cows.¹ These payments, though not definitely secured until Parliament sanctioned them in July, were to be made from 1 April. The Board did not take full account of them in fixing its pool prices until July.

During this contract period the pool was credited with the sum paid by the English Milk Marketing Board as compensation to Scotland for keeping off the English liquid market.² The pool price, which had been 11*d.* per gallon in March, fell to 10*d.* in April, and 9*d.* in May and June, but rose in July to 9½*d.*, August to 10½*d.*, and September to 11*d.*

At the elections held in May half the provisional Board failed to secure re-election, an indication of the dissatisfaction of many producers with the Scheme. In the first place, the producer-retailers and other 'category' producers objected to the levies. Under the Scheme they must pay nine-tenths of 'the costs of operating the Scheme'. The Board had interpreted this as being nine-tenths of the difference between the standard price and the pool price in any month—a difference which had varied from 2*d.* a gallon in December and January to 5*d.* a gallon in May and June. The 'category' producers maintained that the only relevant cost was that of running the Board, amounting to about ½*d.* per gallon, and that the other deductions from the standard price, used for such purposes as buying creameries, building up reserve funds and, in particular, resulting from the lower returns obtained for the substantial proportion of the milk which was manufactured, could not be included as costs. The matter was taken to the Court of Session, who held that the costs must be taken to include the *whole* costs, as interpreted by the Board.

But the Board has found it extremely difficult to collect the levies. A number of producers in the East and South-East of Scotland joined together as the East of Scotland Milk Producers' Federation, and refused to pay their levies.

¹ See p. 192.

² See p. 74.

By October, the situation had become so serious that the Board took out about 1,500 summonses for failure to pay.

A further cause for dissatisfaction was the maintenance of a constant price throughout the country. Before the scheme, prices, both retail and to the producer, had been higher in the East than in the West. The bulk of Eastern producers concentrated on level delivery throughout the year and considered that, owing to their higher costs, they were entitled to a higher return. On the other side, it was maintained that the competition of Western producers was leading to a uniform price throughout the country, and that the advent of the Scheme had merely hastened an inevitable development.

The East of Scotland Federation laid their case in May before the Committee of Investigation, which reported in July in favour of some temporary provision to alleviate the position of level producers during the period of necessary readjustment to changed conditions.¹

Negotiations between the Board and the parties interested had produced no agreement when the new contract terms for the period, beginning in October 1934, were announced.

Third Contract Period, 1 October 1934 to 30 September 1935.

The Permanent Joint Milk Committee failed to agree on the period for which the contract should endure, and upon the standard price and distributive margin. This matter was therefore referred to the consultant, Mr. D. A. Richmond. He recommended a contract for twelve months, a standard price of 1s. 2d. per gallon, and a retail price of 2s. per gallon. It was agreed, however, that the standard price could be varied in any month, provided that the average for the year was kept at 1s. 2d. The Board subsequently proposed to raise the price to 1s. 3d. per gallon for the four months November to February, and to lower it to 1s. 1d. during four summer months. In recommending the maintenance of the 10d. per

¹ See pp. 95 and 176.

gallon distributive margin the consultant stated that the Board had given him no adequate reason for reduction, and the distributors no evidence as to their costs. He asked for figures on costs of production and costs of distribution.

The minimum price of 1s. 2d. per gallon applied only to the delivery of milk once a day at the buyer's premises, at an hour not earlier than that usual in the district. Other services were to be paid for. In particular an extra 1d. per gallon should be paid where the distributor required a level delivery with not more than a 5 per cent. variation each way, and an extra 2d. per gallon where he required wholesale services, such as the delivery of the quantity of milk which he required each day. In months where the standard price was 1s. 2d. the only changes in the producer's prices were that the wholesale price of bottled half pints of whole milk was reduced by 1d. per gallon, and that half pints of milk were retailed at the same price as quarts and pints. In months where the standard price differed by 1d. per gallon from 1s. 2d. the producers' and wholesale price for whole milk and for Grade A milk, but not for Certified milk, were also to vary by the same amount.

Certain changes were also made in the classification and in some of the prices of milk for semi-retail sales.¹

The differentiation in charges made to charitable and to non-charitable institutions was removed, and they were to have whole milk at not less than the standard price, Grade A milk at not less than 3d. per gallon above the standard price, and certified milk at not less than 2s. per gallon.

The prices for manufactured milk were to be determined from time to time by the Board. During the first two months of the new contract period they were approximately equal to those of the last months of the old contract period. The Government grant, however, brought the realization value of the lower priced products up to 6d. per gallon.

¹ See p. 94.

During the contract period the milk in schools scheme was started in Scotland.¹ The Board aimed at supplying all schools with Grade A (T.T.) milk.¹

Haulage rates were reduced on 1 December by $\frac{1}{4}d.$ per gallon for hauls from 20 to 40 miles.

Semi-Retail Prices, October 1934 to September 1935

	Bulk	Bottled
Where the quantity delivered is:	s. d.	s. d.
1. For Whole Milk:		
(a) 2 gallons and under	2 0	2 0
(b) Over 2 gallons and not exceeding 10 gallons	1 8	1 10
(c) " 10 " " " 50 "	1 6	1 8
(d) " 50 gallons	1 5	1 7
2. For Grade A (T.T.) and Grade A Milk:		
(a) 2 gallons and under	2 4	2 4
(b) Over 2 gallons and not exceeding 10 gallons	1 11	2 1
(c) " 10 " " " 50 "	1 8	1 10
(d) " 50 gallons	1 7	1 9
3. For Certified Milk:		
(a) 2 gallons and under . . . . .	..	2 8
(b) Over 2 gallons but not exceeding 10 gallons .	..	2 6
(c) " 10 gallons . . . . .	..	2 4

In the first two months of the contract period 71 per cent. of the total milk supply was sold liquid, and 29 per cent. manufactured, of which 14 per cent. was made into cheese on farms.² Of manufacturing sales by the Board 55 per cent. was made into cream and 29 per cent. into cheese.²

Pool prices equalled $11\frac{1}{2}d.$ per gallon in October, and with the increase in the standard price to $1s. 3d.$ rose to $1s. 0\frac{1}{4}d.$ in November and $1s. 1d.$ in December.

Throughout this contract period the dispute of the Eastern producers with the Board continued, and attempts were made to arrive at a satisfactory compromise. The Board submitted amended proposals to the Committee of Investigation for improving the position of level producers. They reiterated

¹ See p. 196.

² See Appendix, pp. 382-3.

their offer of a bonus to level producers of *2d.* a gallon from March to August or, alternatively, of a variation of the standard price so as to give higher returns in winter than in summer. Of the two alternatives they preferred the latter. They suggested 6 new haulage centres in the East, instead of only an additional 3, offered to base producer-retailers' levies on a per cow instead of a gallonage basis, and asked for powers to discourage excessive production. The Committee of Investigation agreed to their suggestions preferring the variation of standard prices to a level-delivery bonus; one member dissented from the proposal to discourage excessive production.

The Secretary of State for Scotland then met representatives of the Board and of Eastern and Western producers, and later he communicated in writing to the various parties the outlines of settlement terms which he proposed. These included:

- (1) The variation of standard prices as recommended by the Committee of Investigation.
- (2) The establishment of the 6 haulage centres suggested by the Committee, and of 4 additional haulage centres in the East.
- (3) A bonus of $\frac{1}{4}d.$ per gallon to be paid by the Board to all producers during 1935 who contract to sell through the Board each month a quantity not exceeding by more than 10 per cent. the amount so sold in December 1933.
- (4) Producer-retailers and producer-wholesalers to pay a levy of $\pounds 5$ per cow per year, instead of a levy based on their sales.
- (5) The Board to be given powers to discourage excessive production; Certified and Grade A (T.T.) milk to be exempt from such restrictions.
- (6) The Board to consider the possibility of financing their creamery purchases in a way which would bear less heavily in the immediate future.
- (7) The Board to carry out its intention of not pressing for immediate payment of levies in arrears in cases of serious hardship.

The Western Producers' Federation was prepared to accept these proposals, as the limit to the concessions which it would

make. They were not acceptable in the East, which reiterated its intention to break away from the Scheme, and urged its Members of Parliament to press the Secretary of State for further concessions. In a revised offer the Secretary of State suggested 12 additional haulage centres in the East instead of 10, an increase from $\frac{1}{4}d.$ to $\frac{1}{2}d.$ per gallon in the bonus for producers who supplied no more than 10 per cent. more milk than in December 1933, and a reduction of the levy on producer-retailers who sold no milk otherwise than by retail from £5 to £4 a cow. In addition, he announced his intention in conjunction with the Minister of Agriculture to appoint a Reorganization Commission for Great Britain, to examine the milk situation and the possibilities of further improvement in marketing, including the question of co-ordination or amalgamation of schemes. The question of production control was to be left to this body.

These additional proposals were very unpopular in the West, which considered that the Secretary of State had yielded to political pressure and gone far beyond the recommendations of the Committee of Investigation in granting not only a standard price varying between winter and summer, but also a bonus for level producers which had been put forward as an alternative suggestion.

Amendments to the Scheme.

The Minister's proposals were embodied in Orders under the Agricultural Marketing Act. The first Order¹ provided for amendments to the Scheme, involving the $\frac{1}{2}d.$ per gallon bonus for level producers, the levy on producer-retailers based on the number of cows in their possession, except in the case of small producers, and the extension of the system to producer-wholesalers.

¹ The Scottish Milk Marketing Scheme (Amendment) Order, 1934. S.R. and O., 1934, No. 1437/S. 74.

The second Order¹ involved directions to the Board to determine the Standard Price during 1935 at 1s. 3d. per gallon in January and February, 1s. 2d. in March, August, and September, and 1s. 1d. from April to July. In addition, haulage centres were to be established at Alloa, Brechin, Crieff, Cupar, Dundee, Dunfermline, Duns, Edinburgh, Galashiels, Glasgow, Haddington, Kinross, Kirkcaldy, Perth, and Stirling.

Creameries.

The Board took over, at a valuation of £200,000, nineteen creameries and milk depots which formerly belonged to farmers' co-operative associations. The purchase of and improvements to the creameries were financed by a loan which will be repaid over ten years, from deductions from producers' accounts varying from $\frac{1}{2}$ d. per gallon in the first year to $\frac{1}{2}$ d. in the last year. Improvements costing £135,000 are in contemplation, including a new depot in Glasgow and a condensing factory at Kirkmichael.

The Aberdeen and District Milk Marketing Scheme²

The second Milk Marketing Scheme to be adopted in Scotland developed from the operations of the Aberdeen and District Milk Agency, Ltd., and refers to the counties of Aberdeen and Kincardine, and to all burghs within these counties. It passed Parliament on 27 March 1934, and it was announced on 25 June that 79 per cent. of the 626 registered producers, owning 87 per cent. of the cows, voted in favour of the Scheme.

All producers must register except those 'who sell milk only in small quantities to persons in their employment or to

¹ The Scottish Milk Marketing Scheme (Directions) Order, 1934. S.R. and O., 1934, No. 1638/S. 75.

² The Aberdeen and District Milk Marketing Scheme (Approval) Order, 1934, S.R. and O., 1934, No. 309/S. 21.

neighbours for their own consumption', and the Board is to decide who is exempt if any question should arise. 'Small quantities' have since been defined as 'total sales of less than two gallons a day sold to not more than six domestic consumers'. The Scheme is administered by a Board consisting of the members for the time being of the Committee of Management of the Aberdeen and District Milk Agency, Ltd., and, until the first General Meeting, of two persons nominated by the Minister, and, as soon as practicable, of four persons elected by registered producers who are not members of the Aberdeen and District Milk Agency, Ltd. After the first General Meeting the two latter categories are to be superseded by two members co-opted by the Board after consultation with the Market Supply Committee, and of four persons elected annually at the General Meeting by registered producers not members of the above Agency.

Registered members, except producer-retailers and producers of Certified milk, may only sell through the Board or to an agency approved by the Board. In particular, it is laid down that any registered producer who is not a member of the Aberdeen and District Milk Agency, Ltd., must sell his milk to that Agency if so directed by the Board. The Board must dispose of all milk tendered to it by registered producers and pool the returns.

The Board fixes prices. A standard price is established for the sale of untreated milk for liquid consumption, and prices for special services, for milk producer-retailed, and for Certified milk. A price lower than the standard price may be authorized for sales of liquid milk for experimental or charitable purposes, or to public institutions.

The Scheme follows the example of the Scottish Milk Marketing Scheme in stipulating the approval by the Board of all persons who carry milk by road, and in giving power to the Board to fix the rates which they shall charge.

Joint Committees of the Board, distributors, manufac-

turers, and haulage contractors are invited to meet to facilitate the fixing of prices and haulage charges.

Provision is made for the determination of a basic quantity for each registered producer, other than producer-retailers or producers of Certified milk. This feature is new to the Milk Marketing Schemes in this country, though common in America and adopted by the Permanent Joint Milk Committee in England from 1922 to 1929. The basic quantity is related to sales by each producer during the preceding November, December, and January, or, for new producers, to an estimate of what such sales might have been from the number of cows which each owns. The producer will, in any month, be paid the standard price for such basic quantities; any amount offered in excess is paid at such a price as the Board may from time to time determine.

Producer-retailers and producers of Certified milk may sell to whom they please but not below the price fixed by the Board for such milk; they do not share in the general pool. They must contribute to the funds of the Board, and must make monthly returns of the amount of milk which they sell.

The Scheme came into operation on 1 August 1934. The Board consists of nineteen members, twelve of whom came from the Committee of Management of the Aberdeen and District Milk Agency. Registered producers who were not members of the Agency were entitled to elect four other representatives to the Board, and of these three were members of the Agency. Two persons were appointed by the Secretary of State for Scotland.

There are 816 registered producers in the Scheme, 7 of whom produce Certified milk; 401 are producer-retailers, including 73 selling some milk wholesale, and 408 are ordinary producers. Applications for exemption were received from some 250 to 300 small producers who were competing strongly with, and undercutting, registered producer-retailers.

Exemption was granted only on condition that they agreed not to increase their business.

Producer-retailers and producers of Certified milk are partially exempt from the Scheme; they contribute a levy towards the cost of the Scheme of £2 per cow per annum or approximately $\frac{1}{2}$ d. per gallon. The ordinary producers' contribution has been fixed at 2d. per gallon during each month since the commencement of the Scheme. Producers of Certified milk may also sell their milk as ordinary milk, but only at a price not less than the retail price for ungraded as determined by the Board.

'Basic quantities', that is to say, the quantity to which the payment of the full price is guaranteed, have been allotted to registered producers other than producer-retailers and producers of Certified milk. Production in the area is fairly level throughout the year and it is not intended to vary the basic quantities seasonally. Members of the Aberdeen and District Milk Agency were allotted basic quantities as determined previously by the Agency, on the basis of November to January 1933-4 production, and basic quantities for any producer who was not a member of the Agency were fixed at the full amount of his sales of milk for liquid consumption prior to the inception of the Scheme. There are arrangements covering the admission of new producers.

Producer-retailers are not allotted basic quantities except in so far as they sell milk wholesale.

Prices for the first four months of the Scheme were the prices arranged under the Agency contracts which did not end until 30 November:

Retail price to consumer, per gallon	2s. 0d.
Standard price to producer for basic-quantity milk	1s. 2d.
Surplus milk	8d.

These prices are for milk delivered at Aberdeen, the average haulage costing about 1d. per gallon. So far, the Board has

paid the existing haulage rates, but the following new scale of charges operates from 1 January 1935:

From farms up to 5 miles from Aberdeen	1d. per gall.
„ exceeding 5 but not exceeding 15 miles	¾d. „
„ „ 15 „ „ 20 „	1d. „
„ „ 20 „ „ 30 „	1½d. „
„ „ 30 miles	1½d. „

For the period commencing 1 December 1934 the Board determined the following prices:

Retail	2s. per gallon
Hotels and restaurants:	<i>bulk</i> <i>bottled</i>
over 2 and not exceeding 10 gallons	1s. 8d. 1s. 10d.
„ 10 „ „ 50 „	1s. 6d. 1s. 8d.
„ 50 gallons	1s. 5d. 1s. 7d.
Institutions maintained by voluntary contributions to be not less than the standard price.	
Hospitals and institutions controlled by public authority to be not less than 1d. in excess of the standard price.	
Standard price to distributors, except June to August	1s. 3d. ¹
„ „ „ „ June to August	1s. 2d.

The Board are prepared to consider the question of fixing retail prices at less than 2s. in purely rural areas.

The principal distributors are not prepared to pay these increased prices and an appeal to the Minister has been lodged in accordance with their right under the Acts, but notice of this has not been received by the Board from the Minister.

No price has been fixed for graded milk. The minimum prices for ordinary milk apply, therefore, to the graded milk, although no attempt has been made by graded producers to sell at the *minimum price*. The lowest price at which Certified milk is sold retail at present is 2s. 8d. per gallon.

The following table gives the quantities of milk and

¹ The distri

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per gallon for each month,
a that area than elsewhere.



their disposal for each month since the Scheme started. In August only 4.2 per cent. was surplus; in September, October, November, and December surplus amounted to 2.8 per cent., 3.1 per cent., 3.0 per cent., and 11.5 per cent. of the total milk sold. Most of it is made into butter and cream.

Quantities and Utilization of Milk handled by the Aberdeen and District Milk Marketing Board, August to December 1934

	Sold for liquid consumption			Used for manufacture			
	Within the area of the Scheme	Outwith the area of the Scheme	Total	Total	Percentage made into		
	gallons	gallons			gallons	gallons	Butter	Cream	Cheese
August .	503,763	112,724	616,487	26,321	49.7	50.3	..
September	477,646	120,240	597,886	17,522	44.9	52.3	2.8
October .	474,040	127,094	601,134	18,761	57.5	37.4	5.1
November	505,246	127,932	633,178	19,080	79.1	20.9	..
December*	..	..	571,948	74,720†	39.7	37.7	22.6

* Including 10,571 gallons sold by producer-retailers in previous months. † The return to producers for this milk was 7d. per gallon less the contribution of 2d. per gallon.

At present the Board is paying the standard price for practically all the milk sold, for in the first five months the milk which was surplus to the total basic quantities was only 8,504 gallons, 10,494 gallons, 13,992 gallons, 17,817 gallons, and 22,858 gallons. The explanation is that much milk is sold for liquid consumption outside the area of the Scheme. Most of it is sold to Lancashire and London, for which the English liquid milk price less transport, about 1½d. per gallon, and agent's commission, is received, since there is no agreement with the English Milk Marketing Board such as that made with the Scottish Milk Marketing Board.¹ Should this market disappear then there would be a large amount of basic-quantity

¹ See p. 74.

milk which would be surplus to the liquid milk requirements of the area of the Scheme, but which would have to be paid for at standard prices.

The scheme for the supply of cheap milk to schoolchildren under the Milk Act, 1934, has not yet been adopted for this area, but the Board is negotiating with the Department of Agriculture.

The North of Scotland Milk Marketing Scheme¹

The North of Scotland Milk Marketing Scheme, which passed Parliament on 5 July 1934, was the third Scottish Milk Marketing Scheme to be introduced. At the end of August 73 per cent. of the 348 registered producers, owning 76 per cent. of the cows, voted in favour of the Scheme, which accordingly remained in force.

The Scheme applies to the counties of Inverness, Nairn, Ross and Cromarty, Sutherland, and Caithness, and to the burghs therein, and it follows closely the Aberdeen and District Milk Marketing Scheme. There are, however, a few differences. The Board is to consist of five members; those to operate the Scheme until the First General Meeting are nominated in the Scheme; subsequently they are to be elected by the General Meeting, and each year two are to retire from office and to be eligible for re-election. In addition, two members of the Board are to be nominated by the Minister in the first period, and subsequently co-opted by the Board after consultation with the Market Supply Committee.

The basic period is to be September to December, and a basic quantity is to be established for all producers except producers of Certified and Grade A (T.T.) milk.

Producer-wholesalers, as well as producer-retailers and producers of Certified milk, are partially exempt from the Scheme, and may sell to whom they please. The levies that

¹ The North of Scotland Milk Marketing Scheme (Approval) Order, 1934. S.R. and O., 1934, No. 703/S. 42.

producer-retailers must pay to the Board are fixed at nine-tenths of those paid by ordinary producers, while producer-wholesalers and producers of Certified milk must pay seven-tenths of the ordinary levy. It is expressly provided that the levies made shall not be used for equalizing payments on surplus milk, though they may be used to pay the standard price for any quantities of Certified milk and Grade A (T.T.) milk, and for all basic quantities of milk sold through the Board. Further, if these classes of producers cannot dispose of all their milk themselves, the Board must accept it at the standard price, if the producer who tenders it is selling less than his basic amount, for such amount as shall bring it up to the basic amount, and at the surplus price for any excess above this.

Any producer already selling more than his basic amount will receive only the surplus price for any milk sold through the Board.

The Board began operations on 1 October 1934, but it was not completely organized by the end of the year, several important details remaining unsettled.

The provisional Board of seven members was still in office in December and had worked the Scheme for three months, the number of registered producers being 399 at the end of the year; of these 256 were producer-retailers, 10 were producers of Certified milk, and 133 were ordinary producers.

There are no contracts between the Board and producers, and arrangements are made on a monthly basis except for milk prices. At the end of each month the distributor states his requirements of liquid milk for the following month, for which he pays a standard price; should he require further supplies these are paid for at 'accommodation' prices; should he not sell all his supplies he has to deal with his own surplus.

Basic quantities have been allotted to all producers and to producer-retailers, calculated on production in September to December 1933. The Board takes from the producer-retailers

any milk which they have not sold, up to their basic quantities; otherwise the producer-retailer deals with his own surplus. Other producers' milk which is surplus to their basic quantities is sold at manufacturing price.

The following prices per gallon were obtained during the first three months of the Scheme:

Retail price to ordinary consumers	2s. 0d.
Retail price to hotels, restaurants, ice-cream manufacturers, bakers, &c.	
Under 1 gallon per day	2s. 0d.
1 gallon and under 2 gallons	1s. 8d.
2 gallons but not exceeding 10 gallons	1s. 5d.
Exceeding 10 gallons	1s. 4d.
Institutions, other than charitable, including nursing homes and hostels	1s. 6d.
Charitable institutions not supported out of rates	1s. 3d. ¹

These were minimum prices for milk reaching a 3.3 per cent. butter-fat standard. Grade A (T.T.) and Certified milk prices were 2d. and 4d. per gallon, respectively, higher than those for ungraded milk. Special services were to receive special remuneration.

Accommodation milk was charged at 1s. 6d. for quantities under 10 gallons and 1s. 4d. for 10 gallons and over.

The standard price paid to producers for basic-quantity milk was 1s. 2½d. per gallon, delivered to the Board. Surplus prices will eventually be nearly 6d. per gallon when the Government subsidy is obtained. The price realized for surplus milk was not, however, near that figure; some was sold for cream at 7½d. per gallon, some for cheese at about 4d., while some realized 3½d. per gallon when made into butter, of which 2d. was paid to the depot which handled and manufactured the butter, so that the net realization value of this milk was only 1½d. per gallon.

Levies of 10d. per gallon by producer-retailers, 90d. by

• ¹ Plus 1d. for haulage charges.

Certified-milk producers, and *id.* by ordinary producers have been paid on all milk sold. These are placed in a fund for expenses of administration and to help to pay the standard price for basic quantity milk. So far the Board has, in general, left existing transport rates untouched.

The following table shows the quantities of milk handled during the months for which figures are available. In October

Quantities and Utilization of Milk handled by the North of Scotland Milk Marketing Board, October to December 1934

	<i>Sold for liquid consumption</i>		<i>Surplus</i>			
	<i>Ordinary contract</i>	<i>Accommodation</i>	<i>Butter</i>	<i>Cream</i>	<i>Cheese</i>	<i>Total</i>
	gallons	gallons	gallons	gallons	gallons	gallons
Oct.	52,241	1,319	4,877	5,281	4,270	14,428
Nov.	47,689	2,243	4,746	5,998	481	11,225
Dec.	47,348	2,343	2,845	7,062	2,281	12,188

surplus amounted to 21 per cent. of the total, in November to 18 per cent., and in December to 21 per cent.

Various problems are confronting the Board, the most important of which concerns the allocation of basic quantities. In October the total of the basic quantities to be paid for at full standard price exceeded the amount sold for liquid consumption by about 9,685 gallons; this had to be sold at manufacturing price. If this continues, basic quantities must be scaled down.

A further problem is the allocation of quotas to seasonal producers. There are three or more areas within the Scheme where production is very seasonal, some of it to meet a summer holiday market such as in the Spey valley, and the Fort William district, in which little or no milk is produced in the winter. It is impossible, therefore, to allocate basic quantities on the basis of September-December production,

but the Board should be able to vary the allotted basic quantities to meet these conditions.

Again, there is some vagueness, as in the Aberdeen and District Scheme, about the exemption 'of producers who sell milk only in small quantities to persons in their employment or to neighbours for their own consumption'. There is considerable complaint by registered producer-retailers of undercutting by these small producers. The Board has attempted to tighten up the Scheme by allowing exemption only to those with two cows and under.

The scheme for supplying cheap milk to schools was passed by the Board in December, but was not in operation at the end of the year.

Attempts were made at the end of the year to arrange prices with the distributors. Retail prices for 1935 are to remain at 2s. per gallon, and the distributors' margin will be 9d. throughout the year with the exception of four months, April to July, when it will be 10d. This will give a standard price of 1s. 3d. for eight months and 1s. 2d. for four months.

The Northern Ireland Milk Marketing Scheme

A Scheme for the marketing of milk in Northern Ireland was embodied in the Milk and Milk Products Act (Northern Ireland), 1934,¹ and in the Statutory Orders issued under this Act. The provisions of these measures are described in detail on pp. 23-7. The principles of the Scheme are somewhat different from those of the various Schemes in Great Britain. No pool is operated. Four grades of milk are provided, of which only the three highest can be sold for liquid consumption. The prices of the various grades may differ, and levies increasing from the highest to the lowest grade are made on liquid sales, so that the return to the producer decreases as the grade declines. The lowest grade can only

¹ Milk and Milk Products Act (Northern Ireland), 1934, 24 & 25 Geo. V, ch. 16.

be manufactured and will receive the minimum price guaranteed by the Government. When producers deliver the higher grades to creameries, they are to be paid bonuses above the manufacturing price varying according to the grade. These bonuses are financed out of the levies on the sale of liquid milk and out of a levy on the sale of butter and margarine.

The Scheme is administered partly by the Ministry of Agriculture for Northern Ireland, and partly by a Joint Milk Council composed of nominees of the Minister of Agriculture and the Minister of Home Affairs (the latter being intended to represent consumers), and of members elected by producers and distributors.

Joint Milk Council.

This Council is partly responsible, in conjunction with the Ministry of Agriculture for Northern Ireland, for administering the Milk and Milk Products Act of 1934.¹ The Ministry is solely responsible for the price fixed for milk sold to a creamery for manufacture. It was established in the Act that this price should be, for Grade D milk, 5*d.* per gallon in summer and 6*d.* per gallon in winter, from 1 April 1934 to 31 March 1936, as guaranteed under the Milk Act, 1934, of the United Kingdom Parliament. This guaranteed price was paid from 1 April 1934. In addition, from 16 August 1934, producers delivering Grade A or Grade B milk to a creamery were to receive a bonus of 2*d.* per gallon above this price, and those delivering Grade C milk a bonus of 1*d.* per gallon.

Thus creameries had to be paid equalization fees in order to bring their payments for milk up to these levels. These were financed,

- (1) from a grant from the British Treasury not exceeding £200,000 in the year, on the lines of that paid to the

¹ See p. 23.

Marketing Boards in Great Britain,¹ in order to raise the price of milk made into cream and butter to 5*d.* per gallon in summer and 6*d.* per gallon in winter;

- (2) from a levy on milk sold to distributors or sold liquid, of $\frac{1}{10}$ *d.* per gallon on Grade A milk, 1*d.* per gallon on Grade B milk, and 3*d.* per gallon on Grade C milk. These levies are not payable on milk delivered to creameries for manufacture; and
- (3) from a levy of 4*s.* 8*d.* per cwt. on all sales of butter and margarine in Northern Ireland.

The functions of the Joint Milk Council are confined to fixing the prices, both to producer and consumer, of the three grades of liquid milk, subject to the approval of the Ministry of Agriculture, and to advising the Ministry on the standards for these grades. Its first determinations were for the period 16 December 1934 to 12 May 1935. They provided that all milk sold by a licensed producer to a licensed distributor must be sold under contract. Minimum prices were to be, per gallon:

	<i>To the producer for milk sold loose</i>	<i>To the consumer for milk delivered</i>
For Grade A milk	1 <i>s.</i> 4½ <i>d.</i>	2 <i>s.</i> 2 <i>d.</i>
" " B " 	1 <i>s.</i> 2½ <i>d.</i>	2 <i>s.</i> 0 <i>d.</i>
" " C " 	1 <i>s.</i> 2½ <i>d.</i>	1 <i>s.</i> 10 <i>d.</i>

It should be noted that, when the levies are taken into account, Grade B producers receive 2*d.* per gallon more than Grade C producers, and Grade A producers 2½*d.* per gallon more than Grade B producers.

Milk bottled on the farm, in bottles supplied by the distributor, was to receive 1½*d.* per gallon more than the above prices to the producer.

These prices are payable for milk delivered at the distributors' premises and are subject to deductions for transport when this is undertaken by the distributor. For milk

¹ See p. 192.

delivered within the County Borough of Belfast maximum charges for carriage are provided, as follows:

Within 5 miles of city centre	$\frac{1}{2}d.$	per gallon
From 5 to 10 miles of city centre	$\frac{3}{4}d.$	„
„ 10 „ 15 „ „	$1d.$	„
„ 15 „ 25 „ „	$1\frac{1}{2}d.$	„
„ 25 „ 35 „ „	$2d.$	„

For any additional 10 miles of distance above 35 miles a further $\frac{1}{2}d.$ per gallon may be deducted.

The prices to the consumer are for milk delivered in small amounts within the County Borough of Belfast, the Borough of Bangor, and the Urban Districts of Holywood and Lisburn. Milk not delivered, or daily sales of more than one gallon, may be retailed at $4d.$ per gallon less than the above prices. Milk sold by producers to public hospitals is to be sold at the producers' and not at the retail price.

This completes the description of Milk Marketing Schemes already in operation. Two others are under consideration.

The Moray and Banff Milk Marketing Scheme

Moray and Banff lie between the areas covered by the Aberdeen and District and the North of Scotland Milk Marketing Schemes, and a Scheme for this area was submitted on 1 May 1934. Objections were raised but were withdrawn on certain alterations being made by the promoters; these were particularly concerned with the interests of producers of Certified and Grade A (T.T.) milk, which forms a very considerable percentage of the supply within the area. There is no need, therefore, for an inquiry; any subsequent necessary amendments may be inserted as amendments by the Minister. The Scheme now depends upon approval by Parliament and acceptance by producers.

The Scheme proposes the formation of a provisional Moray and Banff Milk Marketing Board, consisting of five members

and two nominees of the Secretary of State for Scotland. The subsequent Board, to be elected at the first Annual General Meeting to be held within twelve months from the date on which the Scheme comes into force, shall consist of five members elected by producers and two persons co-opted after consultation with the Market Supply Committee. The Scheme provides for the subsequent retirement and election in rotation of members of the Board.

The Scheme resembles that for the Aberdeen and District area. Registered producers are to be allotted basic quantities of milk to be paid for at standard prices, and determined on their sales during November, December, and January immediately preceding the date of their determination. Producer-retailers are to have a basic quantity only for milk sold by them otherwise than by retail. Registered producers of Certified and Grade A (T.T.) milk are allotted basic quantities based on average daily sales by them to, or through, the Board during November, December, and January in each year. New producers are to be allotted interim basic quantities, having regard to the basic quantities allotted to other producers in the area with the same number of cows; the interim allocation holds good until basic quantities are re-determined as above. Milk surplus to these basic quantities shall be paid for at realization prices.

Producer-retailers and producers of Certified and Grade A (T.T.) milk are exempt from parts of the Scheme. Full exemption is granted only to those selling milk in small quantities to persons in their own employment. Sales of small quantities to neighbours are not excluded.

The Board is also to be able to fix prices lower than the standard and surplus prices for milk which is of lower quality than that specified by the Board from time to time. Additional prices may be paid for level delivery milk, the variation not to exceed 5 per cent. above or below the basic quantity.

Contributions by producer-retailers and producers of

Certified and Grade A (T.T.) milk are based upon the number of cows and shall not exceed £1 per cow during the first year.

Except for a few minor points the rest of the Scheme is similar in principle to the other neighbouring Schemes already in operation.

The Argyll Milk Marketing Scheme

This Scheme was prepared primarily to extend the benefits of the Government loan to raise the price of manufacturing milk to some twenty or thirty cheese-makers on the islands of Islay, Gigha, and Coll. The machinery for the distribution of the loan was stipulated to be Milk Marketing Boards and, though those selling liquid milk are to be exempt from its provisions, this Scheme establishes the Argyll Milk Marketing Board. A cheese marketing scheme would not have qualified for the subsidy.

The Scheme was submitted on 8 June 1934. No objections were raised, but it is being reconsidered by the promoters because the Government subsidy is merely a loan and ends in April 1936. Further, the proposal of a national scheme to embrace all the Milk Marketing Boards into one organization has also raised doubts as to the advisability of establishing a Board since a scheme for the marketing of liquid milk would be of doubtful value to milk producers as a whole in the area.

The proposed Scheme applies to the county of Argyll with the exception of sixteen parishes included within the area of the Scottish Milk Marketing Scheme. A provisional Board of three named persons and two to be nominated by the Secretary of State for Scotland is proposed; in future Boards one member must have been nominated by registered producers in Islay and one by producers in Coll. The provisions for the election of members, registration of producers, meetings of the Board and so on, are similar to those in other Schemes, except that allowance is made for the difficulty of holding Board meetings, the members of which come from

different islands between which means of communication are far from assured. Any document signed by all the members of the Board is to operate as a resolution passed unanimously at a Board meeting.

Exemption from the Scheme is to be granted to producers who do not either manufacture milk into cheese on the farm or sell milk to a manufacturer of milk products; this excludes sales of milk for liquid consumption. The general powers of the Board include the usual provisions to determine the description of milk which may be sold, the prices at, below, or above which, and the persons to, or through the agency of, whom the milk may be sold. They may also determine the quantity to be sold by any registered producer. The Board may further require annual contributions, not exceeding 5s. per milk cow, from registered producers.

Financial provisions enable the Board to pay to registered producers, between the end of March 1934 and the beginning of April 1936, any money provided by Parliament for milk used in manufacturing any milk product. In the event of the whole or any part of any of that money becoming repayable to Parliament by the Board,¹ it shall become repayable to the Board by registered producers.

Unless the Scheme is finally put forward and passed by Parliament before the spring of 1935, it will be of no avail to producers, for production for cheese-making in the area is practically confined to the early summer months and 1935 is the second and last year of the present subsidy.

Reorganization Commission for Milk, Great Britain

In February 1935 the personnel and terms of reference of another Reorganization Commission for Milk were announced by the Secretary of State for Scotland and the Minister of Agriculture.

¹ See p. 13.

This had been expected. An organization so immense as the Milk Marketing Board might well require amendments to its constitution in the light of experience gained in working, and its relations with milk marketing boards in Scotland call, obviously, for careful consideration.

The members of the Commission are:

Mr. A. E. Cutforth, C.B.E. (Chairman).

Professor A. W. Ashby, M.A.

Sir Iain Colquhoun, Bt., D.S.O.

Sir John Orr, D.S.O., M.C., M.A., M.D., D.Sc., F.R.S.

Miss D. S. Tomkinson, M.A., J.P.

Its terms of reference are:

- (1) To consider the working of organized milk marketing in Great Britain under Milk Marketing Schemes and its incidence on production, distribution, and consumption, and to make recommendations for further improvement.
- (2) To consider and report on the extent to which, and the manner in which, organization could be facilitated by closer co-operation between the Marketing Boards concerned, or by the amalgamation of some or all of the schemes, including any schemes at present under consideration, or by other adjustments, and to prepare schemes for giving effect to any such adjustments.
- (3) To consider and report on the extent to which, and the manner in which, the organization of milk marketing in Great Britain could be facilitated by closer co-operation between Milk Marketing Boards in Great Britain and the appropriate authorities in Northern Ireland.

The Government of Northern Ireland have intimated their willingness to afford every assistance to the Commission.

2. Pigs and Bacon

The Pigs Marketing Scheme, Great Britain¹

The Pigs Marketing Scheme of Great Britain applies only to pigs sold for bacon by registered pig producers either to registered curers or to the Pigs Marketing Board. The Pigs Marketing Board, set up to carry out the Scheme, prescribes the contract terms under which bacon pigs are sold. Registered curers cannot, subject to certain exceptions, sell bacon from pigs produced in Great Britain unless those pigs were bought under contract confirmed by the Pigs Marketing Board. The contract requires the registered producer to deliver an agreed number of pigs in each month; it is the basis of import regulation. Total bacon supplies are stabilized at about 10,670,000 cwt., and the number of contracts, representing the home output of bacon, together with the probable Empire supplies, is required in order to fix the amount of foreign bacon which may be imported.

The Scheme came into full operation on 9 September 1933, but the first contract period did not start until 1 November. It was agreed, however, between the Bacon Marketing Board, representing the curers, and the Pigs Marketing Board, that contracted prices should be paid for bacon pigs between 15 September and 31 October.

The first Board was the provisional Pigs Marketing Board, consisting of seventeen members named in the original Scheme and two members nominated by the Minister, and it held office until 31 March 1934. The first annual General Meeting took place on 16 February, when about 350 out of about 140,000 registered members were present. At the meeting three special members were elected, Lord Radnor, Mr. Langford, and Major C. M. Higgins.

A new Board, consisting of eight district members elected

¹ The Pigs Marketing Scheme (Approval) Order, 1933, S.R. and O., 1933, No. 686.

by poll of registered producers, and the three special members took office on 1 April. Mr. J. A. Fox was elected Chairman and Lord Radnor Vice-Chairman. Remuneration was fixed at £600 a year for the Chairman, £400 for the Vice-Chairman, £270 for members of the executive and £200 for other members. It was decided to separate the offices of Secretary and General Manager, and in April Mr. David Black was appointed General Manager at a salary of £2,000, his position on the Board being filled by the election of another member. The next General Meeting is to be held on 15 March 1935, when one special member, Lord Radnor, retires and another election is held.¹

Amendments to the Scheme, 1934.

The Agricultural Marketing (Guarantee No. 1) Order, 1934,² was issued to enable the Pigs Marketing Board to guarantee payment by the Bacon Marketing Board of any sum which the latter paid out to registered curers before 21 September from the loan made by the Minister to the Bacon Marketing Board to reimburse their losses in the first contract period.³ The amendments gave the Board power to collect from producers, or to borrow, and to pay out the funds necessary for this purpose. The amendments were made under the powers conferred upon the Minister in section 4 of the Agricultural Marketing (No. 2) Act, 1933.

Some proposed amendments were circulated by the Board to registered producers at the end of the year which are designed to bring the Scheme into line with the Agricultural Marketing Act, 1933, and to make better provision for the conduct of elections.

The Board has been concerned in arranging with the Bacon Marketing Board the contract terms for the various

¹ Captain Morris was elected in Lord Radnor's place.

² *The Agricultural Marketing (Guarantee No. 1) Order, 1934. S.R. and O., 1934, No. 685.*

³ See pp. 118 and 183.

periods. The main features are summarized in the following notes.

First Contract Period, 1 November 1933 to 28 February 1934

Terms were announced in September and contracts for registration had to be returned to the Board by 12 October 1933.

The producer undertook to deliver a stated number of pigs of a definite weight class in each specified month. A tolerance of 10 per cent. above or below the contracted number was allowed in any one month or up to 5 per cent. over the four months; unavoidable causes of non-delivery released the producer from these obligations, while failure to deliver for other reasons rendered producers liable to a fine of £1 per pig in defect. Arrangements were made for Group contracts, agents being appointed by the Board to collect pigs from small producers at a commission of 1s. each pig. These contracts, in which the producer did not have to state in advance the class in which deliveries would fall, were made between the producer and the Pigs Board without a registered curer as a third party to the contract.

Payment was made on the basis of classes and grades, determined according to dead weight, maximum depth of fat on the shoulder, and minimum belly fat measurement; the Board employs about 156 full-time and part-time graders who are also responsible for checking the weights.

There were four weight classes, ranging from 7 score to over 10 score 10 lb., the first three of which were subdivided into Grades A, B, C, D, and E according to fat measurement. Grade C pigs in each class were known as 'basic' pigs and the price of a Class 1, Grade C pig as the 'basic price'. In each class, except Class 4, Grade A pigs received a bonus of 1s. per score, and Grade B pigs 6d. per score, over the price of the respective basic pig; Grade D and Grade E pigs suffered a reduction of 3d. and 6d. per score respectively from the

Grade C price in each class except in Class 4 where prices did not vary according to Grade. The prices payable for Class 2, Class 3, and Class 4 pigs were 6*d.*, 1*s.*, and 1*s.* 6*d.* below Class 1 pigs.

When the ascertained price of a standard ration of feeding stuffs was 7*s.* 6*d.* per cwt., to which it approximated during the first contract period, the minimum basic price was 12*s.* per score. Prices paid varied from 13*s.* for Class 1, Grade A to 10*s.* 6*d.* for Class 4.¹ Black pigs were subject to a reduction of 6*d.* per score. From these prices the curer deducted 1*s.* 5*d.* per pig, of which 1*s.* 2*d.* per pig was paid to the Pigs Marketing Board and 3*d.* expended on insurance against loss of carcass through condemnation, &c., the curer adding another 3*d.* per pig for this purpose. The fee for registration of the contract with the Pigs Marketing Board was 2*s.* 6*d.*

During this contract period the producer was, in principle, guaranteed a price estimated to cover his cost of production, which varied with the price of feeding stuffs. The prices rose or fell 3*d.* per score for every rise or fall of 3*d.* per cwt. in the price of a standard ration, as determined by the Ministry of Agriculture.²

The market prices of bacon did not justify these prices for pigs and losses were incurred by the curers. Accordingly, a Government loan of about £160,000, repayable by the Pigs Marketing Board, was advanced to reimburse them.³

Contracts were made for some 620,000 pigs, of which about 105,000 were under Group contracts between the Board and small producers. Allowing for the Northern Ireland output, this rate of production represented about 3,000,000 cwt. of bacon a year, an estimated increase of about 70 per cent. over the 1932 level. Empire supplies were esti-

¹ Prices were free on rail, the curer paying transportation costs from that point.

² Barley meal 65 per cent., weatings 25 per cent., protein and mineral content 10 per cent.

³ See p. 183.

mated at the rate of 1,333,000 cwt. a year. Reductions in foreign bacon imports had been imposed on the assumption that home output would be about 2,000,000 cwt., and the unexpected increase led to a further cut of 16 per cent. in foreign supplies, about 1,979,330 cwt. for the period 10 November to 28 February.¹

However, the total number of home contracts was subsequently reduced to 577,596 and the number actually received during the period was 486,382, a deficiency of 16 per cent.² The deficiency was largest in February when only 98,146 pigs were delivered instead of 148,197. Actual foreign imports amounted, however, to 2,043,373 cwt., an excess of 106,354 cwt. over the quota, which almost compensated for the decreased home output.

Returns by the Bacon Marketing Board indicated that the number of pigs contracted in the first period was approximately 80 per cent. of the total needed to fill the existing curing establishments, but that while Wiltshire-cure factories had mostly obtained all the pigs they needed, curers needing heavier classes of pigs were short of supplies.³ Consultation between the Boards was arranged to procure more equitable distribution by using the Group Contract pigs and by voluntary assignment of pigs by curers who had more than 80 per cent. of their requirements to those who had less.

Second Contract Period, March to December 1934

The terms of the second contract became known about 14 February and producers were asked to return their contracts for registration by 21 February. Negotiations between the Pigs and Bacon Marketing Boards had been very prolonged and finally the Wyndham Portal Committee was brought into consultation, and the date for registration was extended to 12 March.

¹ See p. 51.

² See Appendix, Table I, p. 377.

³ *Journal of the Ministry of Agriculture*, vol. xl, No. 9, p. 852. December, 1933.

Grades were very similar to those in the first contract except that minimum belly measurement for Grade C pigs was raised $\frac{1}{8}$ th of an inch in Classes 1, 2, and 3 from March to August and a further $\frac{1}{8}$ th of an inch from September to December. Specific measurements for Grade E pigs were dropped so that Grade E included any pig accepted for curing but which was ineligible for other grades. The prices for basic pigs in Classes 2, 3, and 4 were *6d.*, *9d.*, and *1s. 3d.* per score below the Class 1 basic pig price. Bonuses for Grade A and Grade B pigs remained at *1s.* and *6d.* per score over the Grade C price in each class, while deductions of *6d.* and *1s.*, instead of *3d.* and *6d.* in the first contract, from the basic pig in each class were made for Grades D and E. Pigs in Class 4 were not subject to Grade bonus additions or deductions.

Price terms for March and April were similar to those in the first contract period, but they differed radically for the months May to December. In the first two months, the basic price, with a standard ration at *7s. 6d.* per cwt., was *12s. 6d.* per score, subject to a deduction of *6d.* per score as a contribution to the repayment of the Government loan to curers. Prices were still to vary with variations in the price of feeding stuffs.

For the remaining months the principle of price determination was altered to take account of the market price of bacon and the realization value of offals, as well as the price of feeding stuffs. Curtailment of imports had not resulted in a sufficient rise of bacon prices to enable curers to guarantee to the farmer his estimated cost of production. The losses which they had incurred in the first contract period made it imperative to take into account the price that bacon would bring on the market.

The Boards agreed upon an 'initial price' for pigs and bacon of *11s.* per score and *85s.* per cwt. respectively. For every *3d.* rise or fall in the cost of the standard ration above or below *7s. 6d.* per cwt., a corresponding variation of *3d.* per

score was made in the initial price of the pig and of 1s. 9d. in the initial price of bacon. The initial bacon price also varied inversely as the realization value of offals from a 7 score pig varied from 10s. Thus if feeding stuffs were 8s. 6d. per cwt. and offals 9s., then the initial price of the pig was 12s. per score and of bacon 93s. per cwt. $(85s. + 1s.) + (4 \times 1s. 9d.)$.

But there was no guarantee that the curer could get 93s. for his bacon; it was felt, on the other hand, that if bacon was higher than that, the producer should gain some of the higher prices. A new 'co-partnership' system was introduced whereby any 'profit' or 'loss', as represented by the difference between the initial price of bacon and the realized market value, was shared between the producer and the curer in a 50 : 50 ratio. For every difference of 1s. 2d. in the price of English bacon above or below the initial bacon price, there was a corresponding increase or reduction of 1d. per score in the price of the pig.

In the last four months of the contract, arrangements were made by which the producer and curer were to divide the profit or loss in a 75 : 25 ratio when the realization price of bacon was more than 13s. per cwt. above the initial price.

The prices for a Class 1, Grade C pig during the ten months of the second contract period ran from 12s. in March down to 11s. 1d. in September, and up to 12s. 1d. in December.

Deductions for insurance against risk of condemnation of carcass, &c. were increased from 3d. to 5d. per pig, the levy of 1s. 2d. being left as before.¹ Black or mainly black pigs were still subject to a 6d. deduction.

Apart from the price, the conditions of the contract were very similar to those of the previous one. A special Wiltshire Contract was provided, in addition to the ordinary and Group contracts, to meet the need of producers of pigs for Wiltshire

¹ The question of compulsory insurance with one company was referred to the Committee of Investigation of Great Britain. See p. 174.

cure, which provided for the delivery of Class 1 pigs only, 7 score to 8 score 10 lb. dead weight.

Special provisions were made for transport arrangements. The Pigs and Bacon Marketing Boards and the railway com-

Monthly Prices of the Standard Ration and of a Basic Pig, and the Levy during the Second Contract Period

Month	Price of stan- dard ration per cwt.	Basic pig price per score	Levy per score
	s. d.	s. d.	d.
March . . .	7 4	12 6	6
April . . .	7 3½	12 6	6
May . . .	7 3	11 11	2
June . . .	7 3	11 8	3
July . . .	7 3½	11 7	3
August . . .	7 6	11 6	4
September . . .	7 10½	11 5	4
October . . .	8 5½	12 2	5
November . . .	9 0½	12 0	4½
December . . .	9 3	12 1	4

panies agreed on a flat rate of 1s. 8d. per pig, subject to an undertaking that all pigs, for journeys over 5 miles, were to be conveyed by the railway companies, either by road or rail. Under exceptional circumstances, to be considered by a special committee, producers and curers were able to make their own arrangements for distances over 5 and up to 15 miles. The flat rate was approved on 5 April by the Railway Rates Tribunal.

Investigation showed that the average railway haul of pigs had been 116 miles and that the railways were carrying less than half of the pigs. As a result of the new agreement it was assumed that approximately nine-tenths of the total number of contracted pigs would be carried by the railways.

The number of pigs contracted for the ten months was 1,323,176, of which 63,288 were from producer-curers; direct contracts totalled 1,068,567 while Group contracts amounted to 248,962. The bacon equivalent of these contracts was esti-

mated at 1,701,030 cwt. This rate of production was about 6 per cent. lower than in the preceding four months. The monthly distribution of deliveries was very uneven; March began the period with 45,825 and the figure rose steadily to the maximum of 182,189 in October, falling to 163,384 in December.¹

The contracts for the last two months of the year were 12 per cent. higher than in the corresponding period of 1933. In addition to the above 1,701,030 cwt., the output of exempted curers was estimated at 68,000 cwt., while that of Northern Ireland was about 484,300 cwt. The total United Kingdom output for the ten months was thus 2,253,330 cwt., and to maintain an annual supply of 10,670,000 cwt., imports were to total 6,773,700 cwt. of which 1,340,400 cwt. were allocated to the Dominions.² Actual accepted deliveries totalled 1,231,963, or 7 per cent. less than the number contracted. March deliveries were 38 per cent. in excess of contracts while July receipts showed a 15 per cent. deficiency.¹

Third Contract Period, January to December 1935

The terms of the third contract were available at the end of October and the closing date for receipt of contracts was fixed for 14 November, the time being extended subsequently to 20 November. The terms were very similar in principle to the previous ones.

The Classes and Grades were altered slightly and the price difference between Class 1 and Class 2, which was previously 6*d.* per score, was reduced to 3*d.*, raising the Class 2 and 3 prices by 3*d.* per score. The difference between basic pigs in Class 1 and 4 became 1*s.* per score instead of 1*s.* 3*d.* as in the previous contract; the bonus additions and deductions of 1*s.* and 6*d.* between grades remained as before, pigs in Class 4 being subject neither to additions nor deductions.

The co-partnership principle was maintained, pig prices

¹ See Appendix, p. 377.

² See p. 52.

being calculated on the basis of feeding-stuff prices and the price of bacon. The formula is, however, more complicated and aims at a greater adherence to the profit and loss principle and a closer linking than before of pig prices to bacon prices. The penalty of 6*d.* per score on the black pig is removed unless the pigmentation shows after dressing.

The compulsory insurance scheme is dropped and in its place the curers pay 1*d.* per score to the producer, who is now left to insure on his own account or bear the risk. The Board was able to arrange that certain insurance companies would issue policies to registered producers at 1*s.* 6*d.* per pig for the full cover, and 1*s.* 2*d.* per pig including head but excluding offals.

The compensation loan to curers for losses incurred in the first contract period was paid off by the end of January 1935, and no further deductions were necessary in 1935 for this purpose.

Transport arrangements are altered slightly, though the principle of a flat rate is maintained.

A new feature in the third contract was the attempt to meet the curers' difficulties arising from the unequal monthly distribution of contracts. Producers must now contract to deliver *not less* than 25 per cent. of their total number of contracted pigs within the four months January to April, and *not more* than 45 per cent. in the four months September to December. Secondly, bonuses will be paid to producers on all contract pigs during January, February, March, and April, the bonus coming from a fund to which curers will contribute 2*d.* per pig on all contract pigs accepted by them during the year.

Three types of bonus, based on the percentage of a producer's total contracted pigs delivered in January to April, will be paid on pigs delivered by the producer during these four months.

As before, the contract can be rendered null and void if the

restriction of imports be not maintained, on a fortnightly basis. And, if, after consultation between the Boards, either Board determines that the contract pig prices are uneconomic either for producers or curers, the contract may become void after an interval of three months unless an agreed price-change is made, and certified by an independent person appointed by the President of the Institute of Chartered Accountants.

The Bacon Board have the right to refuse the contract if it considers that the number of pigs contracted is not sufficient in every month to give an economic basis of factory working, provided notice of such refusal is given to the Pigs Marketing Board within four days of the notification to the Bacon Board of the total number of pigs contracted.

At a meeting of the Pigs Marketing Board on 3 December it was announced that 1,670,000 pigs had been contracted for the year, being practically the same as in the previous period, and the Bacon Marketing Board, in the exercise of their right, declined to proceed with the contract unless another 450,000 pigs were promised. Accordingly, the Pigs Marketing Board invited farmers to enter into supplementary contracts for registration by 22 December, and about 112,000 pigs were obtained. It is said that the curers' difficulty arose from unequal distribution of the pigs among them, so that many had not enough for economic factory working. The supplementary contract was between the producer and the Pigs Marketing Board, and thus the Board could level up supplies between curers. The number of supplementary contracts was sufficient to induce the Bacon Marketing Board to accept the 1935 contract.

In January it was announced that contracts had been received for about 1,800,000 pigs and the curers were still asking for a further 240,000 pigs for delivery from May until the end of the year. A second supplementary contract was issued, returns to be registered before 15 April.

The Bacon Marketing Scheme, Great Britain¹

The Bacon Marketing Scheme is closely linked with the Pigs Marketing Scheme; it establishes a Board elected by registered bacon curers and, in principle, provides that registered curers may not sell bacon from pigs produced in Great Britain except those bought from registered producers under contracts confirmed by the Pigs Marketing Board. Exemption from this provision is granted for bacon from pigs produced by the curer himself, for bacon made from pigs or pork imported for that purpose, or from pigs which the curer has bought in the open market to make up for deficiencies in *home contract pigs*.

The Scheme came into full operation on 9 September 1933, the provisional Board consisting of fifteen members named in the Scheme and two persons nominated by the Minister. The new Board of fourteen members was elected at a meeting on 13 February to take office on 1 April; remuneration amounting to £2,800 was voted to the Board for its services for the year beginning 1 April 1934, and remuneration at the same rate for the provisional Board from 6 July 1933 to 31 March 1934. Two members, the Hon. Jasper Ridley and Mr. W. Patrick Spens, K.C., M.P., were subsequently co-opted by the Board after consultation with the Market Supply Committee.

The Bacon Marketing Board has primarily been concerned in the negotiation of the contract terms for bacon pigs with the Pigs Marketing Board, as already described. Jointly with the Pigs Marketing Board, the Bacon Marketing Board has put forward proposals for a Pig Industry Development Board.²

Amendments to the Scheme during 1934.

The Minister made an Order on 29 June 1934 which amended the Scheme to provide for the co-option to the

¹ The Bacon Marketing Scheme (Approval) Order, 1933, S.R. and O., 1933, No. 683.

² See pp. 127-30.

Board of two members by the elected members after consultation with the Market Supply Committee; for the first year from 31 March 1934 the co-opted members are subject also to the approval of the Minister.¹

The Scheme was also amended by Order of the Minister to enable the Board to enter an agreement with the Pigs Marketing Board to indemnify curers for losses suffered in the first contract period, and to enable them to pay the compensation to individual curers. A further amendment gave the Board powers to increase the amount of the levy on curers, by an amount not exceeding 10s. per pig, provided that the curer was able under the contract to deduct the increased contribution from the price payable to the pig producer.²

Further amendments, to which objections were raised, were put forward by the Board to enable them to determine the quantity of bacon which might be sold by any curer in any year, and to regulate the amount of bacon produced by a curer from pigs produced by himself. Having received the report of an inquiry held to consider the objections, the Minister has decided to ask Parliament to approve the proposed amendments.

The Pig Industry Development Board

The Report of the Reorganization Commission for Pigs and Pig Products attached great importance to the establishment of a Pig Industry Development Board; it recommended that the Board's functions should include the administration of the home quota, the control of new factory construction and extension, formulation of a common policy for the industry, and arbitration between the Pigs and Bacon Marketing

¹ The Bacon Marketing Board (Co-opted Members) Order, 1934, S.R. and O., 1934, No. 734.

² The Bacon Marketing Scheme Amendment Order, 1934, S.R. and O., 1934, No. 649.

Boards in the event of a break-down in their negotiations over contract terms and prices.

The Agricultural Marketing Act, 1933, made provision for the formation of such Boards. Schemes may be submitted by the Boards administering two or more marketing schemes, one at least of which regulates the marketing of the secondary product, while the other regulates the marketing of the agricultural product from which the secondary product is wholly or partly manufactured. If satisfied that the Scheme will conduce to more efficient marketing, the Minister, after consultation with the Board of Trade, may lay a draft of the Scheme before Parliament and, if approved, he shall make an order bringing it into force. There is no necessity to hold a public inquiry into any objections raised to a Development Scheme.

A draft scheme for the establishment of a Pig Industry Development Board was prepared by the Pigs and Bacon Marketing Boards and submitted to the Minister early in April.

The Scheme provides for the setting up of a Board of nine members, of which the chairman and two others are nominated by the Minister, three elected annually by the Bacon Marketing Board and three by the Pigs Marketing Board.

The main object of the Scheme is the licensing of bacon factories. No person shall produce bacon in any premises in Great Britain unless he is exempt from registration under the Bacon Marketing Scheme or is licensed by the Development Board. The Board may also determine what other classes of producer or production may be exempted.

The Board may attach to licences such conditions as they consider necessary for promoting efficient production of bacon in the licensed premises or for preventing or reducing excessive production of bacon. Licences will last for two years or more. They may be revoked by the Board, but they shall not be refused within two years for premises which have been used for bacon production at any time during the six

months before the submission of the scheme. Exception to this undertaking is made if the Board considers that the premises in question are not required, if the situation of the premises is unsuitable, or if the producer's licence has been revoked.

If the Board refuses an application, it must furnish the applicant with a written statement of the grounds of their refusal. Compensation may be paid to any applicant who is aggrieved by the refusal of the Board to grant the licence or by any condition which the Board attaches to the licence. The Board shall determine the class of cases in which compensation shall be paid. It may also purchase and dispose of premises in order to prevent, eliminate, or reduce inefficient or excessive production of bacon.

The Scheme provides, also, for the exercise by the Development Board of certain powers held by the Pigs and Bacon Boards; these powers do not become operative, however, except by a resolution of each of these Boards that it is expedient that they should be exercisable by the Development Board. Subject to this provision the new Board may determine the kinds, varieties, or grades of, and the prices at, below, or above which, pigs may be sold; the manner in which pigs may be insured; the power to confirm contracts for the sale of pigs; the kinds, varieties, and grades of bacon, and the quantity of each kind, variety, or grade that may be sold; the exemption of sales of any specified class of bacon from the Scheme; and the manner in which bacon is to be graded or marked.

Certain consequential modifications of the Pigs Marketing Scheme 1933 and the Bacon Marketing Scheme 1933 are included if the Development Board should assume these powers.

The Bacon and Pigs Marketing Boards shall contribute not more than 1*d.* per pig, on all contracted pigs delivered, to defray the expenses of the Development Board.

Objections to the Scheme had to be lodged by 22 May 1934; these were received from eight different sources, the most significant being the objections raised by the National Farmers' Union against the provisions which might handicap the setting up of curing establishments by the Pigs Marketing Board and the transference, in Part IV, of some of the powers of the Pigs Marketing Board to the Development Board.

Objections were also raised on various grounds by the Federation of Grocers' Associations, particularly that no provision was made for consultation with the retail trade to ascertain 'the demands of consumers of bacon'; they recommended the appointment of a Retailers' Advisory Committee, similar to the one established by the Potato Marketing Board.

Other objections were put forward by various interests, and all have been submitted to the Minister.

The Northern Ireland Pigs Marketing Scheme

The Scheme was prepared by the Minister of Agriculture for Northern Ireland under the Agricultural Marketing Act (Northern Ireland), 1933.¹ Provision is made for the formation of a Pigs Marketing Board of fourteen members, eleven elected by registered producers and three nominated by the Minister of Agriculture. The Board have power to determine the grade of pigs which, and the prices at which any particular grade, may be sold. Their decisions apply not only to registered producers but also to those who remain outside the Scheme. In addition, the Board can prescribe contract terms between registered producers and the curers. They may also buy and sell pigs.

The Board must buy any live pigs offered to them by registered producers at the current minimum standard price fixed by the Board, less a deduction of not less than 2s. per pig for marketing charges. Since quotas have been fixed for

¹ The Pigs Marketing Scheme (Northern Ireland) (Approval) Order, 1933. S.R. and O. of Northern Ireland, No. 93, 1933.

exports of bacon and bacon pigs from Northern Ireland to Great Britain, and there is, therefore, no certainty of selling pigs in the open market, this undertaking is a considerable incentive to registration, for it assures the registered producer a certain market; there is no undertaking to buy from non-registered producers. The Board also have the power to determine the quantity of pigs which may be sold by any producer, the basis of quota allocation being previous production. Contributions may be levied on producers for the costs of operation.

The Scheme aims principally at the prevention of undercutting, price control, and the guarantee of a market to registered producers.

Amendments were made during 1934 for elections of members, auditing accounts, and the powers of the Board to regulate insurance in their contracts.¹ Another amendment made registered dealers, as well as curers, responsible for deducting producers' contributions to the Scheme and for paying them to the Board, but a subsequent amendment relieved them of this responsibility.²

A provisional Board, named in the Scheme, held office from 1 October 1933 to 31 March 1934. An election was held in February, and the new Board took over on 1 April. The Board have been concerned mainly in the arrangement of price and contract terms with the Bacon Marketing Board of Northern Ireland.

A standard price was negotiated with the Bacon Marketing Board for the two weeks before the Scheme came into full operation on 1 October 1933. The price of dead pigs weighing between 1 cwt. 1 qr. and 1 cwt. 3 qr. 14 lb. deadweight was 57s. per cwt., deductions or additions of 1s. per cwt. being

¹ The Pigs Marketing Scheme (Northern Ireland) (Amendment) Order, 1934.

² The Pigs Marketing Scheme (Northern Ireland) (Amendment) (No. 2) Order, 1934.

made for inferior or superior quality pigs. Deductions were also made for heavier grades. A levy of 2s. per pig was contributed for the operation of the Scheme.

For the next five months, October to February, the standard price for dead pigs was fixed at 58s. 6d. per cwt., and from March to May at 65s. As in Great Britain, the curers were involved in a loss through the failure of bacon prices to rise sufficiently to enable them to pay these prices. In the initial months the losses, for which the curers were to be reimbursed, amounted to £26,664 5s., at 5s. per pig compared with 7s. 5d. in Great Britain. A loan was made by the Government and repayment will be made by means of a levy extending over fifteen or eighteen months, 1s. per pig being paid from 16 September onwards.

Subsequently, prices were fixed, for shorter periods, on a sliding scale similar in principle to the formula used in Great Britain; it took into account feeding-stuff prices, prices of bacon and hams, and the realization value of offals. 'Initial' prices were fixed; when feed was 6s. 9d. per cwt., bacon and hams 95s. per cwt., and offals from a 185-lb. pork carcass 11s. 5d., then the dead pig or pork price was to be 55s. per cwt. Every 3d. rise or fall in the price of feed raised or lowered the initial price of pork by 1s. 2d.; every change of 1s. 2d. in the price of pork brought a corresponding change of 2s. per cwt. in the initial price of bacon; and for every 2s. per cwt. by which the market price of bacon and hams was above or below the initial price, initial pork prices were raised or lowered by 7d. per cwt.¹ In this way, the risks of fluctuations in feeding-stuff or in bacon prices were divided between the producer and curer.

The standard prices in the various months since the Scheme

¹ When the difference between the initial price and the realization price of bacon and hams exceeded 8s. per cwt., then 10½d. per cwt., instead of 7d., was added to or deducted from the initial price of pork or dead pig.

started are shown in the following table, together with the price paid by the Board for live pigs and the open-market price. These standard prices were about 6s. 7½d. per dead

*Pig Prices in Northern Ireland, October 1933 to December 1934**

	Standard price, per cwt.		Levy per pig	Live pig sales	
	1 cwt. 1 qr. 14 lb. to	1 cwt. 2 qr. 22 lb. to		Belfast market equivalent deadweight	Sold to Board per cwt.
	1 cwt. 2 qr. 21 lb.	1 cwt. 3 qr. 14 lb. (deadweight)			
	s. d.	s. d.	s.	s. d.	s. d.
Oct.	58 6	53 6	2	47 8	43 0
Nov.	58 6	53 6	2	49 10	43 0
Dec.	58 6	53 6	2	55 1	43 0
1934					
Jan.	58 6	56 0	2	63 7	43 0
Feb.	58 6	56 0	2	71 10	43 0
Mar.		65 0	2	69 1	43 0
Apr.		65 0	2	63 9	43 0
May		65 0	2	57 5	43 0
June		56 0	2	54 2	44 6
July		55 0	2	51 4	44 0
Aug.		53 10	2	54 7	43 0
Sept.		53 10	2	54 0	43 0
Oct.		57 4	2	50 4	46 0
Nov.		57 4	2	..	46 0
Dec.		56 2	4	..	46 0

* Freight and carriage charges are payable by the curer.

wt. or 10s. 9d. per pig less than the comparable prices in Great Britain. Marketing charges and levies were 5s. per pig.

During the first few months of the Scheme the Board had no control over the live pig trade; the prices of pigs on the open market, shown in the above table, rose out of parity with standard prices in the early months of the year owing to the high prices for open-market bacon pigs in Great Britain, resulting from over-contracting and bidding for pigs with which to fulfil contracts. Curers in Northern Ireland

experienced difficulty in getting the supplies necessary to fill the export quota, thus endangering future allocations to Northern Ireland. Accordingly, arrangements were made to restrict live pig exports to about 500 pigs a week until curers were able to obtain their requirements.¹ Restrictions were in force from 5 March until 12 May; export quota allocations were made to individuals on the basis of their exports during the four months ending 28 February.

Another problem arose from the expansion of the live pig trade. The principal market for Northern Ireland production is for roll bacon and hams, and this turned out to be limited. Production increased by about 40 per cent. between 1933 and 1934, and as much of it had to find its outlet in the live pig market, the expansion was making the Board's task of price stabilization and control almost impossible. So the Board took over the live pig trade as from 1 November. Producers were not allowed to sell live pigs between 1 cwt. 2 qr. and 2 cwt. 2 qr. 21 lb. except to the Pigs Marketing Board. Breeding stock, live pigs sold on contracts registered with the Board to Northern Ireland curers, and pigs sold to persons in Great Britain and exported on export permits or quota certificates, were exempted from these provisions.

This control of the live pig market has enabled the Board to maintain a higher internal price level for all pigs sold in Northern Ireland. Pig prices in Great Britain are normally about 10s. per pig above those in Northern Ireland, and so long as the market remained free, this 10s. difference would exist. About one-quarter of the Northern Ireland output is exported as live pigs. The Board considered, therefore, that it would enable them to maintain higher prices on the domestic market if they took the surplus off the market and

¹ The Marketing of Pigs (Registration of Dealers) Regulations (Northern Ireland), 1934, S.R. and O. of Northern Ireland, No. 16, 1934. The Agricultural Marketing (Removal of Pigs) Regulations (Northern Ireland), 1934, S.R. and O. of Northern Ireland, No. 27, 1934.

sold it, even at a loss, in Great Britain. The higher the domestic prices obtained, the greater would be the loss on selling abroad, but so long as the larger part of the total sales was on the home market, it would pay them to sell at a loss and recoup it by a levy. Losses on these sales totalled about £8,500, or 8*s.* 6*d.* per pig, but the Board calculated that they obtained about £28,250 more from the curers; the autumn glut might have lowered all prices in Northern Ireland by so much as 13*s.* per pig. A levy of 2*s.* per pig was raised on all pigs sold after 19 November, to recoup the Board for their trading losses; this was reduced to 6*d.* on 24 December as it was considered unfair that the levy should fall on those who were not responsible for the autumn glut. In effect, this practice results in differential payments for pigs delivered in different months.

From the start of the Scheme until 19 November, the levy on all pigs for administrative expenses was 2*s.* per pig, with an extra 3*s.* per pig on live pigs to cover weighing, transport, insurance, commission, &c. On that date the administrative levy was reduced to 1*s.* per pig, but a temporary levy of 1*s.* per pig was imposed to indemnify the curers for their losses from 16 September to 31 December 1933, and also 2*s.* per pig for the trading losses described above. The 3*s.* marketing charge was still made on live pig sales. The trading levy was reduced to 6*d.* on 24 December, and the marketing charge was reduced to 2*s.* 6*d.* in January.

During the first fifty weeks of 1934, the number of pigs bought, dead and alive, for curing totalled 401,774, and 74,514 were exported; the corresponding figures in 1933 were 360,318 and 62,201.

After one year's operations it was considered that it might be necessary to control the expansion of production and, more especially, to spread production more evenly over the whole year. Secondly, that unlimited expansion of curing-establishments would not be in the interests of the industry

as a whole; thirdly, that, as some curers had not observed the price agreements, prices should be made statutory; and, fourthly, that pig and bacon grading, which was more or less voluntary, should be made compulsory.

At the end of the year a further Act was passed, giving the Ministry of Agriculture various powers, one of which is to regulate production by determining the quantity of bacon or of any description thereof, which may be produced by a licensed bacon curer.¹ Subject to certain conditions, this quantity shall not be less, for any period of the year, than the amount produced in the corresponding period of the year commencing on 1 November 1933.

Before granting a licence to a new curer, the Ministry must refer the application to a Pig Industry Council, established by the Act, which may report against the granting of the licence if necessary to avoid or to reduce an excessive production of bacon, or it may attach certain conditions to the grant of the licence.

Provisions are also made for the establishment of a Pig Industry Council for Northern Ireland, consisting of three members appointed by the Minister of Agriculture, one of whom shall be chairman; three members appointed by a Bacon Marketing Board, if in existence, or, if not, elected by licensed bacon curers; and three members appointed by a Pigs Marketing Board, or failing such, elected by pig producers.

The duties of the Council will be to determine the prices and the terms on which pigs may be sold by the producer, but no such determination shall have effect except with the approval of the Ministry of Agriculture. This section of the Act supersedes the provisions of the Pigs Marketing or Bacon Marketing Schemes covering prices and terms of sale.

Any person who now sells or buys pigs otherwise than at the Council's prices or on its terms will be guilty of an offence.

¹ Agricultural Marketing (Pig Industry) Act (Northern Ireland), 1934.

The Act makes certain amendments to the Pigs and Bacon Marketing Schemes for the payment of contributions or levies due to the marketing boards. The Ministry is also enabled, by regulation, to prescribe the persons by whom, the manner in which, and the places at which, pigs or bacon are to be marketed.

The Act came into force as from 1 January 1935, except for the section dealing with the duties and powers of the Pig Industry Council which had not then been constituted.

The Northern Ireland Bacon Marketing Scheme

As in Great Britain, the bacon curers have formed a marketing Board, their principal occupation up to the present having been the negotiation of contracts with the Pigs Marketing Board.

The Scheme came into force on 1 October 1933, the provisional Board consisting of fourteen members named in the Scheme.¹ The first election was held in February 1934, at which eleven representatives of registered curers were elected, six by 'large' producers, three by 'medium' producers, and two by 'small' producers. Three members appointed by the Minister and the eleven elected members constitute the Board of fourteen. The new Board took office on 1 April 1934. Future elections will be held in the February of every second calendar year.

Exemption from registration under the Scheme is granted to curers who do not use any form of mechanical power for producing bacon, provided not more than 40 cwt. of bacon are put into cure in any two consecutive months.

The Board has powers to regulate sales by any registered producer, by determining the description of bacon which may be sold; it was also able to fix the quantity which may

¹ The Bacon Marketing Scheme (Northern Ireland) (Approval) Order, 1933. S.R. and O. of Northern Ireland, No. 99, 1933.

be sold by any producer, based on production in some past period. They may also exempt from these provisions certain descriptions or sales of bacon.

The Scheme did not enforce registered curers to pay the prices determined by the Pigs Marketing Board and agreed to by the Bacon Board, but provisions have been included in the Agricultural Marketing (Pig Industry) Act, passed at the end of 1934, to make these prices statutory.¹ This Act also transfers from the Bacon Board to the Ministry of Agriculture the duty of allocating bacon quotas to individual curers.²

3. Live Stock

Reorganization Commissions for Fat Stock

England and Wales.

The Reorganization Commission for Fat Stock for England and Wales was appointed by Mr. Elliot in December 1932.³ It produced a unanimous report which was published on 16 April 1934.⁴

The Commission did not attempt to produce a complete and detailed marketing plan for the entire industry, but it indicated some of the more essential measures of reorganization and lines of development. Consideration was given to the similarity of the problems facing both Scottish and English producers, and it was thought advisable to draft the Scheme so that it could be converted, if desirable, into a scheme for Great Britain.

The recommendations and proposals may be divided into three categories—restoring remunerative prices, establishing an efficient live-stock marketing system, and raising the quality of home-produced live stock and meat.

¹ See p. 29.

² See p. 136.

³ See *The Agricultural Register*, 1933-4, pp. 15 and 70.

⁴ *Report of the Reorganization Commission for Fat Stock for England and Wales*, Economic Series, No. 39. Ministry of Agriculture and Fisheries, 1934.

After surveying the volume of meat supplies and their seasonal variation in recent years, the Commission states that the general downward course of live-stock and meat prices is closely associated with the increase in meat imports, the pressure being particularly marked during the autumn when the home supply is heaviest. The Commission enumerates the steps taken by the Government quantitatively to regulate imports, and recommends that regulation should be extended to cover all classes of meat, whether Empire or foreign, and that the machinery of regulation should be made more effective, for they found that there had been considerable deviations from the supply arrangements.

The Report says that, within broad limits, meat supplies are interchangeable and therefore total quantities should be regulated so as to ensure stable conditions in the market. But there are seasonal variations in both supply and demand, and it was found 'difficult, therefore, to recommend a figure at which supplies of the different classes of meat should be maintained'.

The Commission maintains that the contract principle, as adopted for milk and bacon pigs, is not applicable to other live stock and that producers could not guarantee their output for longer than three months ahead, a period too short for efficient import regulation. It recommends that the volume of home-produced meat, which would be a factor in determining the maximum of import supplies, should be estimated on the basis of a half-yearly live-stock census and a quarterly forecast of sales for slaughter. Special steps should be taken to regulate imports in the last quarter of the year so that there should be a greater demand for home-fed cattle at that season, but at the same time the consequent price-rise should not be sufficient to reduce the normal premium for winter-fattened cattle prices and thus destroy the incentive to winter feeding.

The Report goes on to suggest that if such supply regulations

should fail to restore the prices of home-produced beef to a reasonable level, supplementary measures should be considered: (a) an import duty, (b) an import Board, (c) a direct subsidy, or (d) a levy on the lines of the Wheat Act. But the Commission states that 'it would be an abuse of supply regulation so to restrict supplies for the purpose of increasing prices in the interests of home producers as to deprive the nation of a sufficiency of butcher's meat'.

On the assumption that the full benefit of higher prices would not accrue to the producer without greater marketing efficiency, the Commission outlines schemes for marketing reorganization and for the further provision of market intelligence.

The Commission found it impossible to set a definition of 'fat stock' as given in the terms of reference, and so they prepared a scheme to cover all cattle, sheep, and pigs, whether fat or store. Moreover, the faults of the existing system—excessive numbers of markets, auctioneers, and dealers, the inefficient use of methods of sale, the lack of market intelligence and of knowledge of supplies and prices, the blind movement of stock in search of a reasonable market, the fluctuations in supplies, and the credit problem—are common to both the fat and store trade.

The main proposals aim at the improvement of existing methods and agencies rather than any radical changes; rationalization should be gradual, involving the co-operation rather than the replacement of the parties at present engaged in the trade. The Commission had been urged to include provisions for the fixing of minimum or upset prices; such recommendations had been put forward in a scheme drawn up by the National Farmers' Union in 1932, but it felt that any scheme to impose minimum prices would fail because home producers have no monopoly of the market and that there is no alternative economic outlet for fat stock other than the fresh meat market.

In the main, the proposals are designed to encourage sales at public auction direct to the meat market on a grade or deadweight basis, rather than by private treaty on the farm or at market, or on commission, or through dealer slaughtermen.

Auction methods should be improved by concentrating sales in selected markets, thus combating the risk of 'rings', increasing the turnover of markets, and reducing costs.

Better market intelligence service should include a half-yearly instead of an annual census of live stock, quarterly forecasts of sales, more detailed sales returns from auctioneers, dealers, butchers, and the like, information on crop and pasture conditions, supply conditions abroad, and the trend of demand at home.

The third group of the Commission's proposals aims at raising the quality level of home-produced live stock and meat. Their recommendations include pasture improvement, production of better store stock, expansion of the Ministry's Premium Bull scheme, greater control of disease, particularly to avoid dairy cow wastage, cattle recording, warble fly control, and extension of the Ministry's Premium Ram scheme.

Two further sections of the Report deal with slaughtering problems and the pork market. The Commission favour further centralization of slaughtering, but the development should not be precipitate; a National Slaughter-houses Commission is recommended as an advisory and planning, but not executive, body;¹ compulsory closing of slaughter-houses should be gradual, with compensation for any loss involved. The Commission also recommend an extension of the National Mark, sales by grade and deadweight, carcass insurance, and greater publicity for the merits of home-fed meat. It concludes that the canning of low-grade beef would not be an economic proposition, even if prices of the foreign

¹ Compare the recommendations of the Committee on the Slaughtering of Live Stock, *The Agricultural Register*, 1933-4.

product were at a much higher level than now. It states that the inclusion of pork pigs in any fat stock marketing scheme is essential.

A scheme is appended to the Report for the formation of a Live Stock (England) Marketing Board.

Scotland.

The Scottish Agricultural Organization Society, Ltd., undertook to form a Committee to prepare a scheme for the reorganization of fat stock marketing in Scotland. Its members were:

- Major Mark Sprott of Riddell, J.P., D.L. (Chairman).
- Mr. W. H. Gill.
- Mr. D. W. Innes.
- Mr. W. K. Leggatt.
- Mr. J. P. Ross Taylor.

By an order under Section 19 (7) of the Agricultural Marketing Act, 1931,¹ the Committee was vested with powers and duties of an Agricultural Marketing Reorganization Commission, to

- (a) prepare, in accordance with the Agricultural Marketing Act, 1931, a scheme or schemes to be applicable to Scotland or any area thereof, for regulating the marketing of live stock.
- (b) investigate, in the course of preparation of any such scheme, the extent to which the operation of the scheme can be facilitated by co-operation between the Board administering it and other persons concerned in the marketing of fat stock, and of making such recommendations as it thinks fit for promoting such co-operation.

The Report of the Commission was published² on 16 April

¹ The Agricultural Marketing (Fat Stock Scheme) (Scotland) Order, 1932.

² *Report of the Scottish Fat Stock Marketing Reorganization Commission*, Department of Agriculture for Scotland, 1934.

1934, and it is drafted on broad regulatory lines, like that of the England and Wales Commission, proposing evolutionary rather than revolutionary changes in present methods.

The Commission's recommendations for supply regulation centre round greater control of the home supply by better and more frequent intelligence upon production and market, and the adjustment of imports, both by volume and by season, to suit the scale of home production. Like the English Commission, it considered that fat stock production did not lend itself to any rigid contract system.

The Commission considers minimum basic prices to be impracticable. Given suitable import control, home production could, in time, be safely co-ordinated to demand, and a stable price would automatically follow. Its proposals are confined, therefore, to improved methods of production and marketing.

Other proposals aim at marketing reorganization, and a tentative draft scheme for the formation of a Live Stock (Scotland) Marketing Scheme is included, embodying the principles laid down in the Report. The proposals are very similar to those of the English Commission.

The Commission considers that much of the criticism directed against the butchers has been 'of a somewhat loose and unsubstantiated nature', but it recommends the registration and licensing of butchers' shops.

'We have no recommendations to make for the immediate introduction of drastic changes in the existing methods of marketing of live stock. From our investigations and consideration of the matter, we are satisfied that such action would be ill-advised.' This really expresses the attitude both of the English and the Scottish Commissions in framing their schemes. They are essentially well-considered, long-term measures to facilitate development, but giving no answer to the farmers' demand for immediate relief from the existing 'uneconomic' level of prices.

National Farmers' Union Scheme for Live Stock

The report of the Fat Stock Reorganization Commission was unsatisfactory to the National Farmers' Union, and nothing was done to frame an alternative scheme until after the passage of the Cattle Industry (Emergency Provisions) Act. It then became apparent that, if the import control powers of the Marketing Act of 1933 were to be used when the beef subsidy came to an end, a Live Stock Marketing Scheme must be in operation. A Sub-committee of the National Farmers' Union was appointed to prepare a scheme, which is at present in draft form.

*Reorganization Commissions for Eggs and Poultry
England and Wales.*

On 9 October 1933 the Minister of Agriculture appointed an Agricultural Marketing Reorganization Commission to prepare a scheme under the Agricultural Marketing Acts for regulating the marketing of eggs and poultry in England and Wales. The members were:

Rt. Hon. Christopher Addison, M.D. (Chairman).

Mr. F. N. Blundell, D.L., J.P.

Mr. A. F. Forbes, C.A.

Mrs. Lindsay Huxley, and

Mr. Simon Marks.

Dr. Addison resigned from the Commission in October 1934, on being selected as a candidate for Parliament, and he was succeeded by Mr. Blundell.

The Report of the Commission was published on 8 February 1935.¹

It notes that the industry represents about 80 million head of poultry, with a total annual production valued at about £25,000,000, about two-thirds of which is eggs and one-third

¹ *Report of the Reorganization Commission for Eggs and Poultry for England and Wales*. Economic Series, No. 42, Ministry of Agriculture and Fisheries, 1935.

table poultry, thus ranking after live stock and dairying as the third most important branch of agriculture in the kingdom.

Eggs. The Report remarks on the large increase in home production, and the decreasing volume of imports, and suggests that import regulation, affecting a comparatively small and probably diminishing volume of supplies, could only have limited effects on the price of home-produced eggs. These prices had fallen only slightly between 1924 and 1929, in spite of the greatly increasing volume of supplies, and rapidly between 1929 and 1933, when supplies had begun slightly to decrease. The Commission felt that these price-changes were the result of fluctuations in demand, and emphasized its view that it would not be practicable, even if it were desirable, to seek to improve the position of producers by any all-the-year-round rise in the retail prices of eggs.

The Report notes the extreme variation of egg prices between spring and autumn, due to the seasonal fluctuation in the supplies of home-produced, rather than of imported, eggs, and the lag in the recovery of demand when prices begin to fall after Christmas. There are also price-differences between districts, amounting sometimes to so much as 25 to 50 per cent., which are larger than any differences in quality or in the costs of collection and handling could justify. In particular, it comments adversely on the multiplicity of systems of marketing, the bulk of producers selling direct to consumers, to retailers, by treaty or auction at markets, or to higglers, which often add to collection and handling costs by duplication of services. The demand for English eggs in the urban consuming centres was low owing to the difficulty of obtaining bulk supplies of graded eggs of uniform quality. The comparative lack of success of the National Mark Scheme, under which only about 12 per cent. of the egg output was sold, is due, the Report says, not to any weakness in the system of packing stations, but to the inherent disabilities associated with any voluntary scheme.

The Commission therefore recommends the establishment of an Egg Marketing Scheme. The country should be divided up into areas, with a radius, approximately, of ten miles round a packing station licensed or owned by the Marketing Board. About 200 such areas would be needed. The packing stations would collect all the eggs within their area, except those of exempted producers. The exemptions proposed include producers owning less than twenty-five head of poultry, if they so desire, sales direct to consumers; powers to make other exemptions are also recommended.

Areas would be grouped so as to make up twelve regions, and movement of eggs outside the producing area, but within the region, would be directed by Regional Managers. The movement of surpluses to and from regions would be subject to the approval of the Board.

The Report recommends that all eggs should be graded, and that the Board should have the power to store eggs during the glut season for use in the short season, a course which should lower costs of distribution substantially, and make for orderly marketing.

The Commission states that proposals for giving monopolies to packing stations, which would not all be under the direct control of the Board, would necessitate the control of prices, and they recommend this rather than the regulation of supplies. They reject the idea of fixing prices according to cost of production, stating that price must continue to perform its essential function of equating supply and demand, and reiterating that producers have nothing to gain from the arbitrary raising of prices by the Board. *The aim, in determining prices, must be the effective clearance of supplies.*

So the Commission recommends that the Board, after consulting Advisory Committees representing wholesale and retail traders, should fix national minimum prices which the packing stations must charge for eggs delivered to their customers, but allowing certain modifications for eggs de-

livered in large quantities. The Board should also approve the service charges made by the packing stations, and so, indirectly, it would determine producers' prices. The Commission further advised that some smoothing out of the seasonal fluctuation in prices should be attempted, by a cautious policy of storing eggs in spring for sale in the autumn. Prices should vary for weight and grade.

Poultry. The Commissioners, in their Report upon the poultry industry, remark on its slow development, both in production and distribution, compared with eggs; but as the essential needs of the two branches of the industry are similar, there should be similar organizations for marketing, with poultry service stations corresponding to the egg-packing stations. The two parts of the industry should be treated together as one 'regulated product'. As, however, the Board would have little experience to guide it in poultry marketing, development should be more gradual in this branch, and should be preceded by investigation into such matters as consumers' demands, the optimum size for service stations, and the possibilities of combining egg-packing and poultry service stations. Exemptions from the Scheme should be wider than for eggs, and should include all sales of live poultry between registered producers, all sales of poultry under two months old, sales by poultry fatteners, sales to consumers and, during the initial period, sales by large-scale producers.

The method proposed in the Report for the election of the Board introduces a new principle in the constitution of Marketing Boards in England and Wales under the Agricultural Marketing Acts, which should obviate some of the difficulties which have arisen in practice. The proposal is that producers in each area should elect Area Committees to deal with local questions, and that the Area Committees should elect the Board.

The cost of the Scheme is estimated at £150,000 a year, an amount which could be raised by a levy of 2d. per 120 eggs.

Scotland.

The Secretary of State appointed a Commission for Scotland with terms of reference the same as those for Great Britain. The members were:

Major Mark Sprot of Riddell, J.P., D.L. (Chairman).

Mr. H. H. Corner, B.Sc.

Major John Gould Kennedy, M.C.

Mr. W. K. Leggat, M.C.

Mr. James Prentice.

The Report of the Commission was published on 8 February 1935.¹ It recommends a separate Scheme for the 100,000 producers of eggs and poultry in Scotland, owing to the necessity of maintaining close local and personal touch between the Board and its producers, at least during the early years of operation of the Scheme. Such contact, the Commission considers, could not be maintained if the Board's head-quarters were to be in London. If necessary, a substitutional Scheme for Great Britain could be prepared at a later date, and in the meantime close co-operation should be maintained between the Boards of Scotland and of England and Wales, and the equivalent authority in Northern Ireland.

The Report follows, on the whole, that of the Reorganization Commission for England and Wales. The Scottish Commission also found the existing marketing system to be inadequate, and were forced to the conclusion that nothing has weighed so much against the prospects of the Scottish egg industry as the small proportion of the eggs placed on the market with a guarantee of reliability. So it bases its proposals on compulsory marketing by grade and weight, mainly through packing stations. It also advocates a national minimum price for delivered eggs, and prices to producers equal to this price less the cost of collection (unless the pro-

¹ *Report of the Agricultural Marketing Reorganization Commission for Eggs and Poultry for Scotland.* Department of Agriculture for Scotland, 1935.

ducer himself delivered to the packing station), the charges for testing, grading, and packing, the cost of delivery to the purchaser, and the contribution to the Board to meet the costs of administering the Scheme.

It differs, however, in a number of particulars from the Scheme for England and Wales, mainly owing to the different distribution of production in the two countries. The Scottish Commission does not recommend the strict delineation of areas from which each packing station should draw its supplies. So far as possible, eggs should be collected by the existing arrangements, but producers should be tied to delivering to one carrier, licensed by the Board, and delivering to a specified packing station. It also recommends that packing stations should be set up by outside enterprise, whenever this proved possible, rather than by the Board. While it considers that each packing station would, in general, first supply eggs to its own area, it did not propose any rigid control of the flow of eggs between regions.

The Commission suggests that Scotland should be divided into six regions, in each of which producers should elect, by post, a Regional Committee, with consultative functions, and a Regional Member of the Marketing Board. The Board should include, in addition, two members co-opted after consultation with the Market Supply Committee, and three National Members elected by the Regional Committees in joint session, and chosen for their wide experience of commerce and finance.

The exemptions proposed are somewhat different from those suggested in England and Wales. Producers owning less than sixteen birds over two months old would be exempt from registration. In addition, as the Scheme is intended to apply only to eggs and poultry sold for consumption, sales of eggs for hatching (provided they be so marked) and of live poultry for breeding purposes are also to be exempt. Sales of poultry under two months old, sales by producers to their staff, and

sales by institutions to their inmates or staff are to be exempt from the regulatory provisions of the Scheme. In addition, direct sales to retailers, as well as to consumers, would be permitted, though not below the minimum prices fixed by the Board.

Great Britain.

In accordance with the announcement made when the Reorganization Commissions for Eggs and Poultry for England and Wales and for Scotland respectively were set up, the Minister of Agriculture and Fisheries and the Secretary of State for Scotland, on receipt of the reports of these Commissions, appointed from among their numbers a Reorganization Commission for Great Britain. This Commission was charged with the duty of investigating and reporting on the manner in which the operation of the two Schemes, prepared by the Reorganization Commissions for England and Wales and for Scotland, could be facilitated:

- (a) By co-operation between the Boards administering them and between them and any corresponding body in Northern Ireland;
- (b) By any measures affecting imports of eggs and poultry and other poultry products.

The members are:

Mr. F. N. Blundell, D.L., J.P.

Mr. A. F. Forbes, C.A.

Mrs. Lindsey Huxley.

Mr. James Prentice.

Major Mark Sprot of Riddell, D.L., J.P.

4. Potatoes

The Potato Marketing Scheme passed through Parliament at the end of December 1933.¹ Early in February 1934, 90·4

¹ The Potato Marketing Scheme (Approval) Order, 1933, S.R. and O. 1933, No. 1186.

per cent. of those voting, representing 90.6 per cent. of the acreage, decided in favour of the scheme, which consequently came into force on 9 March 1934.

The Board, though they have the power to buy 'surplus' potatoes, act mainly as a regulatory and not as a trading body. The Scheme empowers them to estimate each year the 'quantity of potatoes required for human consumption', and to adopt methods, including the prescribing of minimum sized riddles over which potatoes sold for human consumption may be dressed, to segregate any surplus above this quantity.

The provisional Board consisted of thirty-two persons named in the Scheme, and of two persons, Mr. W. Gavin, C.B.E., and Captain J. G. Stuart, M.V.O., M.C., nominated by the Minister of Agriculture and the Secretary of State for Scotland. Early in October eighteen district members in England and Wales and six in Scotland were elected to the Board. Five special members were elected at the Annual Meeting held on 18 October. The Board subsequently co-opted the two members previously nominated by the Minister. Captain Mollett was re-elected Chairman and Mr. Batchelor Vice-Chairman. The annual remuneration was fixed at £1,500 for the Chairman, £850 for the Vice-Chairman, and £600 for members of the Executive Committee; £300 for the Chairman and £250 for members of the Merchants' Authorization Committee; £200 for the Chairman and £150 for members of the Basic Acreage Committee; and £100 for all other members of the Board.

The Scheme is financed partly by an annual levy of 5s. per acre on all potatoes grown by the 67,500 registered producers, and partly by a levy of £5 per acre on any plantings in excess of a producer's basic acreage.

Regional supervisors were appointed to keep the Board informed on market conditions in their districts, to disseminate the recommendations of the Board, and to detect evasions of the Scheme. The improvement of market news has been one of the most important of the Board's functions.

The Board has set up five committees, two of which consist solely of members of the Board. The Basic Acreage Committee fixes each member's basic acreage, defined as either:

- (a) the acreage planted with potatoes in 1933; or,
- (b) the average acreage so planted from 1931 to 1933; or,
- (c) the highest acreage so planted in 1931, 1932, or 1933; with a maximum of 7 acres.

Acreage planted for seed potatoes was excluded. The task of the Committee, once the basic acreage was established, is to consider applications from producers who, because of special circumstances, wish to be allotted basic acreages in excess of these amounts, without payment of the £5 per acre levy.

The Merchants' Authorization Committee was formed to consider applications from merchants to be permitted to deal in potatoes. Some 3,000 merchants were authorized, out of about 5,000 who applied; a further 500 may later be authorized.

The three other Committees are advisory, and two contain no members of the Board. The Advisory Committee for Scotland may offer advice to the Board on all matters particularly affecting the Scottish potato interests. The Retailers' Committee is made up of retail dealers, and can be consulted by the Board as to retailers' views on matters affecting their interests.

The fifth Committee was set up at the end of December, to prevent unfair trading and price cutting. It consists of four members of the Board, four members elected by the National Federation of Fruit and Potato Merchants, and one additional member.

Early in January, before the Scheme came fully into operation, the Board negotiated an agreement with the Northern Ireland potato interests, providing for the shipment of a maximum amount of 200,000 tons of potatoes each season from Northern Ireland to Great Britain, and for the orderly marketing of this quantity.

The Scheme did not come into full operation until almost the end of the 1933-4 season. In April, however, a census taken by the Board revealed smaller farmers' stocks than had been feared, and suggested that, if small potatoes were eliminated, prices might improve. Thus, an Order was issued prohibiting the sale for human consumption of King Edward, Red King, Golden Wonder, or Dunbar Cavalier potatoes, unless dressed over a $1\frac{5}{8}$ in. riddle, or of any other varieties unless dressed over a $1\frac{3}{4}$ in. riddle. This regulation was not to apply to early potatoes. The prohibition continued in force until the middle of July, when the bulk of the main crop has generally been sold. During the last half of July producers were allowed to sell main-crop potatoes dressed over a $1\frac{1}{2}$ in. riddle, and during August to dispose of main crops without restriction of size.

For the 1934 early potato crop, import duties were maintained at a high level and on the representation of the Board the Government negotiated an agreement with foreign countries not to ship larger quantities than in the preceding year. The Board also negotiated with Spanish and Jersey shippers for closing dates for their import seasons.¹

Price cutting in Glasgow and the Clyde valley was discussed with the potato trade, and an agreement was reached which was continued for the 1934 main-crop season.

In July, a poll of producers was taken to decide whether commission sales should be abolished, and 82.43 per cent. of those voting were in favour of abolition. The districts most opposed to the change were Kent, Essex, and parts of Bedfordshire. Sales by producers on commission were abolished from 1 September, except for:

- (a) seed potatoes;
- (b) separate lots of less than 112 lb. to separate buyers;
- (c) new potatoes up to 31 July;
- (d) sales by authorized auctioneers.

¹ See p. 59.

This prohibition of sale of potatoes except to authorized merchants came into force on 1 November. Certain classes of sales were excluded from this prohibition. They included the four types of sale which might be made on commission and, in addition, sales

- (a) to retailers,
- (b) to specified public institutions, fish fryers, caterers, &c., with certain exceptions,
- (c) to manufacturers,
- (d) in statutory or customary markets by the producer or his whole time employee,
- (e) to another producer whose main business in potatoes is producing.

From 1 November authorized merchants, as well as producers, might not sell potatoes on commission.

The 1934 potato crop was estimated to be 11 per cent. smaller than that of 1933. At the beginning of the main-crop season, in September, the Board therefore considered there was no necessity to fix a larger riddle than the minimum size of $1\frac{1}{2}$ in. However, producers were rushing their potatoes to market and realizing unduly low prices, but advice issued that marketing should be more gradual resulted in an increase in prices in October. In December the Board considered that the market needed strengthening, and on 6 December they issued an order providing new riddle regulations to apply until 12 January 1935, though subsequently it was extended until 12 February:

Not less than $1\frac{1}{8}$ in. riddle.

Varieties King Edward, Red King, and Golden Wonder; to apply to all potatoes of these varieties produced in Great Britain.

Not less than $1\frac{1}{4}$ in. riddle.

Variety Majestic; to apply to all potatoes of this variety produced in the following areas:

Cumberland, Northumberland, Durham, Westmorland, Lan-

cashire, Yorkshire, Lincolnshire, Northamptonshire (Soke of Peterborough only), Cambridgeshire (Isle of Ely only), and Scotland.

Not less than 1½ in. riddle.

Variety Majestic; to apply to all potatoes produced in any other part of Great Britain.

Not less than 1½ in. riddle.

Any variety other than those named above; to apply to all potatoes produced anywhere in Great Britain.

In Scotland, where prices remained low, the Board, early in November, offered to buy 10,000 tons at 45s. a ton for delivery in January, rising by 2s. 6d. a month to 55s. for delivery in May.¹

The Board were able to convince the Government of the desirability of limiting imports. From 1 November 1934 imports from the Irish Free State and from foreign countries are prohibited under the Agricultural Marketing Act, 1933, except by licence from the Board of Trade.

Early in January 1935 the Board began the experiment at Bishop Auckland, in Durham, of issuing for eight weeks a limited quantity of potatoes at reduced prices to persons in receipt of unemployment pay. The object of the experiment was to obtain data regarding the effect of price on consumption among this section of the community, and to obtain information as to the effect on the volume of retail sales of an auxiliary method of distribution.

5. Hops

The Hops Marketing Scheme which came into force on 7 July 1932¹ was the only one established solely under the Agricultural Marketing Act, 1931. It provided for a Hops Marketing Board, the function of which was mainly to bargain, collectively, with the brewers. The Board assumes

¹ The Hops Marketing Scheme (Approval) Order, 1932, S.R. and O.

control of the registered producers' hops, sells what it can and destroys any surplus, the sums realized from sale being returned, less expenses and reserves, to the growers in proportion to the value contributed by each. The original Scheme was amended radically during 1934.

The Board consists of fourteen elected district members, four special members elected at the annual general meeting, Lord Wolmer, Lord Lloyd, Major C. M. Higgins, and Mr. W. J. Woolrich. No changes in membership resulted from the elections held in May 1934. Salaries for the years 1933-4 and 1934-5 were fixed at the annual general meeting at £800 a year for the Chairman, Mr. W. J. Woolrich, £400 for special members, and £200 for district members. The Board have dealt with two complete crops.

1. 1933-4.

The Board marketed 194,159 cwt. of hops of the 1933 crop, and realized for them the exceptionally high average price of £15 1s. 8d. Agents' commissions amounted to 9s. 9d. per cwt., while 5s. were retained for the Board's expenses. Growers therefore received on the average £14 6s. 11d. per cwt. This level of prices led to a protest from the Brewers' Society to the Minister of Agriculture, who referred the matter to the Committee of Investigation. At the end of January 1934 the Committee reported that they saw no grounds for complaint in the prices fixed.

After its first year of operation the Board put forward amendments to the Scheme, to provide, in particular, for individual selling quotas based on each producer's average production from 1928 to 1932 inclusive, and on the ratio of the estimated market demand for English hops that season to the total of producers' output in the basic period. The details of this amendment were described in *The Agricultural Register*, 1933-4.¹ In December 1933 98·2 per cent. of

¹ Pp. 84-7.

producers, owning 97·7 per cent. of the productive capacity of hops, voted in favour of the amendment.

Consideration of these amendments by Parliament was postponed until the Committee appointed by the Minister 'to consider arrangements for securing closer collaboration between brewers and growers under the Hops Marketing Scheme Amendments' should have reported. This report was issued at the end of June, and embodied an agreement between the Hops Marketing Board and the Brewers' Society for the purchase of a fixed proportion of the total demand for hops, at an agreed price. This price was to be related to an estimated cost of production of hops, and during the next five years was to be £9 per cwt. on the average of each crop. (See p. 178.)

In July the amendment came before Parliament. Opposition centred on the monopoly granted to existing producers, and on the benefits conferred on those who had grubbed their acreage in response to pleas of excessive planting. The amendment was defended on the grounds that hops were a peculiar crop, with only one outlet; and that, if remunerative prices led to over-production, no use could be made of the surplus. The amendment passed through Parliament, and on 13 July 1934 the Minister of Agriculture and Fisheries issued an Order bringing its provisions into force.¹

2. 1934-5.

On 24 August the Permanent Joint Committee estimated the market demand for 1934-5 at 215,000 cwt. The Board subsequently announced that the total estimated market demand for the 1934 crop, including contract hops not under the Board's control, was 224,000 cwt., or 97 per cent. of the total of basic quotas issued to all producers. Consequently each individual's quota for the 1934 crop was put at 97 per

¹ The Hops Marketing Scheme (Amendment) Order, 1934, S.R. and O. 1934, No. 891.

cent. of his basic quota. The transference of annual quotas was permitted, provided that they were notified to the Board before 2 October. The transfers actually made, according to an answer made to a question in the House of Commons by the Minister of Agriculture, amounted to 485, affecting less than 5 per cent. of the crop. A hop grower, in *The Times*, estimated that an annual quota on sale in 1934 would fetch from £2 to £4 an acre.

Trading in the 1934 crop began on 17 December. A total of 239,200 cwt. of the 1934 crop was consigned to the Board for sale, compared with 194,159 cwt. of the 1933 crop.

6. Sugar

Sugar Beet.

A Scheme for the reorganization of the marketing of sugar beet was prepared by the National Farmers' Union to conform with the provisions of the Agricultural Marketing Acts, 1931 and 1933, and it was submitted in May 1934. The Scheme applies to Great Britain and proposes the formation of a Sugar Beet Marketing Board. A preliminary Board of seventeen members is nominated, and two persons co-opted on the nomination of the Minister, to remain in office until the first Board is elected by registered producers in July 1935. Thereafter the Board is to consist of sixteen elected district members, three special members elected by the registered producers, and two persons co-opted to the Board by the elected members after consultation with the Market Supply Committee. The elections in the different districts are to be held in rotation.

A poll of registered producers is to decide whether the scheme is to remain in force, those entitled to vote being producers who are registered on the qualifying date.

The Board may exempt such classes of producers, and such descriptions of sales as they may determine, from the operation of the Scheme. Any producer of not more than one-eighth

of an acre of sugar beet is also exempt from registration. A producer who is neither registered nor exempted from registration may not sell sugar beet either in Great Britain or elsewhere.

The general powers of the Board are very similar to those in previous marketing schemes. It may determine the descriptions, quantities, and prices of sugar beet which may be sold and the persons to whom, or through the agency of whom, it may be sold. The Board have also the usual powers to buy sugar beet and to manufacture beet sugar, or other commodities produced by them from sugar beet, such as mollasses, pulp, &c. It may establish factories and encourage and promote research and education.

Registered producers are to contribute not more than 6d. per ton of beet delivered to cover the costs of operation of the scheme.

The usual provisions are included for such matters as compensation, collection of information, inspection, meetings of registered producers, the election of members, voting, the amendment and revocation of the scheme and the winding up of the Board.

The Scheme was submitted on 10 May 1934, and objections were to be lodged not later than 23 June. A public inquiry was opened on 30 July. The Scheme is still *sub judice*, presumably awaiting the Report of the United Kingdom Sugar Industry Inquiry Committee.¹

Sugar.

The Agricultural Marketing Act of 1931 permitted the organization for marketing of any article of food or drink derived from any product of agriculture or horticulture. A scheme was prepared, accordingly, by refiners and manufacturers,² to regulate the marketing of sugar produced

¹ See p. 190.

² A manufacturer is a person who produces sugar from beet grown in

(refined or manufactured) in Great Britain on the grounds that sugar, beet sugar, was being grown in the country.

It was submitted to the Minister of Agriculture and the Secretary of State for Scotland on 1 February 1934, entitled the Sugar Marketing Scheme, 1934. It applies to Great Britain, and provides for the setting up of a Sugar Marketing Board. The Board as named in the Scheme consists of eleven members representative of the manufacturers and eleven members representative of the refiners, in addition to two members nominated by the Minister. After January 1935 the Board is to consist of twenty-two persons annually elected by the registered producers, and two persons annually co-opted by the elected members after consultation with the Market Supply Committee. Of the elected members, eleven must be elected by producers registered as manufacturers, and eleven by producers registered as refiners.

The Board is to be responsible for the registration of producers, either as manufacturers or refiners. Certain classes of producers, as may be determined by the Board, may be exempt from the Scheme.

A poll shall be taken on the question whether the Scheme is to remain in force, those entitled to vote being producers who are registered on a qualifying date.

The Board has to determine quotas for registered producers for the year starting on 30 September 1934, and for each subsequent year. A registered producer is entitled to a quota only if he sold sugar during the period 1 January 1930 to 31 December 1932.¹ Each registered producer's quota is to be determined by reference to his 'qualifying tonnage', that is, the amount of sugar he produced in the three years 1930-2, either on premises occupied when the Scheme came into force or on premises he had at one time

Great Britain, whether or not he also refines sugar; a refiner is a sugar producer who is not a manufacturer as aforesaid.

¹ Subject to certain other provisions.

occupied during these years but which he had ceased to use. Quotas are transferable.

A sugar producer who is neither a registered producer nor exempt from registration may not sell any sugar either in Great Britain or elsewhere. Unless allocated a quota he shall not sell any refined sugar during a quota period, nor may he sell refined sugar in excess of his quota.

Exemptions from the part of the Scheme which imposes restrictions on the sale of sugar are made for sales for export, and for such other classes or descriptions of sales as may be determined by the Board.

The Scheme was submitted to the Minister of Agriculture and the Secretary of State for Scotland on 1 February 1934, and notice was given that objections should be lodged not later than 24 March. The Public Inquiry into the objections was opened on 1 May.

Objections were raised on behalf of food manufacturers, confectioners, and canners on the grounds that the Scheme was not a bona-fide one within the meaning of the Agricultural Marketing Acts. Safeguards for the distributor and consumer were also demanded on behalf of the Federation of Growers' Associations. Representatives of the Sussex Beet Growers Ltd. and Sussex Sugar Company Ltd. also objected on the grounds that the proposed beet factory at Chichester would be unable, as a result of the Scheme, to sell refined sugar. The Scheme is at present held up in order to wait the Report of the United Kingdom Sugar Industry Inquiry Committee.¹

7. Fruit

Scottish Raspberry Marketing Scheme

In 1932 a Scheme was submitted for the marketing of raspberries, and it received parliamentary approval on 28 March 1933.²

¹ See p. 190.

² The Scottish Raspberries Marketing Scheme (Approval) Order, 1933, S.R. and O., 1933, No. 252/S. 13.

In 1931 when the Scheme was first suggested, raspberry growers were receiving about £14 per ton; in 1932 prices rose to about £30, while in 1933 they were so high as £40.¹ This may account for the emphatic rejection of the Scheme on a poll of registered producers in July 1933.

Prices for the 1934 crop were low and, at the end of the season, reached only £8-£10 per ton. A Scheme was again brought forward, almost identical with the previous one, and was submitted on 1 December 1934.

The Scheme, which applies to Scotland, establishes a provisional Board, the Scottish Raspberry Marketing Board, of fourteen members and two nominees of the Secretary of State for Scotland, who are to hold office until the first Annual General Meeting. Subsequently the Board is to consist of nine members and two persons co-opted to the Board after consultation with the Market Supply Committee. Each year one-third of the Board is to retire in rotation. The Board must appoint annually an Executive Committee of not more than seven members.

At every Annual General Meeting, registered producers shall appoint a Selection Committee of not more than twenty-five registered producers whose duty it shall be to elect a Board. The first meeting of the Selection Committee is to be held in February 1936.

The Board are to keep a register of producers who apply for registration, with information such as the acreage of raspberries *planted or under cultivation by the producer on 1 April* preceding the date of application for registration. Growers who have not more than 1 acre of raspberries are exempt from registration. Similarly, manufacturers producing raspberries for use in their own factories are exempt so long as they do not sell the fruit.

The powers of the Board include the prohibition of sales except by producers who are registered or exempt from

¹ Report of the Scottish Agricultural Organization Society, Ltd., 1933.

registration. Registered producers shall not sell raspberries otherwise than to or through the Board without its consent. On the other hand, the Board shall be bound to accept all raspberries grown by registered producers and to make payment for them. Sales in packages not exceeding 24 lb., mainly dessert fruit, to or through a merchant or commission agent for retail sale, or to domestic consumers, are exempt from these provisions, but the quantity of these sales must be notified to the Board not later than 30 September of each year.

The Board has the usual powers to determine minimum prices at which any description or quantity of raspberries may be sold, and also the person to or through whom they may be sold. The Board has powers to buy raspberries and to produce raspberry pulp and to sell both or either. It may also provide market intelligence to its producers and promote research and education.

Contributions required by the Board from registered producers shall not exceed 2s. per acre in any one year.

The money realized by the Board from the sale of raspberries of any season shall, after deduction of payments for reserves, research, &c., be distributed amongst registered producers in proportion to the quantity of raspberries supplied by them. Each producer shall receive a uniform or average price irrespective of the way in which or the price at which his individual supplies have been sold by the Board. The dates on which payments are to be made throughout the season are specified. There are certain exceptions from the flat rate of payment.

The Scheme does not include the powers for the control either of production or the quantity to be sold which were contained in the original draft of the first Scheme.

National Farmers' Union Scheme for Fruit

A Special Fruit Marketing Committee was set up in 1933 by the National Farmers' Union. A Scheme was drafted which

includes top fruits, that is to say, hard fruits, cider fruits, plums, cherries, and nuts; under fruits, rhubarb and glass-house fruits. It is to be administered by a Board of thirty-four, twenty elected district members, six members elected nationally, five members elected by glass-house producers, one elected by rhubarb growers, and two co-opted after consultation with the Market Supply Committee. Advisory Committees are to be set up for each kind of fruit, the producers of which decide, on a separate poll, to remain in the Scheme.

The powers granted to the proposed Marketing Board are largely advisory and supervisory, including the establishment of minimum grades and improved market intelligence. Power is also to be given to regulate quantity and to establish pulping and processing stations. It is also provided that the Board may fix minimum prices for soft fruit if a separate poll should result in a favourable vote.

According to the National Farmers' Union the trade are, on the whole, sympathetic to the Scheme. On the other hand, the National Federation of Fruit and Potato Trades' Associations, Ltd., have stated that 'with the exception of the proposals for securing better grading and packing of home-grown fruit, the Committee considers that the Scheme, as submitted, is impracticable and not in the best interests of the grower'. Conferences have also been held with the Jam section of the Food Manufacturers' Federation and with canners' representatives.¹

C. COMMITTEES

1. Import Duties Advisory Committee²

The Import Duties Advisory Committee was set up under the Import Duties Act, 1932, to advise the Treasury on any alteration of duties under the Act; it may also recommend

¹ The Scheme has since been abandoned.

² The applications to, and findings of this Committee are reported in the *Board of Trade Journal*.

the addition of any goods to the free list, or the increase of duties either on luxuries, 'articles of a kind which are being produced or are likely within a reasonable time to be produced in the United Kingdom in quantities which are substantial in relation to United Kingdom consumption', or articles previously dutiable, but on which the duties are about to lapse.

In addition it can recommend drawbacks of duty on commodities used for further manufacture and exported. The Committee may act under its own initiative, or may investigate requests by interested parties for changes in legislation.

The duties, additional duties, and drawbacks imposed on products important to agriculture up to the end of 1933 are detailed elsewhere.¹ In addition, molasses used solely for feeding stock, hay and straw, herring meal, and whale oil have been added to the free list.

In 1932 the Board recommended that no action should be taken to increase the duty on superphosphates and compound fertilizer, and in 1933 that no increased duty should be applied to wheat flour. In June 1933 it advised that the duty on strawberries should not be increased but that, on the other hand, strawberries should not be placed on the free list.

In 1934 the Committee investigated a wide range of commodities.² Amongst animal products it considered duties on unrefined lard, feathers, and dead turkeys. It was decided not to place unrefined lard on the free list, and to exempt feathers of birds ordinarily used for food in the United Kingdom from the *additional duty of 10 per cent. to which they were formerly liable.*

Early in October the Committee was requested to increase the duty on dead turkeys from *1d.* to *6d.* per lb.; towards the end of November it announced that it was not then prepared

¹ *The Agricultural Register 1933-4*, pp. 25-8.

² For details of successful applications and of duties actually imposed see pp. 357-9.

to recommend an increase, but would reconsider the matter early in the next year.

Amongst cereals it has also considered applications for additional duties on oats and on wheat flour and for a renewal of the drawback on exports containing linseed and linseed oil. Towards the end of December 1933 the Committee recommended that the duty on oats in grain should be raised to 3s. per cwt., and on the majority of oatmeal products to 7s. 6d. per cwt.

The Committee again rejected the application for an increased duty on wheat flour; it recommended the maintenance of drawbacks on exports containing linseed and linseed oil.

It also considered alterations of duties on a large number of fruits, vegetables, and horticultural plants. It advised drawbacks on exports of drained, glacé, or crystallized cherries, in order to stimulate the small export trade. In April and May recommendations were made for an alteration of the duties on cut flowers, and fruits preserved by chemicals (other than sugar) or artificial cold. Action on these recommendations was delayed until the commercial negotiations with the Netherlands Government were completed.

In May the Committee announced that it was prepared to consider the alteration, in the autumn, of the duties on horticultural products imposed in July 1932. In August it recommended the increase of certain duties.¹ In its report it stated that, although much still remained to be done, the industry had both expanded and improved its marketing methods, while the consumer had not suffered by the duties. It thus saw no reason to recommend any decrease in the duties, but it was not prepared to reach a final decision as to the adequacy of the existing duties, and so limited its recommendations for increased duties to the few cases in which it felt convinced that they were necessary.²

The Committee has also had requests for higher duties on

¹ See pp. 357-9.

² Cmd. 4690, 1934.

a large number of preserved fruits and fruit juices, for a reduction of the duties on edible nuts, olives, and certain forms of preserved citrus fruits, and for the addition to the free list of dextrine and farina. On some of these requests it has made recommendations, but action has been delayed during the commercial discussions with the Italian Government. The others are still under discussion.

Finally, in December, the Committee recommended a higher duty on superphosphate of lime, and had under consideration at the end of 1934 a request for an increased duty on compound fertilizers, mixed fertilizers, and compound manures.

2. Market Supply Committee

The Agricultural Marketing Act, 1933, provided for the setting up of a Market Supply Committee for the United Kingdom to be appointed by the Minister of Agriculture and the Secretaries of State concerned with agriculture in Scotland and Northern Ireland. The duties of the Committee are to review generally the circumstances affecting the supply of agricultural products in the United Kingdom and to make recommendations to Ministers as to steps which should be taken for supply regulation. In particular, the Committee are to advise and assist Ministers in the operation of any arrangements under the Act for controlling imports. They also have further duties in connexion with the Sea-Fishing Industry Act.

The Committee consists of the Marquess of Linlithgow, P.C., K.T., G.C.I.E., O.B.E. (*Chairman*), Sir David Milne-Watson, Kt., Mr. W. G. S. Adams, and Mr. Frank Hodges, J.P., with Mr. E. M. H. Lloyd as Secretary. Their duties are advisory; the Committee are expected to gather and interpret the information necessary to advise the Ministers concerned and to this end employ a small staff of investigation officers for market research.

The Committee have advised, at the special request of Ministers, on the supply situation of maincrop and early potatoes, eggs, processed milks, lard, bacon and hams, apples and pears. They have also advised on the trade in bacon and pigs between Northern Ireland and the Irish Free State, and have reviewed the question of chilled beef supplies and the trade in boneless beef. In addition, the Committee have been consulted in accordance with the terms of various Statutory Orders in the nomination of co-opted members to the Bacon Marketing Board, the English and Scottish Milk Marketing Boards, and the Potato Marketing Board.

The Committee regard it as one of their duties, in reviewing the supply situation of a particular agricultural product, to consider the views of the interests concerned with the distribution and marketing of that product and of those with special knowledge of consumers' requirements. Thus, when occasion offers, the Committee obtain the views of Marketing Boards, wholesale and retail organizations, importers and merchants, and others.

The reports of the Committee are confidential, so that it is impossible to say to what extent its recommendations have been adopted; there is no need for the Ministers concerned to accept its advice. The Committee differs fundamentally from the Import Duties Advisory Committee whose opinions and recommendations are published and which virtually determines the tariff regulations.

3. Consumers' Committees

There are three Consumers' Committees, and their duties are to report to the Ministers on the effect of marketing schemes on consumers and on complaints made by consumers.¹

(a) Great Britain.

The Committee considered in March the scope of its powers and duties under the present terms of reference; it

¹ *The Agricultural Register 1933-4*, p. 16.

emphasized the fact that it had no power to fix prices, but existed to watch the marketing schemes from the point of view of the consumer. It was an advisory, not an executive body.

It has issued no reports. In March it examined the structure of prices under the Pigs and Bacon Marketing Schemes, including the relationship between wholesale and retail bacon prices. It decided that further investigation was necessary and referred the matter to a sub-committee, which still has the matter under discussion.

(b) *England.*

During 1934¹ this Committee issued four reports, each concerned with milk; three dealt with retail prices in general, and one with the possibility of supplying milk to hotels and restaurants at less than the standard price.

In its first report, presented to the Minister of Agriculture in February, the Committee took exception to the method of determining retail milk prices by the 'prevailing price in the district'. It was not prepared to accept as axiomatic the assumption that fixing wholesale prices necessitated also fixing retail prices, and felt that, even in the absence of minimum retail prices, undercutting would be less likely under the Milk Marketing Scheme than previously.

It recommended, if minimum retail prices must be fixed, that, instead of the existing system, minimum margins should be prescribed between wholesale and retail prices, which might vary in different parts of the country and in towns of different size. The Committee stressed the fact that the system in force had led to a rise in retail prices in many districts, due, probably, in a number of places to larger retail margins rather than to higher producers' prices. This it regarded as an inevitable consequence of the method adopted for arriving at retail prices.

It recommended, therefore, that the Milk Marketing Board

should establish minimum margins for different areas, at levels low enough to give not more than reasonable returns to the distributors working, in each area, under the most economical conditions or giving the least expensive service consistent with efficiency. It stated also that it saw no justification in some areas for continuing the retail prices then current until 31 March, the end of the contract period.

In their next contract period the Milk Marketing Board gave some effect to these recommendations and fixed minimum margins between retail and wholesale milk prices, varying from 8*d.* a gallon in rural districts and towns with less than 10,000 inhabitants to 10*d.* a gallon in towns with over 50,000 inhabitants. If, however, the majority of retailers in any district, selling the bulk of the milk, passed a resolution requesting a lower retail price, then the Board might sanction it.

On 30 July the Committee presented a second report to the Minister of Agriculture, criticizing this arrangement. It considered that the clause permitting a reduction from the established minimum prices was an improvement on the previous agreement, but that otherwise the conditions suggested in its previous report were not satisfied. Having regard to the wide variations which occur in the character and cost of distributive services, the margins prescribed were too high, and sometimes out of all proportion to the services rendered.

The Committee accordingly suggested three alternatives:

- (1) *prescribing, according to different types of district, margins low enough to give not more than a reasonable return to the distributors in each district working under the most economical conditions or giving the least expensive service consistent with efficiency;*
- (2) *prescribing margins related not merely to different types of district, but to the various types of service prevailing in a district; or*

- (3) abandoning any attempt to control the price at which milk shall be sold by retail, prices being left to the free play of competition.

On 15 September the Committee again reverted to this point in a letter to the Minister saying that the terms of the contract for the next twelve months, agreed between the Milk Marketing Board and the distributors, provided for margins between retail and wholesale milk prices which were in general even higher than those prevailing during the summer of 1934.

The other question on which the Committee reported in September was a complaint made by the *Réunion de Gastronomes*. They claimed that their members, engaged in the hotel and restaurant trade, should receive the 'manufacturing rebate' for milk used for cooking purposes. The Committee considered that consumers were not injured by the existing arrangements, and its report was referred to the Committee of Investigation for England.

(c) *Scotland.*

This Committee consists of the four Scottish members of the Food Council:

Sir John Lorne Macleod, G.B.E. (Chairman).

Lord Provost Henry Alexander.

Professor Alexander Gray.

Mr. D. Cameron Thompson.

together with five other members:

Mr. Thomas Bishop.

Mrs. Buist.

Miss Sara L. Munro, J.P.

Mr. William B. Small.

The Hon. J. K. Weir.

Like the English Committee it has concerned itself entirely with milk prices.

On 2 March it reported on a complaint made by the Hotels and Restaurants Association against being placed in the same category as public institutions, such as hospitals. The Association urged that their milk was mainly used for manufacture into such articles as sauces or puddings, and that they should be classed as manufacturers. The Committee was unable to accept this view.

On 6 March the Committee issued an interim report on the effect of the Scottish Milk Marketing Scheme on consumers. It noted, compared with the previous winter, an increase in retail prices of from 4*d.* to 8*d.* a gallon in the west and south-west, a reduction of 4*d.* a gallon in Edinburgh and district, and little change in the eastern and central counties. It also referred to the increased cost to hospitals and other institutions of milk under the scheme, and recommended that, if any concessions were to be made, such institutions should be given first consideration.

On 20 April the Committee reported on a complaint made by the Scottish Co-operative Milk Trades Association on the charge made for bottled half-pints of milk. The Committee considered that such milk should be retailed at the same price per gallon as milk in pint bottles. In May the Scottish Milk Marketing Board reduced the minimum price for milk retailed in half-pint bottles from 1½*d.* to 1¼*d.*

On 20 April the Committee reported on the complaints received from the Scottish Co-operative Milk Trade Association, and from other bodies and persons, against the continuance throughout the summer of the milk prices fixed for the winter of 1933-4. It recommended that an impartial investigation should be undertaken on the costs both of producing milk in summer and winter and of distributing it. In the meantime it found, on the evidence presented, 'no reason for the radical departure from the long-established practice of differentiating between winter and summer prices without showing that the lower price, as is contended, is

insufficient to provide for a fair return to both the producer and the distributor'. In addition to deprecating the increase of consumers' prices in the summer, it considered that the fixing of a uniform price throughout the year would further increase the summer surplus and might lead to a scarcity in winter.

This report was referred to the Committee of Investigation for Scotland.

On 12 July the Committee reported on a complaint by the Glasgow Corporation about the increased prices for milk supplied to their institutions and for their child welfare and other schemes. On the representation of the Committee the Scottish Milk Marketing Board had already, on 1 June, reduced the retail price of 2s. per gallon to 1s. 10d. wherever a local authority ordered not less than 100 gallons a day. The Committee considered that 'in view of the beneficent nature of the work done by the institutions, of the fact that there is an ample supply of milk available throughout the year, and also in view of the price charged by the Board for "manufacturing" milk—4d. to 5d. per gallon—the prices fixed by the Board for institutions (both rate-supported and charitable) deserve reconsideration with a view to modification or reduction'.

The contract terms for 1934-5 provided a number of differences from the old terms, but were not wholly satisfactory to the institutions. The complaint of the Glasgow Corporation was therefore referred to the Committee of Investigation.

4. Committees of Investigation

The duties of these Committees are to report to the Minister on the reports made by the Consumers' Committees, and on complaints which do not fall within the province of the Consumers' Committees. Their reports are treated as confidential, but their recommendations are usually published. Late in 1933 one Committee was set up, to act both

as the Committee for Great Britain, and as that for England and Wales.

(a) *Great Britain.*

The Committee, in its capacity as Committee of Investigation for Great Britain, reported on the complaints made by the Parliamentary Committee of the Co-operative Congress and the Live Stock Officers' Association against the Pigs Marketing Board's provision for compulsory insurance with one company, and found that the complaints were justified. As a result, the Pigs Marketing Board gave an assurance that in the next contract period they would not withhold business from any reputable insurance company.

At the end of 1934 the Committee had under consideration two complaints—one, from the Parliamentary Committee of the Co-operative Congress against the non-inclusion in the 1935 contract under the Pigs Marketing Scheme of compulsory insurance,¹ the other, both by the above Committee and by the National Federation of Meat Traders' Association, against the clause providing for the transport of live pigs at a flat rate.²

(b) *England and Wales.*

The Committee, in its capacity as Committee of Investigation for England and Wales, has dealt with complaints about the actions of the Hops and the Milk Marketing Schemes.

In December 1933 the Brewers' Society complained against the price of £15 per cwt. charged by the Hops Marketing Board for the 1933 hop crop. The complaint was considered in January, and dismissed.

The National Association of Creamery Proprietors protested to the Committee, in April, against the refusal of the Milk Marketing Board to approve of three milk-collecting depots for the summer contract period, and their protest was

¹ See p. 124.

² See pp. 122 and 124.

upheld, on the grounds that the Board had given insufficient notice of their intentions.

A further protest against the Milk Marketing Board in September was less successful, for the Committee dismissed the protest of the Amalgamated Master Dairymen that they had been placed at a competitive disadvantage by the action of the Board in restricting the allowance of rebates for manufacturing purposes to purchasers who buy not less than 500 gallons of milk a day and manufacture not less than 300 gallons a day.

In December the Committee considered the Report of the Consumers' Committee on the complaint of the *Réunion des Gastronomes*. It found that the Milk Marketing Board had reasonable grounds for refusing to treat sales to hotels and restaurants as manufacturing sales.

Scotland.

The five members originally appointed to this Committee were:

Lieutenant-Colonel Sir H. Arthur Rose, D.S.O., LL.D.
(Chairman).

Mr. Francis Beattie.

Mr. Alexander M'Callum, O.B.E., M.A., LL.B.

Professor W. R. Scott, M.A., D.PHIL., LITT.D., F.B.A.

Sir Matthew Wallace, Bt.

Sir Arthur Rose, who had accepted office temporarily, resigned in May; he was succeeded as Chairman by Mr. A. O. M. Mackenzie, K.C.

The reports of this Committee are made to the Secretary of State for Scotland, and are confidential. Its findings, however, have either been summarized by the Secretary of State in reply to questions in the House of Commons, or have been circulated to the press. The Committee, like the Consumers' Committee for Scotland, has only had to consider matters relative to the milk industry.

The Committee of Investigation had to examine the report submitted to it by the Consumers' Committee on the complaint made by the Scottish Co-operative Milk Trade Association against a retail price of 2s. per gallon throughout the summer, which the Consumers' Committee had considered excessive; the Committee of Investigation dissented, and reported, in July, that it found the price neither unreasonable nor against the public interest. On the contrary it considered 'that in fixing that price the Board have acted in a reasonable manner in a genuine endeavour to reconcile the conflicting interests of the three parties involved—the producer, the distributor, and the consumer'.

In August the Committee reported on a complaint made by the Parliamentary Committee of the Co-operative Congress, against the refusal of the Scottish Milk Board to allow the Scottish Co-operative Wholesale Society to continue to supply liquid milk to two of its constituent societies, one in Glasgow and one in Edinburgh. It considered that it was the Board's duty, in the interests of producers and of the public, to secure the most economical distribution of milk, and that their action was reasonable in terminating the arrangement by which the Scottish Co-operative Wholesale Society supplied the societies in question, when nearer sources of supply were available, unless any transport charges for a haul of more than 25 miles should be paid by the Society rather than by the Board.

The most vexed question with which the Committee have had to deal was the claim by the East of Scotland Milk Producers' Federation for a level delivery premium, and, if necessary, regional prices and regional pools; for the alteration of haulage arrangements; and for a lowering of the Board's minimum butterfat standard. These requests, if granted in full, would necessitate amendments to the Scheme. The Committee's recommendations are summarized on p. 95, and following its report the Secretary of State announced

a number of adjustments which he proposed to make in the scheme.¹

The Committee has reported on a complaint regarding the Cheese-Milk price, but its findings have not been made public. It has also under consideration two complaints on the operation of the Scottish Milk Marketing Scheme, one by the Corporation of Glasgow of the increased price payable by its health, education, and public assistance committees, under the terms of the contract for 1934-5; and one by the Association of Certified and Grade A (T.T.) Milk Producers in Scotland about the operation of the Scottish Milk Marketing Scheme; and one complaint by distributors against the prices fixed by the Aberdeen and District Milk Marketing Board for the period beginning 1 December 1934.²

5. Food Council

The Food Council made only one report to the President of the Board of Trade during the year. It was signed on 26 May, and dealt with the development of the sale of bread of special quality at prices in excess of the Food Council's scale.

6. Agricultural Marketing Facilities Committees

These Committees examine any applications by Marketing Boards for loans from the Agricultural Marketing Funds, for purposes other than expenses incurred in connexion with the initial polls, and recommend that such loans should be made or renewed.

(a) *Great Britain.*

This Committee sanctioned three loans. A loan of £4,300 was made to the Pigs Marketing Board on 22 November 1933 to cover initial working expenses. It was free of interest until the end of November 1933; between this date and the

¹ See p. 66.

² See p. 101.

repayment of the loan by the end of 1934, interest at 3½ per cent. was charged. A loan to the Bacon Marketing Board of £1,350 was sanctioned, to cover initial working expenses; this loan, however, was not taken up, as the Board were able to obtain accommodation from their bankers. Finally, the Committee sanctioned the loan of £160,000 to the Bacon Marketing Board for the indemnification of curers against the losses sustained during the first contract period.¹ This loan was all repaid by the end of January 1935.

(b) *England and Wales.*

This Committee authorized a loan of £13,750 to the Milk Marketing Board to cover initial working expenses. It was made on 7 October and was free of interest until its repayment on 10 November 1933.

(c) *Scotland.*

This Committee sanctioned a loan of £8,500 to the Scottish Milk Marketing Board for initial working expenses, but it was not taken up.

7. The Provisional Hops Committee

On 9 April 1934, when the Hops Marketing Scheme amendment proposals, which involved the restriction of acreage, were the subject of controversy, the Minister of Agriculture, after consulting the Brewers' Society and the Hops Marketing Board, appointed a Committee to consider arrangements for securing closer collaboration between brewers and hop growers. The Committee consisted of three impartial members, nominated by the Minister,

Sir John Chancellor, G.C.M.G., G.C.V.O., D.S.O. (Chairman).
Mr. F. D'Arcy Cooper.
Captain C. Lyttleton, D.S.O., M.C.;

¹ See p. 183.

four representatives of the Brewers' Society,

Colonel George B. Winch.

Mr. S. O. Nevile.¹

Mr. F. Nicholson.

Colonel O. P. Serocold.

and four representatives of the Hops Marketing Board,

Major C. M. Higgins, O.B.E., M.C.

Mr. G. H. Edwards.

Mr. C. J. Elgar.

Mr. S. May.

The Committee was instructed to consider, in principle:

- (a) long-term planning in the production of hops;
- (b) fixing the estimated total market demand for hops each season;
- (c) the determination of prices, with reference to:
 - (i) costs of production,
 - (ii) the rate of profit to be fixed, having regard to the growers' willingness to accept a fixed rate provided the brewers agree to purchase not less than the quantity put forward as their firm requirements for the purpose of estimating the total market demand,
 - (iii) the nature of the undertaking the Brewers' Society are able to give in this respect, and
 - (iv) the marketability of the crop;
- (d) the administration of the 'Levy Fund', if such is agreed to be established; and
- (e) any other relevant question which the Brewers' Society and the Hops Marketing Board may agree to refer to the Committee;

and, having done so, to make recommendations regarding the composition, functions, and machinery of a Permanent Committee to deal with these questions.

The Committee reported unanimously on 21 June 1934.² Its Report was supplemented by an Agreement between the Brewers' Society and the Hops Marketing Board embodying

¹ Mr. E. L. D. Lake subsequently succeeded Mr. Nevile on the Committee.

² Report of the Provisional Committee appointed by the Minister of Agriculture and Fisheries. Cmd. 4628, 1934.

their recommendations. It found that planned production might still involve excessive production in spite of quotas fixed for individual growers, either because the Hops Marketing Board might over-estimate market demand in order to allow for future expansion, and to ensure against a low yield, or because individual growers might plant a number of vines which would yield an amount in excess of their quotas. The Committee considered that the risk of over-production from the latter cause, representing speculation on the part of the producer, must be accepted by him. Temporary over-production for the former reason, however, was to the interest of the brewer, and necessitated machinery to provide firm contracts for a large proportion of the market demand, and for carrying forward any unsold balance.

The Committee recommended that this machinery should consist of a Permanent Joint Committee of four representatives of the Brewers' Society, four representatives of the Hops Marketing Board, and three impartial members nominated by the Minister of Agriculture. This Committee should estimate in April of each year, assisted by information supplied by the Brewers' Society, the total market demand for all hops and for English hops picked in the next September. Brewers would be asked at that date to make firm forward contracts for at least two-thirds of the demand for English hops. The total of producers' quotas for that year would then be the estimated market demand minus any unsold balance of the previous year's market demand.

To ensure that the remaining third of the market demand should be bought the Committee recommended the establishment of a Levy Fund, financed by a charge of 10s. per cwt. on all hops sold by the Hops Marketing Board. This fund could then be used to buy, at the actual value based on the standard price, any unsold balance of the total market demand. If the accumulated fund attained a level equal to its maximum liability in any year, contributions to it should

be discontinued. If the fund were insufficient in any year to meet its liabilities, advances might be obtained on the security of any hops held in its account and of the levy on future sales.

Thus, only quota hops were guaranteed a price; for non-quota hop growers would still have to accept what they could get.

The Committee and the Brewers' Society recognized that, since the latter had no statutory powers over brewers, they could not guarantee that they would all make firm contracts in advance for two-thirds of their needs. The Committee consequently advised that the Permanent Committee should be empowered to recommend to the Minister of Agriculture the regulation of the importation of hops under the Agricultural Marketing Act, 1933, if in any season imports exceeded the amount for which provision was made in advance. It considered that, in general, the importation of hops need not exceed 15 per cent. of the total market demand for hops. If, however, as a result of a short crop, the supply of home-grown hops fell short of the estimated demand, this should be taken into account in regulating imports.

The Committee also investigated prices. It stated that the fixing of prices at cost of production plus a reasonable profit had been accepted in principle by the Brewers' Society and by the Hops Marketing Board, provided that payment should be made for the whole of the estimated market demand. In spite of the difficulties of obtaining cost figures the Committee believed 'that the use of the average cost of production as a basis for the determination of prices is not impracticable'. It recommended that costs should be averaged over a period of five years, and that, in view of the risks to which the hop growers are exposed, a profit of 20 per cent. should be added to the ascertained cost in order to arrive at prices.

Since the determination of costs must take time, the impartial Members of the Committee suggested for the next

five seasons an average price to purchasers of £9 a cwt., and this price was agreed to by brewers and growers. It was to be varied according to the varieties and grades of hops, and represented the average payment for all kinds.

As the brewers are not organized under the Acts, it is impossible to form a Development Board. It was decided therefore to appoint a Permanent Joint Committee with the following duties:

- (a) To determine in April of each year the estimated total demand for English hops of the crop which will be picked during the following September.
- (b) To administer and control the Levy Fund and the hops, if any, in its possession.
- (c) To advise as to the methods of determining the costs of production of hops.
- (d) To appoint a Committee of qualified accountants to carry out the determination of costs of production.
- (e) To nominate members for a Committee composed of representatives of the brewers and hop growers to determine the grades and prices of each season's crop.
- (f) To appoint arbitrators to settle any disputes which may arise as to the quality and marketability of hops offered for sale by the Hops Marketing Board.
- (g) To determine the date on which general trading in hops may commence.
- (h) To make recommendations to the Minister of Agriculture and Fisheries in respect of the importation of hops.
- (i) To adjust, should the occasion arise, the average agreed price.
- (j) To fix, each season, the date on which the liability, if any, of the Levy Fund shall be determined.
- (k) To advise hop growers as to the nature of the hops required by the brewing industry and as to the amounts of the demand for the several varieties.
- (l) Generally, to supervise the administration of the Agreement and as far as possible to secure the observance of the intentions expressed therein.

The representatives of the Brewers' Society signed the Report and were prepared to carry out the Agreement. They

wished it to be known, nevertheless, that they were opposed to the principles of the limitation of production by individual production quotas, which they felt would confer an unhealthy monopoly on existing growers; and that in view of the £4 per cwt. import duty they considered unnecessary the further limitation of imports of hops.

The Permanent Joint Committee was appointed in October consisting of the Provisional Committee, with Mr. C. G. Tosswill replacing Colonel Serocold, and Mr. C. J. Elgar, Mr. Gaskain. Sir John Chancellor continued as Chairman.

8. Bacon Indemnity Loan Committee

The number of pigs contracted for the first period, November 1933 to February 1934, exceeded the expectations of the Pigs and the Bacon Marketing Boards when the contract prices were arranged. The curers maintained that they would be involved in considerable losses since they would not be able to sell the greatly increased supplies of home-produced bacon at the prices on which they had reckoned. The average loss was estimated at 7s. 5d. per pig. The Government agreed to advance a loan to the Bacon Marketing Board, from which efficient curers could be indemnified against an agreed part of the losses attributable to these circumstances. A Committee was appointed to assess the losses and to make the payments, consisting of three representatives from the Pigs Marketing Board and three from the Bacon Marketing Board, together with the following three members appointed by the Minister of Agriculture and the Secretary of State for Scotland:

Lt.-Col. Sir Wyndham Portal, Bt., M.V.O., D.S.O. (Chairman).

Mr. H. G. Howitt, D.S.O., M.C., F.C.A.

Mr. N. H. Coates, LL.B., B.Sc., PH.D.

The powers under which the loan was made are contained

in the Agricultural Marketing Act, 1931, and in the Agricultural Marketing Act (No. 2), 1933, the latter measure empowering Boards to guarantee loans made to it by other Boards and to distribute them. Amendments were necessary for both the Bacon Marketing and the Pigs Marketing Schemes.¹

A loan of £160,000 was advanced, of which £144,000 came from the English Agricultural Marketing Fund and £16,000 from the Scottish Agricultural Marketing Fund. The whole loan was repaid in six monthly instalments, beginning on 31 July 1934; repayment was effected by a levy collected by the curers from producers of all pigs sold under contract until 31 December 1934. The deductions from the pig price from March to December have varied from 2*d.* to 6*d.* per score.² The loan was secured by a floating charge on all the assets of the Bacon Marketing Board, supported by a guarantee by the Pigs Marketing Board to repay the loan with interest, the primary responsibility for the full amount resting with the latter. It was paid off by the end of January 1935.

9. Technical Committee on Abattoir Design

In December 1933 the Minister of Agriculture, on representation from the Reorganization Commission for Fat Stock for England and Wales, appointed a Committee to consider and report on the technical requirements as regards output, structure, lay-out, and equipment, of factory-abattoirs in the light of modern practice at home and abroad in the processing and handling of meat, offals, and by-products.

The Committee consisted of six members:

Sir Francis T. Boys, K.B.E. (Chairman).

Sir Richard J. Allison, C.B.E., F.R.I.B.A.

¹ Bacon Marketing Scheme (Amendment) Order, 1934 (S.R. and O., 1934, No. 679); and the Agricultural Marketing (Guarantee No. 1) Order, 1934 (S.R. and O., 1934, No. 685). See pp. 116 and 127.

² See p. 122.

Mr. A. E. Eastwood.

Mr. J. Hobson.

Mr. Sidney C. Willis.

Alderman William Wright, J.P.

The report was signed on 25 June 1934,¹ and was unanimous but for a reservation by Alderman Wright, who did not wish to be committed to a policy of centralized slaughter, as implied in the principle of the factory-abattoir.

Much of the report deals with the technical requirements for abattoirs but includes some more general remarks concerning factory-abattoirs which have considerable bearing on the policy of centralized slaughtering, put forward by the Committee on the Slaughtering of Live Stock appointed by the Economic Advisory Council and which reported in 1933.²

The Committee emphasized its opinion that the factory-abattoir and its management must be entirely subject to single control. It was an essential condition that such by-products as required processing should also be subject to single control, and consequently the controlling authority should be empowered to settle, after negotiation, what by-products are to be retained at the factory for treatment and what are to be returned to the suppliers. Without single control it would be impossible to achieve the general benefits of the factory-abattoir system, specialization of labour, a continuous process, and a uniform condition and appearance of the finished product.

The problem of the minimum output for economic working of a factory-abattoir was investigated, and the Committee concluded that, 'while most of the by-products could be worked up to advantage on a throughput of about 200 cattle per week, the average minimum slaughter, in the case of the establishment working on the full factory principles which

¹ Abattoir Design, Report of Technical Committee, Ministry of Agriculture and Fisheries, Economic Series, No. 40, 1934.

² *The Agricultural Register*, 1933-4, p. 222.

we recommend, should normally be 320 beasts a week, with other classes of live stock in proportion'. According to available data, the ratios of the various classes of live stock were 66 sheep, 17 pigs, and 6 calves for every 11 beasts. By weight (dead meat) the proportion might be taken as 55 (beef), 25½ (mutton and lamb), 15½ (pork), 4 (veal). On the basis of these proportions, the average output of a standard factory should be as follows:

	Daily	Weekly (4 days)	Yearly
Cattle	80	320	16,640
Sheep	480	1,920	99,840
Pigs	120	480	24,960
Calves	40	160	8,320

The Committee assumed that the proportions between home-killed and imported meat as 50 : 50 in the large centres of population, and on that basis calculated that a standard factory would serve a district with a population of 260,000.

It considered that, in favourable circumstances, it might be worth while erecting a factory-abattoir to deal with a present average kill of 50 cattle for four days a week, with other live stock in proportion; but the full benefits of economies in the working of by-products could not be anticipated at that figure.

The factory-abattoir as designed and proposed by the Committee to meet its requirements was estimated to cost, quite roughly, £125,000, exclusive of site but inclusive of architect's and surveyor's fees.

10. Committee on Cattle Diseases

The Prime Minister appointed a committee of the Economic Advisory Council on 2 November 1932

'to consider what practical measures can be taken to secure a reduction of disease amongst milk cattle in this country, and to report upon any changes desirable in the existing administrative

practice, and, in particular, upon the value and practicability of methods for reducing the incidence of bovine tuberculosis and improving the milk supply.'

The Committee consisted of:

Sir Frederick Gowland Hopkins, Pres. R.S. (Chairman).

Sir Merrick R. Burrell, Bt., C.B.E.

Professor E. P. Cathcart, C.B.E., M.D., D.SC., F.R.S.

Dr. A. Stanley Griffith, M.D., PH.D., D.P.H.

Sir Charles Harris, G.B.E., K.C.B.

Professor J. H. Jones.

Major-General Sir John Moore, K.C.M.G., C.B., F.R.C.V.S.

The Committee reported on 16 April 1934, the report being signed by all members, with a reservation by Sir Merrick Burrell, an addendum and reservation by Sir Charles Harris, and an addendum by Major-General Sir John Moore.¹

The report was divided into four parts, the first dealing with the production and distribution of milk in relation to cattle disease and public health and the existing legislation; the second discussing possible lines of development of veterinary inspection, of disease eradication, and of compulsory pasteurization; the third part consists of the Committee's recommendations for such developments; and the fourth part contains its principal conclusions and recommendations.

It estimates that the annual loss to the nation through disease wastage in cows is about £3,000,000, and that 58 per cent. of the cows passing out of herds are disposed of on account of disease. The Committee estimated that the incidence of bovine tuberculosis among cows is probably as high in Great Britain as anywhere else and that at least 40 per cent. of cows are infected in such a degree that they will react to the tuberculin test. The administrative orders in force, such as the Tuberculosis Order of 1925, the Epizootic Abortion Order of 1922, the Milk and Dairies Acts and Orders affecting the production and sale of milk, and the Milk

¹ Report of the Committee on Cattle Diseases. Cmd. 4591, 1934.

(Special Designations) Orders, have not appreciably reduced the incidence of disease among dairy cattle. Infected cows are removed too late to prevent infection or to improve the purity of the milk supply. Less than 1 per cent. of dairy cows are in herds officially recognized as being free from tuberculosis, while the sale of designated milk is even less and shows no sign of expansion.

The three main proposals to improve the milk supply are:

- (a) an extension of routine veterinary inspection,
- (b) an active policy for the eradication of bovine tuberculosis,
- (c) the grant to large urban authorities of the right to require pasteurization of milk other than that produced from herds free from tuberculosis.

The Committee advocated a levy on the milk industry to provide a bonus for milk sold from non-tuberculous herds; the collection of the levy should be made a statutory obligation of the present Milk Marketing Boards or of any organization which may replace them.

Recommendations for veterinary inspection dealt mainly with the extension and reorganization of the present service; it was estimated that the duties envisaged would require some 300 veterinary surgeons.

The scheme for the eradication of bovine tuberculosis provides for the institution of a list of tuberculosis-free herds, periodically tested with tuberculin under official supervision; the provision of free advice and testing where *bona-fide* efforts are made to free the herds; financial help by way of loans where necessary to meet expenditure required by the veterinary inspector as necessary to eradication; a higher price for milk from disease-free herds; administrative measures to prevent the risk of cattle from accepted herds being brought in contact with other cattle when being moved about the country or exposed for sale; the adjustment of the regulations

governing the production of graded milk and the making of regulations relative to the compulsory pasteurization of milk with a view to increasing the incentive to farmers to free their herds from bovine tuberculosis. The functions of the scheme should be performed by the Ministry of Agriculture and the Department of Agriculture of Scotland.

All milk sold for liquid consumption should be sold under an official designation, clearly marked on the container in which it is sold to the public. Fixed standards of cleanliness should be laid down, approximating the present Grade A standard, at the farm. Four grades were recommended—certified, pasteurized, sterilized milks, and milk (uncertified).

No milk which has been held in a vessel containing over 100 gallons of milk, except that derived from a single herd, should be sold for liquid consumption unpasteurized. The council of any county borough, municipal borough, large burgh, or urban district in an area, the population of which exceeds 100,000, and the London County Council should have the right to prohibit the sale of milk (uncertified) after five years after the initiation of the scheme for eradication, provided it has given two years' notice of its intention to do so.

The farming community would be responsible for the costs of eradication, with the exception of the costs of tuberculin testing and general veterinary advice, most of which would be met from national or local funds. The milk industry would be responsible for finding the bonus on milk produced in accepted herds.

The State should end the compensation paid to owners of cattle slaughtered on account of tuberculosis, and instead, should grant substantial help in the eradication of the disease.

It is of interest to note that the recommendations of the Committee were preferred by many of the County authorities to the Accredited Milk Scheme prepared by the Milk Marketing Board.

II. Sugar Industry Inquiry Committee

On 7 March the Minister of Agriculture and Fisheries, moving the financial resolution for the continuation for eleven months of the Subsidy under the British Sugar (Subsidy) Act, 1925, said that this extension would enable a Committee of Inquiry to be appointed which could advise the Government upon a long-term policy. The Committee was appointed in April:

"To inquire into the condition of the sugar industry in the United Kingdom, including both home-grown beet sugar and imported sugar, and concerning production, refining, and distribution; and, having in mind the changes in the structure of the industry which would follow upon its reorganization under the Agricultural Marketing Acts, to make recommendations for its future conduct, and in particular as to the application of State aid in so far as this may be considered necessary."

The Committee consisted of

Mr. Wilfrid Greene, K.C. (Chairman).

Sir Kenneth Lee.

Mr. Cyril Edward Lloyd.

Mr. S. Caine of the Colonial Office as Secretary, with

Mr. C. Burgess of the Ministry of Agriculture as Assistant Secretary.¹

The Committee began its sittings on 9 April, and the Minister of Agriculture announced that it would report in January 1935.

D. SUBSIDIES AND LEVIES

Sugar beet, wheat, manufacturing milk, and fat cattle have been singled out for direct payments either from the Exchequer or from funds raised by special taxation, as distinct from indirect assistance designed to raise prices, such as tariffs or quantitative limitation.

The sugar beet subsidy comes from the Exchequer, and

¹ *The Times*, 4 April 1934.

was first paid in 1924. Over the ten years 1924-5-1933-4 a total subsidy of just under £30 millions has been paid, and in the current year, 1934-5, it is estimated that £4.4 millions will be required. In addition, revenue has been abated equal to rather over £9½ millions in the ten-year period, and estimated at a little over £3 millions for the current year.

Payments to British wheat growers have been made since December 1932, financed by a levy on all wheat that is milled, and on all imported flour. Payments on the 1932 crop amounted to about £4½ millions, on the 1933 crop to over £7 millions, while payments on the 1934 crop are estimated at about £6¾ millions.

Subsidies have been paid from the Exchequer to the Milk Marketing Boards since April 1934, to bring the realization value of manufacturing milk up to 5d. per gallon in summer and 6d. per gallon in winter. These payments are to continue for two years, and are estimated at £1½ to £1¾ millions annually in Great Britain, and £200,000 annually in Northern Ireland. They are to be repaid if the price of cheese attains a certain level during the two years succeeding the subsidy period. In addition, £750,000 is to be paid, spread over four years, to improve the quality of the milk supply, and £1,000,000, spread over two years, to increase the demand for milk.

Since September 1934 the Exchequer has also paid a subsidy on fat cattle. By 31 March it is estimated that rather over £2 millions will have been expended, and the subsidy is being continued.

Thus, by the early part of 1935, direct payments to agricultural producers may total about £57½ millions, £34½ millions for sugar beet, £18½ millions for wheat, £2½ millions for milk, and £2 millions for beef.

I. Milk

Under the Milk Act, 1934, which came into operation on 15 August 1934, the Exchequer are to pay certain sums to the

Milk Marketing Boards in England and Wales and in Scotland, and to the Government of Northern Ireland for transmission to the milk industry.¹ The purposes for which these sums are to be used have already been outlined.

(1) *Guaranteed minimum price for manufactured milk, and payment for farm cheese making.*

Under this part of the Act a guaranteed minimum price of 5*d.* in summer and 6*d.* in winter is to be maintained for two years until the beginning of April 1936. The Exchequer will pay to the Boards concerned the difference between this price and the actual sale price, or the cheese milk price, whichever involved the lesser rate of subsidy (Section 1). Payments will also be made to the Boards for milk manufactured in their own factories, equal to the subsidy which would have been paid if the milk had been sold for manufacture into the products made by the Board (Section 2). The difference between the *guaranteed price and the cheese milk price is also to be paid for all cheese manufactured on farms by persons owning eight or more milch cows (Section 3). Similar advances will be made to the Government of Northern Ireland in respect of milk made into cream or butter in its area (Section 6).*

The Minister estimated that the advances under this section in Great Britain would amount to from £1½ to £1¾ millions in each year. Advances to the Government of Northern Ireland are limited to £200,000 in the first year, and to a similar or lower figure in the second year.

The cheese milk price, which determined the subsidy per unit to be paid on milk made into cheese (in factories or on farms), butter, or condensed milk for export, varied during the six summer months of 1934, from 3·40*d.* to 3·86*d.* The greater part of the subsidy was made, therefore, at rates varying from a little under 1½*d.* to a little over 1½*d.* per gallon, while small payments were made at lower rates per

¹ See p. 108.

gallon. During the months October 1934 to February 1935 the cheese-milk price varied from 3·72d. to 4·25d., and the greater part of the subsidy varied from 1½d. to 2¼d. per

*Gallage of Milk upon which Subsidies have been paid,
and Amount of Subsidies, 1 April-31 December 1934**

	Under Section 1 (Milk sold for manufacture)		Under Section 3 (Milk made into cheese on farms)		Under Section 6	Total
	England and Wales	Scotland	England and Wales	Scotland	Northern Ireland	
	000 gallons	000 gallons	000 gallons	000 gallons	000 gallons	000 gallons
Apr.	10,938	679	2,059	1,184	756	15,616
May	19,943	1,029	3,051	1,982	1,405	27,410
June	18,599	1,155	2,530	1,462	2,531	26,277
July	10,850	813	1,377	1,863	2,713	17,616
Aug.	9,872	688	218	1,496	2,650	14,924
Sept.	9,107	468	†	1,145	2,089	12,809
Oct.	10,645	407	†	550	1,789	13,391
Nov.	10,022	325	†	68	†	10,415
Dec.	10,555	..	†	..	†	10,555
Apr.-Dec.	110,531	5,564‡	9,235§	9,750	13,933||	149,013¶
Amount of advances	£	£	£	£	£	£
Apr.-Dec.	677,208	33,014‡	58,151§	58,484	123,659||	950,516¶

* From the Ministry of Agriculture and the Department of Agriculture for Scotland. † Not available. ‡ April-November.

§ April-August.

|| April-October.

¶ Incomplete.

gallon. The gallage of milk, monthly, upon which payments were made is given in the accompanying table. Both the quantity and the payments were at their maximum in May and June and have since declined. During the nine months payments had been made on 149,013,000 gallons of milk, of which 74 per cent. was sold for manufacture in England and Wales, and 4 per cent. in Scotland; 6 per cent.

was made into cheese on farms in England and Wales, and 7 per cent. in Scotland; and 9 per cent. was made into cream and butter in Northern Ireland.

These figures exclude payments under Section 2 of the Act, for milk manufactured by Marketing Boards themselves. No applications have yet been received under this Section, partly owing to the difficulties of certifying the appropriate manufacturing prices. Payments to the English Board under this Section would be unimportant, but the Scottish Board are preparing claims for the period 1 April-30 November 1934, which are estimated to amount to £44,000.

If this amount be included, payments to provide a minimum price for manufacturing milk amounted to about £995,000 in the nine months April-December 1934, of which 68 per cent. was for milk sold for manufacture in England and Wales, and 3 per cent. in Scotland; 4 per cent. for milk manufactured by the Scottish Milk Marketing Board; 6 per cent. for milk made into cheese on farms in England and Wales, and 6 per cent. in Scotland; while 13 per cent. was paid to Northern Ireland. Thus, 74 per cent. of payments in this period went to England and Wales, 13 per cent. to Scotland, and 13 per cent. to Northern Ireland.

Small payments are due, also, in respect of milk manufactured in the areas of the Aberdeen and District and North of Scotland Milk Marketing Schemes, which will probably not exceed £500, in either area, during the financial year ending 31 March 1935.

(2) *Provisions for improving the quality of the milk supply.*

Under Section 9 of the Act, owing to delays in starting the Schemes for Accredited Producers, no subsidies have yet been paid. The amount payable is limited to £750,000, spread over four years. A scheme of Attested herds has been prepared,¹ under which producers of milk coming up to pre-

¹ See p. 81.

scribed standards, including freedom of reaction to tests for tuberculosis, shall be paid by the respective Milk Marketing Boards a bonus of 1d. per gallon. The Exchequer is to provide the money for this bonus, and for the expenses of the testing. The bonus will not be paid on milk which obtains special prices as graded milk.

(3) *Provisions for increasing the demand for milk.*

Under Section 11 of the Act, the Minister of Agriculture may contribute, pound for pound with the Milk Boards, a sum limited to £1,000,000, spread over two years, to increase the demand for milk. Of this amount £140,000 has been provisionally allocated to Scotland, on the basis of the cow population. No payments have as yet been made, but the Minister of Agriculture has approved schemes for supplying milk at reduced rates to school children attending full-time courses recognized for grant by the Board of Education or the Scottish Education Department, in the areas of the Milk Marketing Scheme, the Scottish Milk Marketing Scheme, and the North of Scotland Milk Marketing Scheme. The milk is in all cases to be sold to the children at $\frac{1}{2}$ d. for one-third of a pint, and is to be delivered in bottles, whenever possible. This is about half the ordinary retail price.

The English scheme came into force on 1 October 1934. Its details were worked out by the Board and by a Publicity Advisory Committee, appointed by the Board, under the Chairmanship of Lord Astor. It only applies to milk sold through the Board. Therefore, if producers of Certified or Grade A milk wish to participate they must, for these sales, register with the Board. The children pay the distributors 1s. per gallon for the milk. The distributors have agreed to accept 6d. per gallon for their services. Thus, they transmit, in effect, the remaining 6d. to the Board. The loss represented by the difference between the regional liquid price and 6d. per gallon is then to be shared equally between the Milk

Marketing Board and the Exchequer on the first 18 million gallons sold, while on any sales in excess of this amount the Exchequer will bear a quarter of the loss and the Board three-quarters. It is expected that the whole £860,000 allocated to England and Wales will be spent during the two years of the subsidy.

The Board estimate that, in November, about 2,400,000 children were obtaining milk under this scheme, and that during the first three months of the scheme milk sales averaged about 2 million gallons monthly.

Both the Scottish schemes are to include authorized courses for unemployed boys and girls established under the Unemployment Act, 1934, as well as schools. In both, also, it is stipulated that the milk supplied shall be, so far as possible, Grade A (T.T.) milk.

In the area of the Scottish Milk Marketing Board the milk-in-schools scheme came into force on 5 November, but it is not yet fully developed in all regions. In January about 163,000 children were participating, and it was expected that the number would shortly be raised to 400,000 or 500,000, of which about half would receive Grade A (T.T.) milk.

No limit has been fixed, at present, to the gallonage on which the Exchequer will pay half the loss. The basis of payment is somewhat different from that in England. Grade A (T.T.) milk is ordinarily sold at 3*d.* over the standard price, viz. 1*s.* 6*d.* in three winter months, 1*s.* 4*d.* in three summer months, and 1*s.* 5*d.* in the remaining six months. School children pay 1*s.* per gallon, of which the distributors take 6*d.* There is, therefore, a difference of from 10*d.* to 1*s.* per gallon. Of this difference the Exchequer pays 5*d.* and the Board the remainder. On sales of ordinary milk the loss is assumed to be 6½*d.* per gallon, of which the Exchequer pays 3½*d.*¹

In the North of Scotland area the scheme began on

¹ *The Official Journal of the Scottish Milk Marketing Board*, vol. 2, No. 1, 21 January 1935.

10 December 1934. In the Aberdeen area the Board is still considering the adoption of a scheme.

At least six-sevenths of the funds available for increasing the demand for milk are to be spent on these schemes.

2. Fat Cattle

To give some immediate assistance to the beef industry in the period before any permanent arrangement with exporting countries for a scheme of levy *cum* subsidy, on the lines of the Wheat Act, the Cattle Industry (Emergency Provisions) Act, 1934, was passed through Parliament at the end of July.¹ This Act empowered the Treasury to form a Cattle Fund out of which to pay a subsidy to producers of fat cattle which conform to a standard to be prescribed by regulations, and which were sold during the period 1 September 1934 to 31 March 1935. Payments must not exceed 5s. per cwt. for live animals, or 9s. 4d. per cwt. for carcasses, and may be made only on animals which have been in the United Kingdom for a continuous period of at least three months. The Fund is administered by the Minister of Agriculture and Fisheries, and the Secretaries of State in Scotland and in Northern Ireland. These Ministers are advised generally in the discharge of their functions under the Act by a Cattle Committee, which is responsible for the whole of the executive as well as the advisory duties in connexion with the scheme, and the payments are actually made by it.

The Committee was set up on 31 July, and consists of the following:

Lt.-Col. Sir John R. Chancellor, G.C.M.G., G.C.V.O., D.S.O.
(Chairman).

Sir Francis T. Boys, K.B.E. (Vice-Chairman).

Mr. George Dallas, J.P.

Mr. W. J. Harvey.

¹ 24 & 25 Geo. V, c. 54. See p. 15.

Mr. H. G. Howitt, D.S.O., M.C., F.C.A.

Mr. J. B. Orr, D.S.O., M.C., M.A., M.D., D.SC., F.R.S.¹

The Hon. Jasper N. Ridley, J.P., B.A.

Every animal on which payment is claimed has to be presented at a Certification Centre approved by the Cattle Committee.² At these, Certifying Authorities of three persons have been appointed, to determine if the animal is eligible for the subsidy, to supervise its weighing and its marking by means of a hole punched in the ear, and to ensure that it cannot be presented for subsidy more than once. One member of the Certifying Authority acts as Certifying Officer, to issue the certificate and to keep the necessary records for the Centre. In some of the more remote districts of Scotland, where there are no live-stock markets and the number of fat cattle is very small, special arrangements have been made. In Northern Ireland, officers of the Ministry of Agriculture for Northern Ireland have been appointed to carry out all the duties of both Certifying Authorities and Certifying Officers. When payment is claimed for a carcass, the animal must be presented at an approved dead-weight certification centre; at these centres, which have been provided only in Great Britain and not in Northern Ireland, a Certifying Officer is charged both with the duties of determining the eligibility of the animal, of weighing the carcass, and of issuing the necessary certificates.

During August, the appropriate Ministers issued Orders providing that the standard to which five animals should conform was to be a killing-out percentage of not less than 52 per cent.,³ and that the maximum rates of subsidy under the Act, that is to say, 5s. per cwt. on live cattle, and 9s. 4d. per cwt. on carcasses, should be paid.⁴

¹ Now Sir John Orr.

² *Particulars of Arrangements for Purposes of Section 2 of the Cattle Industry (Emergency Provisions) Act, 1934.* Cmd. 4678.

³ S.R. and O. 1934, No. 928.

⁴ S.R. and O. 1934, No. 929.

By 1 September, the date on which the scheme came into force, over 600 live-weight and 25 dead-weight Certification Centres had been approved. By the end of the year, the approved live-weight Centres had been increased to 822, including 72 in Northern Ireland, and the dead-weight Centres to 32.

The average rate of payment per animal was £2 8s. 3d. in the first fortnight of September. It fell to £2 7s. about the middle of October, and then rose again to £2 9s. 6d. in the middle of December.

At the end of December it was announced that from 1 January 1935, the minimum killing-out percentage would be raised from 52 per cent. to 54 per cent. But the main reason for the change was that in the winter months, when they are fed in stalls or yards, cattle have a higher killing-out percentage than when they are fed on grass owing to the drier nature of their food, and a 54 per cent. beast in winter approximates to a 52 per cent. beast in summer.

Up to the end of the year a total sum of £1,063,694 had been paid in subsidy on 446,049 animals, an average of £2 7s. 8d. per animal. This amount and the number of qualifying cattle was divided as follows:

	Live-weight centres			Dead-weight centres		
	Pay-ments	Number	Pay-ment per head	Pay-ments	Number	Pay-ments per head
England and Wales	£ 767,536	321,834	£ 2 7 8	£ 19,409	7,906	£ 2 9 1
Scotland	220,242	90,416	2 8 9	4,978	1,945	2 11 2
Northern Ireland	51,529	23,948	2 3 0	..	..	..
Total	1,039,307	436,198	2 7 8	24,387	9,851	2 9 6

At the present rate of marketing the whole of the sum of £3,000,000 provided by the Act will not be required by 31 March, the last date on which the Act is operative. The amount paid out by that date will be, probably, about £2,000,000.

3. Wheat

Under the Wheat Act, 1932, a deficiency payment is made to farmers on sales of millable wheat, the payment being the difference between the ascertained average price of home-grown millable wheat and 10s. per cwt. The amount of wheat on which the full payment is made is limited to 27,000,000 cwt., any excess causing a proportionate reduction in the deficiency payment. The fund from which these payments are made is obtained from a levy on flour, imported and home-produced, collected by the millers and paid to the Wheat Commission.¹

The accounts for the first period, 19 June 1932 to 31 July 1933, were published in 1934.² Quota payments by millers and importers of flour, less certain repayments, totalled £4,774,207 13s. 1d., while deficiency payments to registered growers amounted to £4,510,946 os. 8d. Including various other items of expenditure and income, a balance of £221,038 2s. 5d. was carried forward as at 31 July 1933.

During the second quota period, 1 August 1933-31 July 1934, sales of millable wheat amounted, approximately, to 29,570,000 cwt. Thus, in one year, the amount on which the full deficiency payment could be paid was exceeded by 2,570,000 cwt. The ascertained average price for the year was 4s. 7-63d., about 1s. 1d. less than was anticipated at the beginning of the season. The deficiency payment amounted to 4s. 10-30d., so that the average return for home-grown millable wheat was 9s. 5-93d., and the total deficiency payments returned to British growers was £7,178,500, compared with £4,511,000 in 1932-3.

The final payment for the 1933-4 year was made in November 1934, advance payments having been made in February, April, July, and September. According to a report

¹ *The Agricultural Register, 1933-4*, pp. 37 and 155.

² *Wheat Fund, Accounts 1932-3*, His Majesty's Stationery Office, 1934.

in the *Farmer and Stockbreeder*, there were about 86,600 growers who received deficiency payments averaging about £83 per grower.

According to present estimates,¹ the payments to growers

*Estimated and Actual Supplies and Deficiency Payments
under the Wheat Act, for the different Quota Periods*

	1932-3	1933-4	1934-5
Anticipated supply of wheat . . .	19,800,000 cwt.	29,000,000 cwt.	32,000,000 cwt.
Anticipated flour supply . . .	90,000,000 cwt.	83,600,000 cwt.	84,375,000 cwt.
Estimated average wheat price / . . .	5s. 9d.	5s. 8d.	5s. 0d.
Actual sales of wheat	20,400,000 cwt.	29,570,000 cwt.	..
Ascertained average price . . .	5s. 4.46d.	4s. 7.63d.	..
Deficiency payment . . .	4s. 5.25d.	4s. 10.30d.	4s. 2½d.†
Average return per cwt. . . .	9s. 9.71d.	9s. 5.93d.	9s. 2½d.†
Payments to growers	£4,511,000	£7,178,500*	£6,750,000†

* Provisional.

† Estimated.

for 1934-5 will amount to about £6,750,000; the average wheat price is unlikely to be as low as in 1933-4, and the total deficiency payments will be correspondingly less. Sales of millable wheat will be considerably over the estimate of 29,000,000 cwt.; if they amounted to 32,000,000 cwt., the deficiency payment would be proportionately reduced to about 4s. 2½d., and the grower's return per cwt. would average about 9s. 2½d.

Wheat certificates lodged with the Wheat Commission from 1 August to 5 October 1934 covered 5,387,213 cwt. compared with 5,020,982 cwt. in the corresponding period of 1933, an increase of 7 per cent.

Under the Wheat Act there are provisions for setting up

¹ See pp. 360-1.

a Flour Millers' Corporation, the main purpose of which is to buy, from registered wheat growers, such stocks as are on hand at the close of the cereal year, if the Wheat Commission makes such representations to the Minister in June of that year.¹ The Corporation need not buy more than $12\frac{1}{2}$ per cent. of the anticipated supply for that year. The Corporation would consist of a chairman and four other persons appointed by the Minister after consultation with such bodies as are representative of millers' interests. It has to make arrangements for the registration of all millers who apply for registration.

The following members have been appointed:

Mr. Lewes Hector Read (Chairman).

Mr. Sidney Bruce Askew.

Mr. James McFadyean.

Mr. Alexander Hutchison.

Mr. Charles James Papworth.

They are to hold office until succeeded by a corporation elected by flour millers registered under a scheme which the Corporation is to prepare and submit to the Ministers concerned.

4. Sugar Beet

The subsidy under the British Sugar (Subsidy) Acts of 1925 and 1934 is paid direct to the sugar beet companies on the sugar and molasses which they manufacture from sugar beet grown in Great Britain. Claims for the subsidy are made weekly, on prescribed forms, to the Ministry of Agriculture or Department of Agriculture for Scotland. There is no legislative provision for the division of the subsidy between factories and farmers although during the first four years of the subsidy, 1924-5 to 1927-8, the factories were required to pay a minimum price for beet.² The grower, in fact, obtains

¹ Wheat Act (22 & 23 Geo. V, c. 24), Section 1 (3)-(8), and the Second Schedule.

² Bridges, A., and Dixey, R. N. *British Sugar Beet: Ten Years' Pro-*

his share of the subsidy in the price paid by the manufacturers for beet, and this has been negotiated, in general, by collective bargaining between the factory companies and the National Farmers' Union.

During the first ten years of the subsidy, the amount paid

Subsidy and Revenue Abatement on Home-grown Sugar

<i>Year</i>	<i>Subsidy</i>	<i>Revenue Abatement</i>
	£	£
1924-5	492,040	46,000
1925-6	1,121,581	222,000
1926-7	3,325,393	656,000
1927-8	4,214,060	813,000
1928-9	2,823,598	613,000
1929-30	4,233,776	1,022,000
1930-1	6,141,875	1,485,000
1931-2	1,790,733	880,000
1932-3	2,376,932	1,678,000
1933-4	3,388,000	2,164,000
Total 10 years	29,907,988	9,649,000
1934-5*	4,400,000	3,100,000

* Provisional.

has totalled almost £30,000,000 and the value of the preference on the excise duties on home-produced sugar as compared with the full customs duty on imported sugar has amounted to about £9,649,000. Estimates for the 1934-5 season, based on the production of sugar beet, indicate that the subsidy to be paid will amount to about £4,400,000 and the excise duty preference to £3,100,000.

The Minister of Agriculture announced in the House of Commons on 6 February 1935 that the Report of the Committee of Inquiry into the United Kingdom Sugar Industry

gress under the Subsidy, issued by the Agricultural Economics Research Institute, Oxford, 1934.

would not be ready till the end of February, which would be too late for the 1935-6 beet-growing season. The Government intended, therefore, to provide further interim assistance to cover the next crop, limited to the produce of 375,000 acres and based on the assumption that the growers will provide approximately this acreage at a price of 1s. per ton below that offered in the 1934 contracts.

Assistance will be 5s. per cwt. of white sugar, related to a raw sugar price of 4s. 6d. per cwt. with appropriate adjustments either upwards or downwards if the average price of raw sugar should vary from that figure. Such assistance may be conditional upon the acceptance by the industry of any measures of reform which may be proposed by the Government after consideration of the Committee's Report.

V. SUPPLIES AND PRICES

A. GENERAL

1. Demand

THE most important single factor affecting prices in 1934 was the higher level of demand. Aggregate money incomes had expanded, in the main, because of the fall in the long-term rate of interest and the consequent recovery of investment in capital goods, particularly in houses. The Bank rate remained throughout the year at 2 per cent., to which level it had been reduced in July 1932, while short-term money rates averaged less than 1 per cent. These factors continued to exert an influence on long-term interest rates. The yield on the $3\frac{1}{2}$ per cent. British Government Conversion Loan, which had averaged about $4\frac{1}{2}$ per cent. in 1931, fell to less than $3\frac{1}{4}$ per cent. by the end of 1934, while the yield on the 5 per cent. Conversion Loan, which had averaged rather under $4\frac{3}{4}$ per cent. in 1931, had fallen to nearly $2\frac{3}{4}$ per cent. by the end of 1934.

Industrial activity as a whole, as measured by the *Economist* index, which had fallen between 1927-9 and 1932, rose between 1932 and 1933. The expansion was most marked at the end of 1933 and in January 1934; in spite of a reduction in the rate of increase of the index in the remaining months of 1934, the average for 1934 was 10 per cent. above that for 1933.

Similar changes occurred in employment. The *Economist* index of employment fell rather less than that of industrial activity between 1927-9 and 1932, rose to about the same extent in 1933, but more slowly between 1933 and 1934. It showed a slight lag behind the index of activity, so that the upward trend continued into the early months of 1934. Unemployment, though still higher than in any of the years

from 1927 to 1930, averaged 14 per cent. less in 1934 than in 1933. Average wages, which had fallen slowly between 1927-9 and 1932, and remained stable in 1933, continued at

Index Numbers and Measures of Industrial Activity

	'Economist' Index of industrial activity 1924 = 100	'Economist' Index of employ- ment 1924 = 100	Numbers of unem- ployed 000	Index of money wages December 1924 = 100	Index of consumers' spending power 1924 = 100	Percentage change in retail sales compared with the previous year
1927-9	107.9	106½	1,217	99.9	109	..
1930	105.9	102½	2,014	98.3	104	..
1931	96.3	99	2,719	97.0	99	..
1932	95.8	98	2,813	95.3	96	-4.0
1933	99.7	102	2,588	94.0	98	-0.3
1934	109.2	106½	2,221	94.1	102	+3.2
1st qr.	108.1	104½	2,368	94.0	101	+4.2
2nd qr.	108.2	106½	2,169	94.0	103	+3.4
3rd qr.	108.4	107	2,175	94.0	103	+3.3
4th qr.	111.1	107	2,173	94.25	103	+3.0

the same level in 1934 until October, when a slight rise occurred.

An index of consumers' spending power, combining both wages and employment, showed an increase of 4 per cent. between 1933 and 1934.

Changes occurred also in the value of retail sales, as published by the Bank of England. These declined continuously, compared with the corresponding months of the preceding years, until the middle of 1933. Thereafter an increase started, and the value of retail sales from February to December 1934 exceeded those in the corresponding period of 1933 by 3.2 per cent.

In general the increase in demand, which had begun to show itself in 1933, continued in 1934. There was a slackening of the expansion towards the end of the year, but the general levy was very considerably higher than in 1933. This

change was one of the most potent factors affecting prices in 1934.

2. Supplies

Statistical evidence shows that world industrial activity, which had declined between 1929 and 1932, started to increase again in 1933, and continued to do so in 1934. The increase in production was practically confined, however, to non-agricultural materials. Agricultural production was lower in 1933 than in 1932, and it is probable that there was a further decrease in 1934. Stocks of agricultural commodities were also reduced, in general, during the year.

a. Home-production

i. Crops.

With the exception of wheat, potatoes, and sugar beet, the production of crops in Great Britain in 1933 and 1934 was considerably below the average of the preceding ten years.

Estimated Crop Production in Great Britain, 1923-32, 1933, and 1934*

		1923-32	1933	1934†	Percentage increase (+) or decrease (-) over 10-year average	
					1933	1934
Wheat	ooo tons	1,322	1,666	1,859	+26.0	+40.6
Barley	"	1,011	688	817	-31.9	-19.2
Oats	"	2,079	1,920	1,761	-7.6	-15.3
Turnips and swedes	"	15,520	10,957	9,213	-29.4	-40.4
Mangolds	"	6,044	4,168	4,769	-31.0	-21.1
Potatoes	"	3,934	4,555	4,464	+15.8	+13.5
Hay	"	7,995	6,582	6,653	-17.7	-16.8
Sugar beet	"	1,973‡	3,298	4,050	+67.2	+105.3
Hops	ooo cwt.	283	216	259	-23.7	-8.5

* Preliminary Agricultural Returns for 1934; and *Agricultural Statistics*, vol. lxviii, part 1, 1933.

† Provisional.

‡ 1927-32.

The decline was almost entirely due to the decreased acreage under arable crops, since yields were good both in 1933 and 1934. In 1933 all the crop yields, excepting root crops and hay, were above the ten years' average, and in 1934 only the hay yield was below normal. These high yields, however, did not compensate for declining acreages.

The three crops which showed increased production in 1933 and 1934 compared with the previous ten years had all increased their acreage. The expansion in potato acreage, however, was slight, and the higher production was predominantly due to good yields.

The two other crops which were larger in 1933 and 1934 than in the preceding decade were wheat and sugar beet, both heavily subsidized.

ii. *Live stock.*

Estimates of the output of live-stock products in Great Britain are based on the yields per animal in the Census year 1930-1, and take no account of yield variations which may have occurred since that date.

The production of *meat* showed practically no change in 1933-4 by contrast with the previous year.

The output of *milk* in Great Britain in 1933-4, exclusive of that fed to calves, has been estimated at 1,548 million

*Estimated Production of Meat in Great Britain, 1924-5, 1930-1, 1932-3, and 1933-4**

<i>Year ending 31 May</i>	<i>1924-5</i>	<i>1930-1</i>	<i>1932-3</i>	<i>1933-4</i>
	000 cwt.	000 cwt.	000 cwt.	000 cwt.
Beef and veal . . .	10,741	11,036	11,410	11,344
Mutton and lamb . . .	3,813	4,163	5,060	5,633
Pig meat	7,193	5,247	6,862	6,711
Total	21,747	20,446	24,232	23,688

* Data supplied by the Ministry of Agriculture and the Department of Agriculture for Scotland.

gallons, being $8\frac{1}{2}$ per cent. more than in 1930-1, and 20 per cent. more than in 1924-5.

All estimates of the output of eggs and poultry in Great Britain are subject to a considerable degree of error. The

*Estimated Production of Eggs and Poultry on Holdings over one acre in size in Great Britain, 1924-5, 1930-1, and 1933-4**

Year ending 31 May	1924-5	1930-1	1933-4
Eggs:	millions	millions	millions
Hen	1,617	2,826	3,481
Duck	77	71	74
Total	1,694	2,897	3,555
Poultry:	thousands	thousands	thousands
Fowls	17,000	24,000	32,000
Ducks, geese, and turkeys	3,330	3,460	4,170

* Supplied by the Ministry of Agriculture.

production of *eggs* on agricultural holdings in Great Britain increased 71 per cent. between 1924-5 and 1930-1, and a further 23 per cent. between 1930-1 and 1933-4. The indications are that this large rate of increase has been checked. The output of *fowls* rose by 41 per cent. between 1924-5 and 1930-1, and by a further 33 per cent. between 1930-1 and 1933-4. The output of *ducks, geese, and turkeys* increased less rapidly, being only 4 per cent. greater in 1930-1 than in 1924-5, and 21 per cent. greater in 1933-4 than in 1930-1.

The output of *wool (greasy)* in the United Kingdom in 1934 was 114 million lb., of which Northern Ireland produced about 2.5 million lb. This was a reduction of about 6 million lb. from 1933, and compares with an average of 112 million lb. in 1930-1 and 100 million lb. in 1924-5.¹

¹ *Wool Intelligence Notes* vol. i. no. 5, August 1933, and vol. ii, no. 5, August 1934.

*b. Imports**. Human food-stuffs.*

Since 1931 there has been a very considerable reduction of food imports, due, in addition to the effect of low prices, to tariffs, embargoes, voluntary quantitative regulation, and, finally, to compulsory restriction. Between 1931 and 1933 meat imports declined by 14 per cent., wheat and wheat flour by 6 per cent., eggs 27 per cent., vegetables 44 per cent., and

*Index Numbers of Food Imports into the United Kingdom,
1931-4**

(1927-9 = 100)

	<i>Meat</i>	<i>Dairy products</i>	<i>Wheat and flour</i>	<i>Eggs</i>	<i>Vegetables</i>	<i>Fruit</i>	<i>Total</i>
<i>From foreign countries:</i>							
1931 . . .	117	112	114	104	172	115	116
1932 . . .	114	109	56	80	154	99	99
1933 . . .	95	110	63	68	75	49	86
1934 . . .	81	114	76	77	70	43	84
<i>From Empire countries:</i>							
1931 . . .	117	135	106	106	102	133	117
1932 . . .	109	147	142	104	106	164	123
1933 . . .	114	157	150	104	134	244	141
1934 . . .	123	171	116	100	122	196	137
<i>From all countries:</i>							
1931 . . .	117	123	110	104	156	120	117
1932 . . .	112	127	96	84	142	118	111
1933 . . .	101	133	103	76	87	107	107
1934 . . .	94	142	95	81	81	88	104

* Weighted by the value of imports in 1927-9.

units 11 per cent.; only dairy products showed any increase, due to a 17 per cent. increase in Empire butter supplies. Making the twenty-eight products which compete most directly with British farm produce, the total volume from

foreign countries declined by 26 per cent., while Empire shipments rose by 21 per cent. The net result, however, was a decline of over 9 per cent. between 1931 and 1933.¹

There were further changes during 1934, but they were not so marked as in 1932 and 1933. Of the same twenty-eight commodities, imports of ten increased and eighteen declined. Larger supplies were received of chilled beef, frozen beef and veal, frozen and chilled pork, live sheep, butter, eggs in shell, eggs not in shell, onions, apricots, and cherries; there were smaller imports of wheat, flour, frozen mutton and lamb, bacon and hams, live cattle, live pigs, dead poultry, cheese, condensed whole milk, condensed separated milk, potatoes, tomatoes, apples, pears, plums, currants, gooseberries, and strawberries.

Meat imports, as a group, declined by 7 per cent., wheat and wheat flour by 8 per cent., vegetables by 7 per cent., and fruits by 18 per cent. Dairy products increased by 7 per cent. and eggs by 7 per cent. The result of these changes was a decline of 3 per cent. in the total volume of food imports between 1933 and 1934. Since 1931, imports have dropped by about 11 per cent. and the proportion coming from the Empire has increased from 38 per cent. to 50 per cent.

ii. *Feeding-stuffs, fertilizers, wool, and hops.*

There was a considerable increase in the volume of imported animal feeding-stuffs during 1934. In 1933 the value was £26,400,000; in 1934 it amounted to £31,000,000, but part of this increase was due to a rise in prices.

If the 1933 imports are calculated at 1934 values, in order to make allowances for price changes, the increase in the volume of feeding-stuff imports between 1933 and 1934 was 14 per cent. Barley, oat, and maize imports increased about 9 per cent., while by-products, cakes, and meals increased by 25 per cent.

¹ Murray, K. A. H., and Cohen, Ruth L., *The Planning of Britain's Food Imports: A Quantitative Study of the Effects of Recent Legislation*, issued by the Agricultural Economics Research Institute, Oxford, 1934.

Fertilizer imports increased by about one-third between 1933 and 1934. The volume of wool imports declined by 17 per cent., while that of hops was unchanged.

Gross Values of Imports of Various Commodities

	1933	1933 imports at 1934 values	1934	Percentage change
	£ million	£ million	£ million	
Barley, oats, and maize	15.2	16.5	18.0	+ 9.1
Rice, peas, beans, oat and maize products, and other farinaceous substances . . .	5.2	4.8	5.6	+ 16.7
Feeding stuffs for ani- mals	6.0	5.9	7.4	+ 25.4
Total mainly feeding stuffs	26.4	27.2	31.0	+ 14.0
Fertilizers	1.6	1.5	2.0	+ 33.3
Wool	35.6	44.8	37.2	- 17.0
Hops	0.5	0.4	0.4	..

c. Estimated total supplies

i. Live-stock products.

The total supplies in Great Britain of various live-stock products are estimated in the accompanying table. The gross output of farms in Great Britain, less exports, has been taken to represent home supplies; gross imports into the United Kingdom *minus* imports into Northern Ireland and re-exports from the United Kingdom, *plus* imports from Northern Ireland, are taken to represent Great Britain's supplies of imported products. The resulting figures must be considered as giving only an approximation of the proportion of each product which are home-produced and imported.

About 45 per cent. of the beef and veal supply was home-produced, 44 per cent. of the mutton and lamb, and 38 per

cent. of the pigmeat. The milk-product estimates are less satisfactory, but perhaps 36 per cent. of the total consumption of milk and milk products was provided by the home

*Estimated Supplies of Live-stock Products in Great Britain,
June-May, 1934**

	<i>Home- pro- duction</i>	<i>Imports</i>	<i>Total supplies</i>	<i>Per cent. home- produced</i>
Meat:				
Beef and veal (000 cwt.) . . .	11,344	13,855	25,199	45
Mutton and lamb " . . .	5,633	7,080	12,713	44
Pigmeat " . . .	6,693	11,107	17,800	38
Milk and milk products, in terms of milk, million gallons. . .	1,584	2,801	4,385	36
Poultry and eggs:				
Poultry (000 cwt.) . . .	1,500	640	2,140	70
Eggs (millions) . . .	4,459	3,568	8,027	56
Wool (million lb.) . . .	43	550	593	7

* Allowances have been made, where data are available, for exports and re-exports and for imports into and from Northern Ireland.

output. Practically 100 per cent. of the liquid milk, about 6-9 per cent. of the butter, 24 per cent. of the cheese, and 80 per cent. of the cream were home-produced.

Home-production of poultry accounted for 70 per cent. of the total. Of eggs, including eggs not in shell, 56 per cent. were home-produced.

Retained supplies of home-produced wool accounted for only 7 per cent. of the total, a very large part of the home output being exported.

ii. *Crops.*

An estimate of the total supplies in the United Kingdom of the most important crops is given in the accompanying table. Home supplies are measured by the gross output of agricultural holdings in the United Kingdom, less exports,

while imported supplies are represented by imports less re-exports. Imports are taken for the periods which coincide most nearly with the marketing periods of the corresponding home crops. It must be borne in mind that the variation in

Estimated Supplies of Crops in the United Kingdom, 1933-4

	<i>Home- pro- duction</i>	<i>Imports</i>	<i>Total</i>	<i>Per cent. home- produced</i>
	000 tons	000 tons	000 tons	per cent.
Wheat*	1,481	6,021	7,502	20
Barley*	689	926	1,615	43
Oats*	2,180	257	2,437	89
Potatoes: Maincrop†	5,203	17	5,220	100
Earlies	295	144	439	67
Hops	12·8	1·4	14·2	90

* September–August.

† September–June; see p. 270.

crop yields from year to year may result in a fluctuating proportion of home-produced and foreign supplies.

About 20 per cent. of the total wheat supplies are home-produced, compared with 43 per cent. for barley and 89 per cent. for oats.

The figures for potatoes are less reliable, since neither the statistics of home-production nor of imports distinguish between maincrop and earlies, and approximate estimates must be made. Less than $\frac{1}{2}$ per cent. of the total supplies of maincrop potatoes were imported in 1933-4, compared with about 33 per cent. of the supplies of early potatoes in 1934.

3. Prices

(a) *General Commodity Prices*

General price movements in different countries show all possible variations during 1934; in some they have been stable. in others they have fallen, and in others they have

risen. On the whole, however, there has been greater general stability than in any other recent year, and the large number of factors which produced uncertainty in 1933 and the previous three years was greatly reduced. So long, however, as international trade remains at its present low level and exchanges are free to vary, internal trade and the monetary policies of the individual countries become the main price-influencing considerations, and the price levels in the different countries can diverge very considerably, dependent mainly on domestic conditions.

Prices in the countries remaining on the gold standard, excluding Germany and Italy, continued to decline with their concomitant features, trade depression, wage reductions, salary cuts, and so on. The index of prices in France fell 11 per cent. between January and December, and in Holland and Switzerland about 3 per cent. Prices in Italy, though nominally still on the gold standard, remained more or less steady throughout the year, the monetary system being almost completely detached from gold by an isolation policy and restrictions in the movement of gold. In Germany, prices rose by about 5 per cent. during the year; here again insulation has made the expansionist internal policy the principal factor affecting the general price level.

Prices in the United States rose about 8 per cent., partly as a result of further depreciation of the dollar and partly as a result of President Roosevelt's Government expenditure programme.

Wholesale prices in Great Britain reached their lowest point in March 1933. In January 1934 the *Statist* index of wholesale prices was 100·4 compared with 100 in the corresponding month of 1911-13; it fell to 96·8 in April, but thereafter prices moved slowly upwards until the index was 100·0 in August. At the end of the year it stood at 98·9, compared with 95·6 in December 1933. The average for the year was 98·3 compared with 95·7 for 1933, an increase of

2 per cent. There was, however, considerable variation between the prices of different commodities.

(b) *Retail Food Prices*

Retail prices of certain foods are collected and published by the Ministry of Labour, and are given in the Appendix, p. 384; they include imported as well as home-produced commodities, and these can be distinguished only for beef and mutton.

The fall in retail prices since 1921 has been considerably slower than in wholesale prices, and the Ministry of Labour's index of retail food prices has averaged about 30 points above the *Statist* index of wholesale prices. In 1931 the retail index was 131 compared with 100 in July 1914, while the wholesale index was 100; by 1933 the former had fallen a further 11 points, to 120, while the latter fell only by 4 points, to 96, so that the spread between the two had been slightly reduced.

For 1934 retail food prices in general were very slightly above those in 1933, particularly in the summer months, the index for the year being 122 compared with 120. Between January and May the index fell from 124 to 116; prices then rose steadily until in December the index was 127, compared with 126 in December 1933.¹

The higher level of retail prices during the year was due mainly to increased prices of milk, bacon, and mutton, and, in the latter half of the year, of potatoes.

Retail beef prices remained unchanged practically throughout the whole year except for a slight weakening at the end of the year. British ribs of beef averaged 1s. 2d. per lb. compared with 9d. for frozen; the former were 40 per cent. above pre-War, while the latter were 24 per cent. above. British mutton prices averaged about $\frac{1}{2}$ d. per lb. higher than in 1933, the increase being particularly marked in the spring and

¹ See Appendix. p. 384.

summer; frozen mutton prices were also higher for the year as a whole, and the index was 140 compared with 131 in 1933, and 144 for British mutton.

Bacon prices showed a considerable rise, the average representative price for 1934 being 1s. 1 $\frac{3}{4}$ d. per lb. compared with 11 $\frac{1}{2}$ d. in 1933 and 10d. in 1932; the corresponding index numbers were 122, 103, and 90.

Most of the rise in price occurred in imported bacon. Between the first quarter of 1933 and the last quarter of 1934 home-produced bacon prices showed little change, while Danish backs rose by 4 $\frac{1}{4}$ d. per lb., or 28 per cent., and Danish streaky bacon by 5 $\frac{1}{2}$ d. per lb., or over 50 per cent. The advantage of British over Danish sides was reduced from 6 $\frac{1}{4}$ d. per lb. in the first quarter of 1933 to 1 $\frac{1}{2}$ d. in the last

Retail prices per lb. of English and Danish Bacon in certain London stores, quarterly in 1933 and 1934.

	Backs			Streaky		
	English	Danish	Difference	English	Danish	Difference
1933	s. d.	s. d.	d.	s. d.	s. d.	d.
1st quarter	1 9 $\frac{1}{2}$	1 3 $\frac{1}{2}$	6 $\frac{1}{2}$	1 4 $\frac{1}{2}$	1 10	6 $\frac{1}{2}$
2nd quarter	1 10 $\frac{1}{2}$	1 5 $\frac{1}{2}$	5 $\frac{1}{2}$	1 5 $\frac{1}{2}$	1 11	6 $\frac{1}{2}$
3rd "	1 9	1 6 $\frac{1}{2}$	2 $\frac{1}{2}$	1 3 $\frac{1}{2}$	1 0 $\frac{1}{2}$	3 $\frac{1}{2}$
4th "	1 8 $\frac{1}{2}$	1 6 $\frac{1}{2}$	2	1 3	1 0 $\frac{1}{2}$	2 $\frac{1}{2}$
1934						
1st quarter	1 10	1 8 $\frac{1}{2}$	1 $\frac{1}{2}$	1 4	1 2 $\frac{1}{2}$	1 $\frac{1}{2}$
2nd "	1 10	1 6 $\frac{1}{2}$	3 $\frac{1}{2}$	1 3 $\frac{1}{2}$	1 1 $\frac{1}{2}$	2 $\frac{1}{2}$
3rd "	1 10 $\frac{1}{2}$	1 8 $\frac{1}{2}$	2	1 5	1 3 $\frac{1}{2}$	1 $\frac{1}{2}$
4th "	1 9	1 7 $\frac{1}{2}$	1 $\frac{1}{2}$	1 4 $\frac{1}{2}$	1 3 $\frac{1}{2}$	1 $\frac{1}{2}$

quarter of 1934, and of British over Danish streaky bacon from 6 $\frac{1}{4}$ d. to 1 $\frac{1}{2}$ d. These price movements show clearly that British and Danish bacon are not entirely competitive in the eyes of the consumer. Some substitution occurred, since the greater volume of home-production did not drive down the retail price of the home-produced bacon; none the less the

nain effect of the restriction of imported supplies was to ncrease the price of imported bacon.

Flour and bread were slightly dearer than in 1933, bread eing $\frac{1}{4}d.$ per loaf dearer in nine months out of the year. The iverage for the year was, however, the same— $7\frac{1}{2}d.$ per loaf ompared with $7\frac{1}{4}d.$ in 1932 and $7d.$ in 1930.

Milk is still relatively the dearest food, with the exception of fish, entering into the Ministry of Labour's Cost of Living budget. In 1934 the index was about 177, compared with an average index of 122 for the other foods. The average rice in 1934 was $6\frac{1}{4}d.$ per quart compared with $5\frac{3}{4}d.$ in 1933 and $6d.$ in 1932. During January and February the price vas $6\frac{1}{2}d.$, dropping to $6\frac{1}{4}d.$ at the beginning of March and April. From May until September the price was $5\frac{3}{4}d.$, but hen it rose again to $6\frac{1}{2}d.$ until the end of the year.

Butter and cheese prices were lower than in 1933. Fresh utter averaged $1s. 1d.$ per lb. compared with $1s. 2\frac{1}{4}d.$ in 933 and $1s. 4\frac{1}{4}d.$ in 1932. Salt butter was also lower, and, ike fresh butter, was cheaper than in July 1914, the respec- ive indices being 80 and 91. The fall was particularly marked n the earlier months of the year, recovering partially in the ater months.

Potato prices were higher during the last months of the ear and averaged $6d.$ per lb. compared with $5\frac{1}{2}d.$ in 1933 nd $8\frac{3}{4}d.$ in 1932, when the home-crop was small.

Egg prices showed the usual seasonal variation, declining rom $2d.$ each in January to $1d.$ in the spring; by the beginning of December they had risen to $2\frac{1}{2}d.$ The average for the year as the same as in 1933.

Prices of agricultural products in England and Wales as eported by the Ministry of Agriculture were higher than in 933 or 1932; they were still well above the wholesale prices of most other commodities, and, in fact, the gap was wider. While the general price level rose 3 per cent., the agricultural ndex rose 7 per cent. between 1933 and 1934; if wheat and

cattle payments are included, the agricultural index in 1934 was 119 compared with 98 for other commodities.

The divergence between the prices of cereals and of live-stock products, which had practically disappeared in 1933

Index Numbers of Wholesale and Agricultural Prices, 1925-34

(1911-13 = 100)

	'Statist' index of wholesale prices of all commodities	Agricul- tural products	Cereals	Live- stock products	Fruits and vegetables
1925-9	748	149	142	152	172
1930	115	134	106	147	121
1931	100	120	86	127	134
1932	96	112 [114]†	87	114	175
1933	95	107 [111]†	83 [113]†	115	143
1934*	98	114 [119]§	84 [114]†	121 [123]†	132

* Provisional.

† Including wheat subsidy.

‡ Including cattle payments.

§ Including wheat and cattle payments.

owing to the wheat payments, reappeared in 1934; the cereal index rose from 113 to 114, while the live-stock product index rose from 115 to 123, an increase of 7 per cent. The combined fruit and vegetable index fell 8 per cent.

Thirteen increases were recorded, for hay, wool, fat and store sheep, potatoes, pork, bacon and store pigs, oats, barley, milk, beans and peas, and vegetables; ten decreases occurred, fat and store cattle and dairy cows, eggs, poultry, cheese, butter, wheat, fruit, and hops. The price increases ranged from 1.4 per cent. for vegetables to 38.6 per cent. for hay, six of them being about 10 per cent. or greater. The price declines were all less than 10 per cent. except for hops, which declined by 36.9 per cent. from the extraordinary price of 1933.

The Ministry of Agriculture's index numbers of the prices

Monthly Index Numbers of the Prices of Agricultural Products in England and Wales, 1934.¹
(Corresponding months of 1911-13 = 100)

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	1934	1933
Wheat	59	60	58	57	59	67	66	64	68	67	66	66	64	70
Wheat (including deficiency payment)	136	135	135	132	132	120	118	119	118	127	127	130	125	128
Barley	117	113	111	103	98	96	98	123	127	111	104	104	100	100
Oats	80	91	87	84	81	83	83	92	92	94	94	95	88	80
Fat cattle	106	103	99	95	95	94	99	106	104	97	96	90	99	101
Fat cattle (including subsidy payment)	..	..	..	..	..	..	..	..	119	112	110	103	104	..
Fat sheep	117	112	118	128	150	138	128	128	124	128	123	119	127	110
Bacon pigs	125	129	127	125	117	110	105	103	102	99	103	107	112	102
Pork pigs	136	135	131	136	120	113	108	108	109	112	118	124	120	109
Dairy cows	105	101	101	103	100	101	104	104	105	107	105	103	103	109
Store cattle	90	92	86	84	87	85	85	85	88	85	82	82	83	109
Store sheep	93	91	91	95	103	109	108	104	113	114	107	98	86	88
Store pigs	163	159	143	137	134	135	135	139	142	143	147	148	144	124
Eggs	97	95	89	99	80	100	97	119	103	115	117	177	102	105
Poultry	115	118	126	110	120	126	114	116	113	110	114	110	120	126
Milk	166	161	141	168	162	162	168	168	168	161	161	171	103	150
Butter	92	86	84	91	85	87	87	92	87	84	83	82	87	94
Cheese	114	115	116	117	123	108	99	96	94	93	93	93	103	111
Potatoes	104	100	97	80	90	83	136	153	158	151	146	133	119	104
Hay	79	79	81	90	83	88	88	81	84	80	84	84	97	70
Wool	95	100	98	96	89	82	86	87	87	85	85	84	80	66
Hops	..	..	..	..	..	..	..	..	..	..	..	..	111	176
Fruit	..	..	..	..	..	..	..	..	..	..	..	..	129	143
Vegetables	..	..	..	..	..	..	..	..	..	..	..	..	143	141
All agricultural products (excluding payments)	1034	114	112	108	111	112	110	114	119	110	115	114	114	107
All agricultural products (including payments)	1033	107	106	102	105	102	100	101	105	107	109	110	..	107
All agricultural products (including payments)	1934	119	117	113	117	114	117	123	126	122	122	121	121	111
1933	111	110	106	109	105	104	104	108	111	112	114	115	..	111

¹ Agricultural Statistics and Agricultural Market Report.

of the more important products during 1934 are given in the accompanying tables, together with the indices for 1933. The combined index for all products in January 1934 was 119 compared with 111 in the previous January.

B. COMMODITIES

1. Meat

Cattle and Beef

Total supplies of beef and veal in Great Britain for June–May 1933–4, after allowing for exports and re-exports, may be taken as approximating 25,199,000 cwt., of which 45 per cent. was home-produced and 55 per cent. imported.¹

Home-production. The gross output of beef and veal from farms in Great Britain during 1933–4 is estimated at 11,344,000 cwt., which was 1 per cent. less than in 1932–3, though still 3 per cent. greater than in 1930–1.²

It is probable, however, that production for the calendar year 1934 was higher than in 1933–4, since the numbers of cattle in the June 1934 census were slightly greater than in 1933, and also the number of fat cattle sold on representative markets in England and Wales during 1934 was about 11 per cent. greater than in 1933.

Imports. Beef is imported in various forms but principally *Beef Imports into the United Kingdom, 1929–31 to 1934*

	Quantities				Per cent. of total	
	1929–31	1932	1933	1934	1929–31	1934
	cwt.	cwt.	cwt.	cwt.		
Chilled . . .	9,226,737	8,798,741	8,171,320	8,250,522	62.1	62.6
Frozen . . .	2,515,978	2,563,417	2,913,937	3,409,506	16.9	25.9
Tinned, &c. . .	1,000,838	804,912	923,356	1,014,739	7.3	7.7
Fresh and salted . . .	32,697	7,683	35,446	4,667	0.2	..
Total . . .	12,866,250	12,174,753	12,044,059	12,679,434	86.5	96.2
Live cattle equivalent	2,000,300	1,456,300	615,900	495,300	13.5	3.8
Total . . .	14,866,550	13,631,053	12,659,959	13,174,734	100.0	100.0

¹ See p. 213.

² See p. 208.

chilled, frozen, and on the hoof. Assuming imported live cattle to give a carcass weight of $5\frac{1}{2}$ cwt., total beef imports in 1934 were equivalent to 13,174,734 cwt.; this was about 514,775 cwt. more than in 1933, but 1,691,816 cwt., or 11 per cent., less than in 1929-31. The downward trend in the last two years has been very slight. The most marked changes have been the decline in live cattle and the growth in frozen beef imports.

In 1934 chilled beef represented 63 per cent. of the total, frozen beef 26 per cent., and live fat cattle 4 per cent.; other types such as tinned and canned beef, extracts and essences provided only about 8 per cent.

(a) *Live cattle.*

Supplies. Imports of live fat cattle, which are the closest competitors to home-produced beef, have declined rapidly in the last three years; since 1929-31 they show a decrease of 35 per cent. The bulk of the supplies are store cattle from the Irish Free State.

Canadian shipments during 1934 were subject to limitation by voluntary agreement.¹ Cattle from the Irish Free State were subject to duties under the Irish Free State (Special Duties) Act, varying from £1 5s. per head to £6 according to

*Imports of Live Cattle for Food into the United Kingdom,
1929-31 to 1934*

Source	Numbers				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
Irish Free State	774,500	625,887	582,174	458,164	98.6	90.0
Canada	10,728	16,724	51,433	51,373	1.4	10.0
Other Empire	554	..	..	..	..	..
Total	785,782	642,611	633,607	509,537	100.0	100.0

¹ *The Agricultural Register* 1933-4, p. 29.

the type and age,¹ they were also subject to compulsor quantitative regulation under the Agricultural Marketing Act, 1933.²

Prices. Fat cattle prices in England and Wales were slightl

*Prices of First Quality Cattle and Beef, 1927-9 to 1934**

	Fat cattle live cwt.	Beef				
		Scottish short- sides per lb.	English long- sides per lb.	English cow and bull per lb.	Argentine chilled hind- quarters per lb.	Australia frozen hind- quarters per lb.
	s. d.	d.	d.	d.	d.	d.
1927-9	52 7	10 $\frac{7}{8}$	8 $\frac{3}{4}$	6 $\frac{7}{8}$	7	5 $\frac{1}{2}$
1930	52 1	10 $\frac{1}{2}$	8 $\frac{3}{4}$	7 $\frac{1}{2}$	7 $\frac{1}{2}$	5 $\frac{1}{2}$
1931	47 6	10	8 $\frac{1}{2}$	6 $\frac{1}{2}$	6 $\frac{1}{2}$	4 $\frac{1}{2}$
1932	44 10	9 $\frac{1}{2}$	7 $\frac{3}{4}$	6	6 $\frac{1}{2}$	4
1933	39 10	8 $\frac{1}{2}$	7	5 $\frac{3}{4}$	5 $\frac{1}{2}$	3 $\frac{1}{2}$
1934	39 2	8 $\frac{1}{2}$	7	5 $\frac{1}{2}$	5 $\frac{1}{2}$	3 $\frac{1}{2}$

* From *Agricultural Statistics*, and the Ministry of Agriculture.

lower in 1934 than in 1933. The Ministry's index for the year was 99 compared with 101 in 1933, a fall of 2 per cent.

In January the average for first quality beef animals of the Shorthorn type was 40s. 11d. per live cwt.³ By April the price had declined by 1s. 9d., around which level it remained until July. After a rise to 40s. 7d. in August the price dropped as increased supplies of grass-fed cattle came into the market in November the price for first quality cattle was so low as 36s. 7d. In December it averaged 37s. 6d. The average for the year was 39s. 2d. compared with 39s. 10d. in 1933, a reduction of 2 per cent.

These prices do not allow for the subsidy payment under the Cattle (Emergency Provisions) Act, which amounted to about 5s. per cwt. on certain types of animal,⁴ starting on

¹ *The Agricultural Register*, 1933-4, p. 29.

² See p. 48.

³ See p. 221.

⁴ See p. 197.

1 September. If this be included, the index for fat cattle for the last four months of the year is raised from 97 to 111, or by 14 per cent., and the index for the year from 99 to 104.¹

Representative wholesale prices of home-killed beef are shown in the accompanying table. Scottish short-sides and cow and bull beef declined slightly, about 2 per cent., and English long-sides were unchanged. In 1934 they were 23 per cent., 24 per cent., and 20 per cent. respectively below their 1927-9 level, while fat cattle had fallen 26 per cent.

(b) *Chilled beef.*

Supplies. Imports of chilled beef totalled 8,250,522 cwt. in 1934, an increase of 79,202 cwt. over 1933, but 976,215 cwt., or 11 per cent., less than the average annual imports in 1927-9. The reduction was entirely in supplies from Argentina and Uruguay, which decreased by 1,243,576 cwt.

Imports of Chilled beef into the United Kingdom, 1929-31 to 1934

Source	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Argentina . . .	7,933,108	7,804,366	6,951,833	6,942,064	86.0	84.1
Brazil	479,432	481,151	517,022	509,103	5.2	6.2
Uruguay	813,529	503,855	560,392	560,997	8.8	6.8
Other Foreign . . .	..	..	..	..	..	..
Total Empire . . .	668	9,369	142,073	238,358	..	2.9
Total Foreign . . .	9,226,069	8,789,372	8,029,247	8,012,164	100.0	97.1
Total	9,226,737	8,798,741	8,171,320	8,250,522	100.0	100.0

Brazilian shipments increased slightly, but Empire supplies rose from an average of 668 cwt. to 238,358. The growth in Empire supplies is mainly from New Zealand. Commercial cargoes were successfully brought from this country for the first time in 1933 and rapid developments were expected to follow; the voyage took some 32-35 days, and it was stated

¹ See p. 220.

that the beef arrived in splendid condition and met a good market at 1*d.* to 1½*d.* per lb. higher than for frozen beef.

In 1934, 84 per cent. of the total chilled supplies came from Argentina, 7 per cent. from Uruguay, and 6 per cent. from Brazil; about 3 per cent. came from Empire sources.

Imports from foreign countries are not subject to tariff duties but only to quantitative regulation under the Ottawa Agreements Act and subsequent voluntary restriction.¹

Prices. Prices during 1934 were practically the same as in 1933, hind-quarters averaging 5⅞*d.* per lb.; during the year they ranged between 5⅝*d.* and 6½*d.* per lb. During the last three years the best Argentine chilled beef has brought slightly more than best home-produced cow and bull beef, the difference being greatest in the last four months of the year. But it does not approach the better classes of fresh British beef, being about 1*d.* to 2*d.* per lb. cheaper than English long-sides and 2½*d.* to 3*d.* cheaper than Scottish short-sides. Chilled beef prices have fallen since 1927-9 in spite of marked reductions in supplies, but only by 16 per cent. compared with falls of 20 to 26 per cent. for British beef, and 33 per cent. for frozen beef.

(c) *Frozen beef.*

Supplies. Imports of frozen beef and veal, which form about 26 per cent. of the total 'beef' imports, amounted to 3,543,327 cwt., an increase of 461,170 cwt. over 1933 and 914,151 cwt., or 35 per cent., over 1929-31. Foreign supplies, mainly from Argentine, Brazil, and Uruguay, decreased by 490,265 cwt., but Empire supplies, mainly from Australia and New Zealand, rose by 1,404,416 cwt. As a result, the proportion coming from the Empire rose from 51 per cent. in 1929-31 to 77 per cent. in 1934, Australia sending 44 per cent. compared with 36 per cent. and New Zealand 29 per cent. instead of 13 per cent. The increase since 1931 has

¹ See pp. 45-7.

completely reversed the downward trend in frozen beef imports which marked the years 1920-30, when the poorer quality frozen beef was giving place to the higher quality chilled beef.

*Imports of Frozen Beef and Veal into the United Kingdom,
1929-31 to 1934**

Source	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Australia	954,200	956,261	1,104,468	1,571,246	36.3	44.3
New Zealand	337,793	658,142	822,049	1,023,636	12.8	28.0
Other Empire	36,680	33,547	104,633	138,186	1.4	3.9
Argentina	782,485	662,442	694,700	544,323	20.8	15.4
Brazil	180,402	106,011	113,047	86,279	7.2	2.4
Uruguay	250,630	231,455	128,822	86,584	9.5	2.4
Other Foreign	78,007	52,378	53,538	93,073	3.0	2.7
Total Empire	1,328,652	1,647,950	2,092,050	2,733,068	50.5	77.1
Total Foreign	1,300,524	1,052,286	990,107	810,259	49.5	22.9
Total	2,629,176	2,700,236	3,082,157	3,543,327	100.0	100.0

* Including quarters and sides, boned beef, other descriptions, and veal.

Prices. Prices were remarkably steady during the year, averaging about 3½d. per lb. for hind-quarters compared with 3½d. in 1933, but compared with 1927-9, there was a decline of 33 per cent. Frozen beef fills the cheapest market, being about 2d. per lb. cheaper than English cow and bull beef, and about 5d. per lb. cheaper than the best types. It is improbable, therefore, that there would be any transference of demand to the better qualities of English beef if supplies of the cheaper frozen beef were curtailed and its prices raised.

(d) Tinned and canned beef, extracts and essences.

These types form a negligible part of the total imported supplies, amounting to 1,014,739 cwt. in 1934, or 7.7 per cent. of the total. This is more than in 1932 or 1933, but slightly less than the average imports in 1929-31.

Imports of extracts and essences of beef, and canned beef, are subject to the 10 per cent. duty under the Import Duties Act. Certain imports are now also subject to quantitative regulation.¹

Sheep, Mutton, and Lamb

Total supplies of mutton and lamb for consumption in Great Britain during 1933-4, allowing for exports, re-exports, and Northern Ireland supplies, approximated to 12,713,000 cwt., of which some 44 per cent. was home-produced and 56 per cent. imported.²

Home-production. The gross output from farms in Great Britain was 5,633,000 cwt. for the year ending 31 May 1934; this was 5 per cent. less than in the previous year, though still 35 per cent. above the 1930-1 output.³ Production moves in fairly well-defined periods of increase and decrease, and the sheep population appears to have reached a peak in 1932, a decline in numbers following in 1933 and in 1934 which is likely to continue. The number of fat sheep and lambs marketed on representative markets in England and Wales during 1934 was 2 per cent. less than in 1933.

Imports. Imported supplies of mutton and lamb are mainly frozen; fresh meat, tinned and canned meat, and live sheep

*Mutton and Lamb Imports into the United Kingdom,
1929-31 to 1934*

	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
Fresh	22,523	7,249	44,000	12,882	0.3	0.2
Frozen	6,374,365	6,927,074	6,652,769	6,479,517	93.7	94.4
Tinned and canned	43,199	39,573	54,002	47,005	0.6	0.7
Other descriptions	97,677	142,464	130,748	153,469	1.5	2.2
Total	6,537,764	7,116,360	6,881,519	6,692,873	96.1	97.5
Live sheep (at 52 lb. deadweight basis)	265,105	204,690	147,782	168,531	3.9	2.5
Total	6,802,869	7,321,050	7,029,301	6,861,404	100.0	100.0

¹ See pp. 48 and 50.

² See p. 218.

³ See p. 208.

constitute only a very small proportion of the total. Total imports in 1934 were 2 per cent. less than in 1933 and 6 per cent. less than in 1932. The bulk of the imports, 95 per cent. were frozen.

Live sheep and lambs.

Supplies. Apart from the home output, the only source of live sheep and lambs is the Irish Free State. During 1934 these numbered 362,989, practically all of which were fat; this was an increase of 44,690, or 14 per cent., over 1933 though still far below 1929-31 or 1932. Imported supplies of mutton, and lamb, coming from the Irish Free State totalled 12,882 cwt., a reduction of 71 per cent. from 1933.

Live sheep and lambs from the Irish Free State are subject to duties under the Irish Free State (Special Duties) Act 1932, amounting to 10s. per head; mutton and lamb carcasses are subject to a tariff of 10s. per carcass, sides 5s. per side and other kinds 40 per cent. *ad valorem*.

Prices. The Ministry's index of fat sheep prices in England and Wales for 1934 was 127 compared with 110 in 1933, a rise of 15 per cent.¹ The average price of first quality Down and Crossbreds in January was 10½d. per lb., and a rise in the first four months of the year brought the price up to 13d. in May.² A decline followed to 10½d. in September, but the year ended with an average of 11¼d. in December, compared with 10d. in 1933. For the year as a whole, fat sheep averaged 11d., compared with 9½d. in 1933, an increase of 11 per cent.

Fat lambs were also higher during 1934.³ Starting at 11½d. per lb. in January, prices rose rapidly to 16½d. in March declining again, as supplies increased, to 11¼d. for September to November. The December average was 11¾d. compared with 10¾d. in 1933. The average for the year was 13¼d. compared with 11¾d. in 1933, an increase of 13 per cent.

Store sheep showed a marked improvement in 1933, the

¹ See p. 220.

² See p. 221.

³ See p. 221.

index rising from 85 to 102.¹ There was little change in the position for the first four months of the year, but after that the index rose, with a drop of 104 in August, from 95 to 114

*Prices per lb. deadweight of First Quality Fat Sheep and Lambs, and Mutton and Lamb, 1927-9 to 1934**

	Fat sheep, Downs and Crossbreds	Fat lambs, all breeds	Scottish mutton	Lamb	
				British	New Zealand frozen
	d.	d.	d.	d.	d.
1927-9	14	17½	12½	14	10
1930	13½	17	12½	14½	9½
1931	11½	14½	10½	13	7½
1932	8½	11½	8½	10½	6½
1933	9½	11½	9½	10½	7
1934	11	13½	10½	11½	7½

* From *Agricultural Statistics* and Ministry of Agriculture.

in October, but this level was not maintained and the December index fell to 99.

The wholesale price of Scottish mutton averaged 10½*d.* per lb. in 1934 compared with 9½*d.* in 1933, an increase of 8 per cent. Averaging 9*d.* per lb. in January, it rose to 12½*d.* in May, declining thereafter to 9½*d.* in December, compared with 8½*d.* at the end of 1933. Prices of British lamb followed much the same course as fat lambs, and rose from 10½*d.* per lb. in January to 15*d.* in April; they then declined gradually to 9½*d.* in November. There was a slight recovery to 10*d.* in December. The average price for the year was 11½*d.* compared with 10½*d.* in 1933, a rise of 13 per cent.

Compared with 1927-9, fat sheep prices in 1934 were lower by 21 per cent., fat lambs by 23 per cent., Scottish mutton by 17 per cent., and British lamb by 16 per cent.

¹ See p. 220.

Frozen mutton and lamb.

Supplies. Imports of frozen mutton and lamb in 1934 amounted to 6,479,517 cwt., compared with 6,652,769 cwt. in 1933, a decrease of 173,252 cwt., or 3 per cent. Of this

Imports of Frozen Mutton and Lamb into the United Kingdom, 1929-31 to 1934

Source	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Australia . . .	977,668	1,152,092	1,304,357	1,627,885	15.3	25.1
New Zealand . .	3,169,593	3,906,842	3,735,093	3,554,511	49.8	54.9
Other Empire . .	1,041	958	3,107	242	..	..
Chile	308,611	296,147	264,650	206,325	4.8	3.2
Uruguay	358,128	162,869	171,961	138,386	5.6	2.1
Argentina	1,516,838	1,371,650	1,146,594	921,632	23.8	14.2
Other Foreign . .	42,515	36,516	26,947	30,536	0.6	0.5
Total Empire . .	4,148,273	5,059,892	5,042,617	5,182,638	65.1	80.0
Total Foreign . .	2,226,092	1,867,182	1,610,152	1,296,879	34.9	20.0
Total	6,374,365	6,927,074	6,652,769	6,479,517	100.0	100.0

total, 80 per cent. came from Empire sources, 55 per cent. from New Zealand, and 25 per cent. from Australia; Argentina was the principal foreign source, sending 14 per cent. The heavy decline of 447,557 cwt. since 1932 has been entirely due to the decline in foreign shipments; these dropped by 570,303 cwt. while Empire supplies rose by 122,746 cwt. Supplies in 1934 were only 105,152 cwt. greater than in 1929-31.

Imports from foreign sources have been subject to quantitative regulation since the end of 1932, while certain limitations were agreed for Dominion supplies.¹

Prices. New Zealand lamb prices averaged 7½d. per lb. in January and remained about that level until May; the June average was 8½d., after which prices declined slightly and in

¹ See pp. 49 and 50.

December averaged $7\frac{1}{4}d.$ per lb. The average annual price for 1934 was $7\frac{5}{8}d.$ compared with $7d.$ in 1933, a rise of 9 per cent.

Compared with 1927-9, prices were lower by 24 per cent. The margin between first quality British and New Zealand lamb averaged $4d.$ per lb. in 1927-9 in favour of the home product and has fluctuated between $3\frac{3}{8}d.$ and $5\frac{1}{2}d.$ in subsequent years; in 1934 it was $4\frac{1}{8}d.$ per lb.

Tinned and canned, &c. Imports of tinned and canned mutton and lamb declined from 54,002 cwt. in 1933 to 47,005 cwt., but were still slightly above the 1927-9 level; the bulk of these supplies come from Argentina, Australia, and New Zealand. Other descriptions such as tongues, hearts, livers, kidneys, &c. have been imported in increasing quantities in recent years, and totalled 153,469 cwt. in 1934. They are, however, an insignificant part of the total imports.

Imports of canned meat and extracts or essences from foreign sources are subject to a 10 per cent. *ad valorem* duty. Edible offals from the Irish Free State are taxed at the rate of 40 per cent. *ad valorem*.

Pigs and Pig Products

Total available supplies of pigmeat in Great Britain during the year June-May 1933-4 have been estimated to be 17,800,000 cwt., of which 38 per cent. was home-produced and 62 per cent. imported.¹

Home-production. The output of pigmeat from farms in Great Britain was estimated to be 6,711,000 cwt. in 1933-4, compared with 6,862,000 cwt. in the previous year and 5,247,000 cwt. in 1930-1.² It is not possible to subdivide the home output into pork and bacon production.

The output for the calendar year 1934 was greater than that for 1933. The number of pigs was larger than in 1933; the pigs marketed on representative markets in England and

¹ See p. 213.

² See p. 208.

Wales, largely destined for pork, were 3 per cent. higher; and bacon production was greater than in 1933.¹

The total bacon output for Great Britain for 1934 was 1,818,579 cwt., of which 1,567,755 cwt., or 86 per cent., was

Imports of Pigmeat, 1929-31 to 1934

	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Bacon	9,534,320	11,390,839	9,084,353	7,598,922	70.5	74.7
Hams	954,321	801,349	808,814	727,792	8.0	7.2
Fresh pork	322,810	262,151	194,695	143,783	2.7	1.4
Frozen pork <i>p.</i>	338,258	341,021	622,776	1,104,720	2.8	10.9
Salted	71,204	34,238	21,001	•	5.6	..
Tinned, canned, &c. . .	332,808	333,317	346,259	402,936	2.8	4.0
Total	11,553,637	13,162,015	11,137,898	9,978,153	96.4	98.2
Fat pigs, equivalent † . .	432,000	301,800	149,600	188,200	3.6	1.8
Total	11,985,637	13,464,715	11,287,498	10,166,353	100.0	100.0

• Not distinguished separately.

† Estimated at 140 lb. carcass weight and including live pigs from Northern Ireland.

derived from home pigs and 250,824 cwt. from imported pigs and carcasses. Northern Ireland output totalled 488,104 cwt. and net imports 8,379,102 cwt. Thus total United Kingdom bacon supplies for the year were 10,685,785 cwt., which approximates very closely to the figure of 10,670,000 cwt. recommended by the Reorganization Commission for Pigs and Pig Products.²

Imports. Total imported supplies of pigmeat in 1934 amounted to about 10,166,353 cwt. allowing for live pigs from Ireland; this was a reduction of 3,298,362 cwt. from the 1932 imports and 10 per cent. less than in 1933. Bacon accounted for 75 per cent. of the total imports of pigmeat and hams for 7 per cent.; the corresponding percentages in 1929-31 were 80 per cent. and 8 per cent. Fresh pork, salted pork,

¹ *Weekly Dairy Produce Notes*, vol. vi, no. 35, 25 January 1935.

² *Journal of the Ministry of Agriculture*, vol. xii, no. 11, February 1935.

and live pigs constituted smaller proportions of the total in 1934 than in 1929-31. Frozen pork rose from 3 per cent. to 11 per cent.

Porkers and Pork.

Pork supplies are largely home-produced, at least 50 to 60 per cent. of the home pigmeat output normally finding its way on to the pork market. Imports, fresh and frozen, totalled 1,248,503 cwt., an increase of 431,032 cwt. over 1933 and 587,435 cwt. over 1929-31. Fresh pork imports come entirely from the Irish Free State, while chilled and frozen come from New Zealand, the United States, and Argentina.

Until the beginning of 1935, imports of frozen pork were unaffected by either tariffs or quantitative regulation; Irish Free State supplies of fresh pork were subject to a duty of 16s. per cwt. or 40 per cent., whichever was greater, under the Irish Free State (Special Duties) Act, 1932.

Porker prices in 1934 were higher than in 1933, the Ministry's index for England and Wales rising by 10 per cent. from 109 to 120.¹ First quality porkers averaged 15s. 3d. per core in January, remaining above 15s. till March; prices then declined as demand dropped off and by July the price was 12s. 2d.² During the remainder of the year there was a rise as demand strengthened again, and by December the price had reached 14s. 7d., about 6d. per score less than in the previous December. For the year as a whole, the average was 13s. 9d. compared with 12s. 9d. in 1933, an increase of 8 per cent.

Pork prices showed very much the same movements throughout the year. British first quality pork opened the year at 9½d. per lb., declining to 7½d. in July; during the remaining months it rose again, and in December reached 11½d. The average for the year was 8½d. compared with 8¼d. in 1933, an increase of 6 per cent. Compared with 1927-9,

¹ See p. 220.

² See p. 221.

porker prices in 1934 were 22 per cent. lower, while pork was 21 per cent. lower.

Frozen pork, represented by New Zealand first quality, was also dearer than in 1933, in spite of a great increase in

*Prices of First Quality Pigs, Pork, and Bacon, 1927-9
to 1934**

	Pigs		Pork		Bacon	
	Porkers per score	Baconers per score	British per lb.	New Zealand per lb.	British Green Wiltshire per cwt.	Danish Green sides per cwt.
	s. d.	s. d.	d.	d.	s. d.	s. d.
1927-9	17 8	16 1	11½	..	125 0	104 0
1930	19 0	16 6	12½	9½	126 6	97 0
1931	14 3	11 10	9½	6½	95 0	66 0
1932	11 7	10 4	7½	6	86 6	61 6
1933	12 9	11 3	8½	5½	91 0	77 6
1934	13 9	11 8†	8½	6½	96 9	93 0

* From *Agricultural Statistics* and Ministry of Agriculture.

† Average price of Class I, Grade C pig, less levy deduction, paid under the Pigs Marketing Scheme.

supplies, averaging 6½d. per lb. compared with 5½d., an increase of 11 per cent. The seasonal variation is not nearly so marked as for fresh pork and the price remained relatively steady from January to August, and then increased, the rise being particularly marked in September and October. Except for 1932, the price margin between fresh and frozen pork has remained very steady at about 2½d. per lb.

Salted pork imports have declined continuously and are now negligible.

Baconers, Bacon, and Hams.

The United Kingdom production of bacon and hams was 2,306,683 cwt. in 1934; net imports totalled 8,379,102, so that home production formed about 22 per cent. of total bacon supplies in 1934, compared with 15 per cent. in 1930.

Compared with 1932, gross imports were reduced by 3,865,083 cwt. or 32 per cent.; foreign supplies declined by

*Imports of Bacon and Hams into the United Kingdom,
1929-31 to 1934*

Source	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Irish Free State	390,862	214,837	224,509	380,888	3.7	4.6
Canada	200,686	324,447	686,558	1,074,853	2.0	12.9
Other Empire	3,405	1,984	171	969	..	..
Denmark	6,146,984	7,676,741	5,524,407	4,287,836	58.6	51.5
U.S.A.	1,188,474	529,096	627,126	517,436	11.3	6.2
Netherlands	915,549	977,074	872,750	607,851	8.7	7.3
Poland	679,597	1,252,780	857,790	496,515	6.5	6.0
Sweden	502,356	423,670	402,012	296,641	4.8	3.6
Lithuania	147,027	512,007	415,520	251,572	1.4	3.0
U.S.S.R.	95,011	42,543	44,184	48,724	0.0	0.6
Argentina	80,068	88,645	72,590	48,002	0.7	0.6
Latvia	48,341	18,795	46,248	43,111	0.6	0.5
Estonia	37,932	82,032	62,978	50,675	0.4	0.6
Finland	13,435	38,203	50,776	24,138	0.1	0.3
Germany	16,957	1,588	26,474	51,317	0.1	0.6
Norway	387	203	25,985	24,901	..	0.3
Other Foreign	20,676	7,543	12,081	121,584	0.2	1.4
Total Empire	594,953	541,268	911,238	1,456,710	5.7	17.5
Total Foreign	9,893,694	11,059,920	9,041,929	6,870,393	94.3	82.5
Total	10,488,647	12,192,188	9,953,167	8,327,103	100.0	100.0

4,780,527 cwt. while Empire shipments rose by 915,442 cwt. Compared with 1933, imports declined by 16 per cent.

Denmark remained the principal source of bacon and ham imports, though shipments were 3,388,905 cwt. less than in 1932 and 22 per cent. less than in 1933. A further increase in Canadian supplies brought Canada to second place, providing 12.9 per cent. of the total compared with 2 per cent. in 1929-31; shipments increased from 200,686 cwt. to 1,074,853 cwt. Imports from the Netherlands and Poland were 30 per cent. and 42 per cent. less than in 1933; most other foreign supplies showed reductions. Increases were received from Russia, Germany, and a number of Central and Southern

European countries such as Yugoslavia, Austria, and Rumania.¹ Irish Free State supplies also rose.

Imports from foreign countries were subject to quantitative regulation under the Agricultural Marketing Act, 1933,² while Irish Free State bacon was dutiable at the rate of 40 per cent. *ad valorem* under the Irish Free State (Special Duties) Act, 1932.

Prices of bacon pigs in England and Wales were about 10 per cent. higher than in 1933; the Ministry's index increasing from 102 to 112.³

First quality bacon pigs under the Pigs Marketing Scheme⁴ averaged 11s. 8d. per score compared with 11s. 3d. for first quality pigs on the open market in 1933.⁵ Opening in January with a contract price of 12s., prices declined to 11s. 1d. (less levy) in September. There was, however, a recovery and in December the price was 11s. 9d. per score. 'Open market' prices of first quality baconers averaged 12s. 3d. for the year compared with 11s. 3d. in 1933, an increase of 9 per cent.⁶ The divergence was greatest in the opening months, when there is no doubt that curers had to enter the open market to make good the deficiencies in their contracted receipts. In March the market price was 13s. 10d. compared with the contract price of 12s. Towards the end of the year, however, contract prices were the higher.

Bacon prices were also higher than in 1933. The average wholesale price of British Wiltshire Green bacon at Bristol was 96s. 9d. per cwt. compared with 91s. in 1933, a rise of 6 per cent. In January the price was 91s., and it rose to 101s. in February; it then weakened to 86s. 6d. in May, rising again to 96s. 6d. in August. There was a rapid rise to 102s. 6d. in September followed by a drop to 94s. in December.

Imported bacon prices were much higher at the beginning of the year than at the beginning of 1933, but there was a

¹ See p. 52.

² See p. 51.

³ See p. 220.

⁴ Class 1, Grade C.

⁵ See p. 221.

⁶ See p. 221.

considerable decline in the Spring. Danish bacon fell from 101s. in February to 84s. 6d. in April, but rose again to the same figure as British Wiltshire, 102s. 6d., in September. At the end of the year, the price had dropped to 91s. For the year, prices averaged 93s. per cwt. compared with 77s. 6d. in 1933, a rise of 20 per cent.

The comparative price movements of Danish and British bacon are given in the table on p. 217. In 1927-9, British averaged 21s. per cwt. above Danish; in 1931 and 1932, when Danish supplies increased rapidly, the difference rose to 29s. and 25s. By 1933, however, it had declined to 13s. 6d., and in 1934 to 3s. 9d. For two or three months of 1934, it disappeared completely, and Danish was, for the first time, slightly higher priced than British.

According to the *Weekly Dairy Produce Notes*, ham prices were higher than in 1933, American hams having increased by 25 per cent., while home-produced rose by about 12 per cent.

2. Dairy Products

Liquid Milk

The output of milk from farms in Great Britain in 1933-4, exclusive of that fed to calves, has been estimated at 1,548 million gallons, or 8½ per cent. more than in 1930, and 20 per cent. more than in 1924-5.

Sales of milk off farms in 1933-4 totalled 1,277 million gallons, but it is not known how much of this was consumed liquid, part being manufactured into milk products. The last available data indicate that during the twelve months ending 31 May 1931 sales of liquid milk amounted to 946.9 million gallons.¹ Sales by the various Milk Marketing Boards are given elsewhere.²

Imports of milk are negligible.

¹ *Report of the Reorganisation Commission for Milk*, Ministry of Agriculture and Fisheries, Economic Series, No. 38, p. 199.

² See pp. 102, 106, 378, and 382.

Prices.

Throughout 1934, liquid milk prices in England and Wales and in Scotland south of the Grampians were controlled, respectively, by the Milk Marketing Board¹ and by the Scottish Milk Marketing Board.² In England, the Ministry of Agriculture's index of milk prices averaged 163 compared with 150 in 1933, an increase of 9 per cent.³

No comparison entirely satisfactory can be made of prices before and after the Scheme came into effect, for in the pre-Scheme days only some distributors paid the liquid prices agreed upon by the Permanent Joint Milk Committee, while since the Scheme has been in force, all buyers must pay the agreed price. The following table, however, shows the unweighted average prices paid in winter and summer under the Permanent Joint Milk Committee's agreement, and subsequently under the Milk Marketing Scheme in England and Wales. In the winter of 1933-4, liquid prices in the South-Eastern region averaged 1s. 4d. or about $\frac{1}{4}$ d. per gallon higher than in the previous winter, and only $\frac{1}{4}$ d. below the average from 1927-9. Prices in other regions averaged $\frac{1}{2}$ d. below those in the South-Eastern region. In the summer of 1934, liquid prices in the South-Eastern region averaged 1s. 0 $\frac{3}{4}$ d. or about $\frac{3}{8}$ d. per gallon higher than in the previous summer, and slightly above the average for 1927-9. In other regions prices were 1s. In the winter of 1934-5 prices were to be 1s. 4d. in all regions, representing an increase over the previous winter of $\frac{1}{2}$ d. per gallon in the South-Eastern region and 1d. per gallon in other regions. *

Average manufacturing prices in the winter of 1933-4 were 5 $\frac{1}{2}$ d. per gallon, or $\frac{1}{2}$ d. more than in the previous winter. The price of milk made into butter and cheese, however, was lower than in the previous winter. Compared with the average of 1927-9, the manufacturing price had fallen substan-

¹ See pp. 66-80.² See pp. 81-97.³ See p. 220.

tially, by 3d. per gallon, or 35 per cent., while liquid prices had been maintained. In the summer of 1934, the average manufacturing price, excluding the Government subsidy,¹ was 4½d., ⅓d. below the level of the previous summer, and

*Prices per gallon of Liquid and Manufacturing Milk,
1927-35.*

	<i>Liquid milk at buyers' station</i>		<i>Manufacturing milk at sellers' station</i>	
	<i>Oct.-Mar.</i>	<i>Apr.-Sept.</i>	<i>Oct.-Mar.</i>	<i>Apr.-Sept.</i>
	<i>s. d.</i>	<i>s. d.</i>	<i>d.</i>	<i>d.</i>
1927-8--1929-30	1 4½	1 0½	8½	8½
1930-1	1 4½	1 0	5½	4½
1931-2	1 2½	1 0½	4½	4½
1932-3	1 3½	1 0½	5	5
1933-4	1 4	1 0½	5½	4½
1934-5	1 4½	1 1½	..	..

3½d. lower than in 1927-9. Even including the Government subsidy prices averaged no more than 5½d. per gallon.

Cream

No reliable estimates can be made of sales of cream by farmers in 1934, though these amounted to 1,864,000 gallons in 1933-4. At the same time, sales of cream manufactured off the farm are not available for 1933-4, but amounted to 3,500,000 gallons in 1934. It is not permissible to combine these figures, since the proportions of cream made on and off the farm have probably changed substantially since the operation of the Milk Schemes.

Home production. The amount of milk sold for manufacture into fresh cream in the area of the Milk Marketing Scheme and of the Scottish Milk Marketing Scheme in 1934 was about 47.4 million gallons, while milk sold for manufacture into tinned cream amounted to about 7.6 million

¹ See p. 192.

gallons; the total sales were, therefore, about 40.3 million gallons. If it be assumed that 13.6 gallons of whole milk are used in 1 gallon of cream, then the home production of cream in these areas made by others than farmers amounted, in 1934, to a little under 3½ million gallons, or 93 per cent. more than the output in 1930-1.¹ The home output of cream showed two distinct peaks, one in the soft fruit season, and one at Christmas.

Imports. Gross imports of cream into the United Kingdom in 1934 totalled 85,354 cwt., equivalent to about 860,000 gallons of cream. If it be assumed that all these imports went to Great Britain, and if the important shipments of cream from Northern Ireland to Great Britain be ignored, then total cream supplies in Great Britain in 1934, excluding those made on farms, amounted to between 4½ and 5 million gallons, of which somewhat less than a fifth was imported.

Of the 85,354 cwt. of cream imported in 1934, 45 per cent. was fresh cream, coming almost entirely from the Irish Free State, and 55 per cent. was tinned cream, of which 95 per cent. was sent by Denmark. It is not possible, in previous years, to distinguish between fresh and tinned cream imports. Total cream imports were 44 per cent. less in 1934 than in 1929-31, and 23 per cent. less than in 1933.

Foreign imports have been subject, since March 1932, to a duty of 10 per cent. *ad valorem*, and since the middle of 1933 to progressive voluntary limitation, culminating for the major exporting countries in curtailment, in the last quarter of 1934, to 65 per cent. of the imports sent in the corresponding months of 1932.² They amounted, in 1934, to 45,984 cwt., 25 per cent. less than in 1933, and 40 per cent. less than the average of 1929-31. The decline between 1929 and 1931 was due mainly to the virtual elimination from the British market of

¹ *Report of the Reorganization Commission for Milk.* Ministry of Agriculture and Fisheries, Economic Series No. 38, 1933, p. 199.

² See p. 22.

cream from the Netherlands and other foreign countries apart from Denmark, which in 1929-31 had sent 12 per cent. and 5 per cent. respectively of total imports. Danish shipments had increased between 1929-31 and 1933, but fell

Imports of Cream into the United Kingdom, 1927-9 to 1934

Source	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Irish Free State	74,389	73,223	49,482	39,342	49·2	46·1
Other Empire	37	..	7	28	..	..
Denmark	50,728	60,160	58,566	44,732	33·5	52·4
Netherlands	18,606	2,905	2,153	1,242	12·3	1·5
Other Foreign	7,505	331	408	10	5·0	..
Total Empire	74,426	73,223	49,489	39,370	49·2	46·1
Total Foreign	76,839	63,396	61,127	45,984	50·8	53·9
Total	151,265	136,619	110,616	85,354	100·0	100·0

24 per cent. between 1933 and 1934 to a level 12 per cent. below the average of 1929-31.

Shipments from the Empire came almost exclusively from the Irish Free State, and have been subject, therefore, to a duty of 40 per cent. *ad valorem* since November 1932. During 1934 there has been, also, voluntary quantitative regulation.¹ Imports from the Irish Free State in 1934 amounted to 39,342 cwt., 20 per cent. less than those sent in 1933, and 47 per cent. below the average of 1929-31.

As a result of all these changes the Irish Free State sent 46·1 per cent. of total cream imports in 1934, compared with 49·2 per cent. in 1929-31. Denmark sent 52·4 per cent. instead of 33·5, and other foreign countries 1·5 per cent., compared with 17·3 per cent.

Prices.

No reliable cream prices can be stated, largely owing to the lack of uniformity in the types of cream sold. The price

¹ See p. 54.

charged by the Milk Marketing Board in England and Wales for milk made into cream was *9d.* per gallon from October 1933 to February 1934, and *7½d.* per gallon for the rest of that year. In the area of the Scottish Milk Marketing Scheme, milk for manufacture into cream was sold at *7¼d.* per gallon. Much difficulty was caused throughout the year by undercutting on the English cream market by the Scottish Board and by the Irish creameries. In August, an agreement was announced between the interested parties in England, Scotland, Northern Ireland, and the Irish Free State, establishing prices for fresh cream sold to wholesalers varying from *10s. 6d.* per gallon for English cream, *9s. 9d.* for Scottish, and *9s.* for Irish, to *8s.* for cream sold to cream-manufacturers. It was stated that Scottish and Irish cream was previously being sold at *6s.* per gallon.¹ Further agreements were subsequently negotiated.

Butter

Total supplies of butter in Great Britain, in 1934, may be taken as about 10,000,000 cwt., of which only 6-9 per cent. was home produced.

Home production. The output of farm butter in Great Britain for the year ending 31 May 1934 was estimated at 765,000 cwt., compared with 702,900 cwt. in 1930-1.² No estimate is available of the 1933-4 output of creamery butter, but the 1934 output in the areas of the two largest Milk Marketing Schemes amounted to about 190,800 cwt.,³ or about twice as much as in 1930-1. It is probable that since the Schemes came into force there has been a large decline in the

¹ *The Milk Trade Gazette*, vol. vii, no. 108, 1 September 1934.

² *The Agricultural Output of England and Wales, 1930-1*, Cmd. 4605, 1934, Ministry of Agriculture and Fisheries, and *The Agricultural Output of Scotland, 1930*, Cmd. 4496, 1934, Department of Agriculture for Scotland.

³ Output for December 1934 estimated. It is assumed that 264.1 gallons of milk = 1 cwt. of butter.

farm butter output and an increase in creamery butter. Just as for cream, it is difficult to obtain a reliable estimate of total butter supplies, but it may be assumed that the 1934 production of butter in Great Britain approximated between 400,000

Imports of Butter into the United Kingdom, 1929-31 to 1934

Source	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Australia	1,092,236	1,795,465	1,691,662	2,103,567	15.4	21.7
New Zealand	1,597,947	2,140,280	2,511,810	2,676,794	22.5	27.6
Irish Free State	489,723	314,633	378,662	468,381	6.9	4.8
Canada	26,107	19,299	33,253	54	0.4	..
South Africa	25,975	59,107	31,721	24,556	0.4	0.3
Other Empire	5,587	7,744	7,037	10,584	..	0.1
Denmark	2,329,541	2,583,664	2,519,126	2,485,810	32.8	25.6
U.S.S.R.	286,711	322,887	562,718	498,577	4.0	5.1
Sweden	246,533	175,771	226,777	302,206	3.5	3.1
Latvia	56,575	112,556	146,124	155,756	0.8	1.6
Netherlands	105,099	46,990	145,779	301,137	1.5	3.1
Finland	240,399	216,620	133,811	150,849	3.4	1.6
Lithuania	24,332	68,139	104,259	141,107	0.4	1.5
Estonia	110,652	83,153	83,361	122,919	1.6	1.3
Norway	6,737	14,938	3,294	100	0.1	..
Poland	55,667	3,094	217	50,167	0.8	0.5
Argentina	363,622	391,027	202,251	111,207	5.1	1.1
Other Foreign	29,638	9,069	49,836	98,957	0.4	1.0
Total Empire	3,237,577	4,336,558	4,654,145	5,283,916	45.6	54.5
Total Foreign	3,855,407	4,027,809	4,177,541	4,418,882	55.4	45.5
Total	7,092,984	8,364,367	8,831,686	9,702,818	100.0	100.0

cwt. and 700,000 cwt. In addition, about 150,000 cwt. of butter were made in Northern Ireland.

Imports. Gross imports of butter amounted to 9,702,818 cwt. in 1934, an increase of 871,132 cwt. or 10 per cent. over 1933 and 37 per cent. more than in 1929-31. The larger part of this increase came from the Empire. Between 1933 and 1934 foreign supplies rose by 6 per cent. Denmark, the largest foreign shipper, sent $1\frac{1}{2}$ per cent. less butter in 1934 than in 1933. The Netherlands, however, sent twice as much as in 1933, while Sweden, Latvia, Finland, Lithuania, and Estonia increased their shipments to a lesser extent, and

Poland reappeared on the market. Other European markets continued, during the year, to tighten their restrictions on imports, so that the United Kingdom had to absorb a greater proportion of the trade, in spite of the tariff of 15s. per cwt. imposed on imports from foreign countries. Exports from many European countries were encouraged by internal price-raising measures.

Imports from the Empire rose by 14 per cent. between 1933 and 1934. New Zealand sent only 7 per cent. more than in the previous year, following unfavourable weather conditions and declining production towards the end of 1934. None the less, for the first time, New Zealand butter was the largest supply on the British market, accounting for 28 per cent. of total imports, compared with 26 per cent. from Denmark. Australian shipments expanded rapidly under the stimulus of an export bounty, and were 24 per cent. greater than in 1933. The United Kingdom Government had requested these two Dominions, in 1933, to restrict their shipments, but during 1934 no export control was enforced.¹ Imports from the Irish Free State, in spite of a 40 per cent. *ad valorem* import duty, increased 24 per cent. between 1933 and 1934, but were still less than the average of the years 1929-31.

As a result of all these changes, Empire butter shipments increased from 46 per cent. of the total in 1929-31 to 53 per cent. in 1933 and 55 per cent. in 1934.

Prices.

The Ministry of Agriculture's index number of butter prices averaged 87 in 1934, compared with 94 in 1933, a decline of $7\frac{1}{2}$ per cent. First quality British farm butter averaged 13s. 9d. per 12 lb., or 128s. 6d. per cwt. in 1934, 7 per cent. lower than in the previous year, and 38 per cent. below the average for 1927-9. The decline in price must be

¹ See p. 55.

attributed to the increasing volume of total supplies; owing, however, to the smaller home output of farm butter, the spread between the prices of farm butter and Australasian butter increased, and the home price fell comparatively little. Farm butter prices showed the customary seasonal variation,

*Prices per cwt. of First Quality Butters, 1927-9 to 1934**

	British Farm		Danish		New Zealand		Australian	
	s.	d.	s.	d.	s.	d.	s.	d.
1927-9	206	6	187	6	176	0	172	0
1930	180	6	155	0	137	0	135	6
1931	158	6	135	0	120	0	116	6
1932	149	6	124	0	108	6	105	0
1933	137	6	108	6	87	6	87	0
1934	128	6	102	6	78	0	75	6

* From *Agricultural Statistics and Agricultural Market Report*.

falling from nearly 15s. 6d. per 12 lb. in January to 11s. 9d. in June, and then rising once more to 14s. 6d. in December. British creamery butter prices, however, fell from 1s. 3½d. a lb. in 1933 to 11½d.¹ in 1934, or 23 per cent., and averaged, in 1934, more than 2d. per lb. less than farm butter, whereas they had been about ½d. a lb. above farm butter in 1933. Creamery butter prices had fallen sharply on the introduction of the Milk Marketing Scheme, and had moved, subsequently, well below farm butter prices.

Danish butter prices, in 1934, averaging 102s. 6d. per cwt., were also only 6 per cent. less than in 1933, though 45 per cent. lower than in 1927-9. Supplies also were smaller in 1934 than in 1933. Prices fell sharply from 117s. in December 1933 to 97s. in January 1934, and continued very low until July, when they stood at 88s. 6d. Thereafter an unusually sharp recovery occurred, and in December 1934 Danish

¹ *Weekly Dairy Produce Notes*, Imperial Economic Committee, vol. vi, no. 34, 18 January 1935.

butter fetched 126s. 6d. per cwt., or 9s. 6d. more than a year previously.

New Zealand and Australian butter averaged 78s. and 75s. 6d. respectively, in 1934; these prices were 11 and 13 per cent. lower than in 1933, and 56 per cent. less than in 1927-9. The increasing volume of Australasian butter on the British market forced down all butter prices, but particularly New Zealand and Australian. The spread between English farm butter and New Zealand butter, which had averaged 30s. 6d. per cwt. in 1927-9, rose to 50s. in 1933 and 50s. 6d. in 1934. New Zealand butter, priced in January 1934 at 72s. 6d. per cwt., continued to realize exceptionally low prices throughout the summer. The heavy volume of imports checked the customary autumn rise in prices, and in August and September prices were no higher than 84s. and 82s. respectively. Thereafter, imports increased by smaller quantities than in the previous year, and by December prices had fallen only to 76s. per cwt.

Cheese

Total supplies of cheese in Great Britain in 1934 approximated about 3,960,000 cwt., of which 24 per cent. was home produced.

Home production. The operation of the Milk Marketing Schemes in England and Wales and in Scotland resulted last year in a substantial change-over from farmhouse to factory manufacture. The output of farmhouse cheese in the areas of the two principal Milk Marketing Schemes,¹ since the beginning of the scheme for subsidizing farmhouse cheese in March and April until the end of 1934, amounted to about 260,000 cwt., while the output in Great Britain in 1930-1 equalled 689,800 cwt.² The figure for 1934 is not quite comprehensive, but it is clear that there was a very large decline

¹ See p. 193.

² *Weekly Dairy Produce Notes*, Imperial Economic Committee, vol. vi, no. 35, 25 January 1935.

between the two years. The output of factory cheese under the Schemes amounted to about 710,000 cwt., compared with about 300,000 cwt. in 1930. Again the figures are not entirely comparable, but the magnitude of the change is clear. Total

Imports of Cheese into the United Kingdom, 1927-9 to 1934

Source	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
New Zealand	1,831,570	1,849,132	2,059,393	2,092,050	61.1	70.0
Canada	702,778	747,478	629,498	520,221	23.5	17.4
Australia	55,133	73,534	92,476	114,452	1.8	3.8
Other Empire	12,393	18,725	13,946	7,873	0.4	0.3
Netherlands	182,335	170,034	122,179	127,675	6.1	4.3
Italy	136,150	106,094	95,311	93,708	4.6	3.1
Switzerland	36,552	14,549	13,791	14,144	1.2	0.5
Other Foreign	40,471	23,547	17,856	18,444	1.3	0.6
Total Empire	2,601,874	2,688,869	2,798,313	2,734,596	86.8	91.5
Total Foreign	395,508	314,244	244,137	253,971	13.2	8.5
Total	2,997,382	3,003,313	3,039,450	2,988,567	100.0	100.0

home-produced cheese supplies in 1934 were thus about 970,000 cwt., or very little less than in 1930-1.

Imports. Imports of cheese in 1934 amounted to 2,988,567 cwt., almost the same as the average for 1929-31, but 2 per cent. less than in the previous year. Supplies from the main exporting countries have shown considerable stability from year to year. New Zealand, which sent 70 per cent. of the total in 1934, increased her shipments by $1\frac{1}{2}$ per cent. between 1933 and 1934, mainly in the early months of the year, while Australia sent 24 per cent. more than in 1933, accounting for 4 per cent. of the total. From Canada, on the other hand, imports continued their downward trend, and in 1934 were 17 per cent. lower than in 1933. Total supplies from the Empire were 5 per cent. greater in 1934 than in 1929-31, but 2 per cent. less than in 1933.

Foreign supplies, of which those from the Netherlands and Italy are the most important, increased 4 per cent. between

1933 and 1934, but were still 36 per cent. below average shipments in 1929-31. They were subject to a 10 per cent. duty.

As a result, supplies from the Empire accounted for 91.5 per cent. of total imports in 1934, compared with 86.8 per cent. in 1929-31.

Prices.

Cheese prices fell sharply between 1933 and 1934, except those of New Zealand and Canadian and English Dairy Cheddar cheeses, which declined to a lesser extent. The Ministry's index fell from 111 in 1933 to 103 in 1934, a decline of 8 per cent.¹ The price of ungraded Cheshire cheese, which probably includes factory cheese, averaged 64s. 6d. per cwt. in 1934, 16 per cent. lower than in the previous year, and 44 per cent. below the average of 1927-9. In the early months of the year prices were high, falling seasonally from 83s. in January to 50s. in June.² The customary winter rise was, however, much less than usual, and prices in December were 84s. per cwt. This fall occurred in spite of a decrease of 40 per cent. in the amount of cheese pitched at Chester, Nantwich, and Whitchurch cheese fairs. The price of Lancashire cheese followed much the same course, and averaged 62s. per cwt. over the year. Caerphilly, at Highbridge fair, averaged 47s. per cwt., being 27 per cent. less than in the previous year, and 53 per cent. lower than in 1927-9. The pitch at Highbridge fair was 12 per cent. below that of 1933.

English dairy Cheddar made higher prices in the early months of the year than in the corresponding period of 1933, probably owing to the drought in the previous summer. With the arrival of the new season's make prices fell unusually sharply, from 101s. 6d. per cwt. in May to 70s. in June.³ By December, they had only risen to 89s. per cwt., so that the average for the year, 87s. 6d., was 8 per cent. below that of

¹ See p. 220.

² See p. 221.

³ See p. 221.

the previous year, and 30 per cent. less than in 1927-9. The price of English factory Cheddar, however, partly in response to the larger output, fell 20 per cent. between 1933 and 1934, to 52s. per cwt., about half the price prevailing in 1927-9,

*Prices per cwt. of First Quality Cheeses, 1927-9 to 1934**

	<i>English Ungraded Cheshire</i>		<i>Caerphilly</i>		<i>English Cheddar</i>		<i>Canadian</i>	<i>New Zealand</i>				
	<i>s.</i>	<i>d.</i>	<i>s.</i>	<i>d.</i>	<i>Dairy</i>	<i>Factory</i>						
1927-9	115	6	100	0	125	6	103	0	105	0	98	6
1930	94	6	82	0	105	6	84	6	95	0	82	0
1931	94	6	75	6	97	0	70	0	75	6	63	6
1932	104	0	84	0	105	6	67	6	72	0	64	0
1933	76	6	64	0	95	6	65	0	65	6	52	6
1934	65	6	47	0	87	6	52	0	60	0	50	0

* From *Agricultural Statistics*, and *Agricultural Market Report*.

and only 2s. per cwt. more than the price of New Zealand cheese.

Canadian cheese averaged 60s. per cwt. in 1934, 8 per cent. less than in the previous year, and 43 per cent. lower than in 1927-9. The price was fairly constant throughout the year, rising gradually from 55s. 6d. in January to 62s. 6d. in June, falling again to 59s. in August, and finishing the year at 61s.

New Zealand cheese fell by the surprisingly small percentage of 5 between 1933 and 1934, partly as a result of speculation, and averaged 50s. per cwt., or 49 per cent. less than in 1927-9. Prices fluctuated between 47s. and 49s. per cwt. from January to May, rose seasonally to 55s. 6d. in November, and, with the arrival of the new season's make, fell to 48s. in December.

Processed Milk

Home production. The home production of condensed milk has increased rapidly since the introduction of the Milk

Marketing Schemes. Sales for manufacture in the areas of the English and Scottish schemes were equivalent to about 1,500,000 cwt., compared with an output in 1930, in factories in the United Kingdom employing ten persons or more, of 874,300 cwt.¹ The output of milk powder, on the other hand, declined, amounting to 125,000 cwt. in 1934, compared with about 134,000 cwt. in 1930.

Imports. Imports of condensed whole milk in 1934 were 464,803 cwt. Total supplies, therefore, were about 2,000,000 cwt., of which some 75 per cent. was home produced and 25 per cent. imported. Imports of sweetened milk powder, made from whole milk, were insignificant.

Imports of all forms of preserved milk declined in 1934, partly owing to the expansion in home production behind the tariff, and partly to voluntary quantitative restriction on supplies from foreign countries and the Irish Free State.²

There was a fall in the quantity of *sweetened* condensed whole milk imported during the year of 15 per cent., making 48 per cent. since 1929-31. Supplies from foreign countries, subject to a duty of 5s. per cwt., plus the duty on the sugar content, declined 7 per cent. between 1933 and 1934, and they accounted for 88 per cent. of the total in 1934, compared with 92 per cent. in 1929-31. Both the chief sources of supply, Holland and Denmark, but particularly the former, decreased their shipments. Empire supplies in 1934 came mainly from the Irish Free State, for Canada, which had sent substantial quantities in 1932 and 1933, sent little. Irish shipments, though subject to a duty of 10 per cent. *ad valorem*, increased 15 per cent. between 1933 and 1934.

Imports of *unsweetened* condensed milk were 341,841 cwt. in 1934, 10 per cent. less than in 1933, and 21 per cent. below the average of 1929-31. Foreign supplies, subject to a duty of 6s. per cwt., declined 14 per cent. between 1933 and 1934.

¹ *Weekly Dairy Produce Notes*, Imperial Economic Committee, vol. vi, no. 36, 1 February 1935.

² See p. 53.

and accounted for 62 per cent. of the total, compared with 94½ per cent. in 1929-31. The Netherlands, Denmark, and Belgium, the principal sources of supply, sent less. Supplies from the Empire, though slightly less than in 1933, were

*Imports of Condensed Milk, &c., into the United Kingdom,
1929-31 to 1934**

	Quantities				Percentage from Empire	
	1929-31	1932	1933	1934	1929-31	1934
Sweetened whole condensed.	cwt. 238,530	cwt. 205,413	cwt. 144,606	cwt. 122,962	7.8	11.6
Unsweetened whole condensed	430,404	397,229	380,851	341,841	5.5	37.7
Sweetened skimmed condensed	2,016,984	2,138,756	1,917,789	1,628,133	3.1	4.2
Milk powder (unsweetened)	288,693	320,312	280,082	252,549	48.7	69.6
Preserved milk other kinds (unsweetened)	4,228	6,054	1,359	363	(†)	(†)

* From *Dairy Produce Supplies in 1933*, and *Weekly Dairy Produce Notes*, vol. vi, No. 36, 1 February 1935, Imperial Economic Committee.

† Not available.

more than four times greater in 1934 than the average for 1929-31, owing to increased Canadian shipments.

Imports of *condensed skimmed milk* were 1,628,133 cwt. in 1934, a fall of 15 per cent. from 1933 and 19 per cent. from the average of 1929-31. Foreign supplies, subject to a duty of 10 per cent. *ad valorem* plus the duty on the sugar content, were 96 per cent. of the total in 1934 and 97 per cent. of the average of the years 1929-31. Shipments from both Holland and Denmark, the only important sources of supplies, declined.

Imports of *unsweetened milk powder*, 252,549 cwt. in 1934, were 10 per cent. lower than in 1933, and 13 per cent. less than the average of 1929-31. Foreign supplies, liable to the duty of 10 per cent. *ad valorem*, declined by about half between 1929-31 and 1934, owing mainly to lower shipments

from the Netherlands, the main source of supply. Empire shipments, on the other hand, were 25 per cent. more in 1934 than on the average of 1929-31, though 9 per cent. less than in 1933. New Zealand and Australia had both increased their shipments between 1929-31 and 1933, while Canada sent much the same amount as before, but between 1933 and 1934 imports from both Canada and Australia fell off.

Of the remaining kinds of unsweetened preserved milk, imports amounted only to 363 cwt. in 1934, compared with 1,359 cwt. in 1933 and an average of 4,228 cwt. from 1929-31.

Prices.

Prices for condensed milk are not available. Milk was sold for manufacture into condensed milk under the Milk Marketing Scheme at 6*d.* per gallon from September 1933 to the end of 1934, and into milk powder at 6*d.* per gallon from September 1933 to March 1934, and 4½*d.* per gallon for the rest of the year. Milk was sold for manufacture into condensed milk in Scotland in the summer of 1934 at amounts varying from 4*d.* to 5¾*d.* per gallon, and into milk powder at about 3½*d.* per gallon.

3. Eggs and Poultry

Eggs

Total supplies of eggs in Great Britain in 1933-4 were about 8,027 million, of which 56 per cent. were home produced and 44 per cent. imported.¹ For the calendar year 1934, United Kingdom home production was estimated to be 4,860 million² and imports of eggs in shell and not in shell about 3,420 million. According to these figures, home production was 59 per cent. of the total.

Home production. The output of eggs on agricultural holdings has more than doubled since 1924-5, and was 23 per

¹ See p. 213.

² *Weekly Dairy Produce Notes*, vol. vi, no. 34, 18 January 1935.

cent. greater than in 1930-1. The rate of increase, however, has begun to slacken, and production in 1933-4 was only about 1 per cent. greater than in 1932-3¹.

Duck eggs in 1933-4 on agricultural holdings in England and Wales amounted to 60 million, and in Scotland to 14 million, an increase of 4 per cent. on the output of 1930-1.

Imports. Imports of eggs in shell totalled 18,785,447 great hundreds in 1934, while imports of eggs not in shell were 840,712 cwt., the equivalent of about 9,903,000 great hundreds. Total imported egg supplies were thus equivalent to about 28½ million great hundreds.

Total imports of eggs in shell in 1934, 18,785,447 great hundreds, were 2 per cent. greater than in the previous year, though 27 per cent. less than in 1929-31. They were derived from over thirty countries, but nearly three-quarters of the total came from Denmark, the Irish Free State, Australia, and Poland, and 85 per cent. from these four countries and China and the Netherlands.

Foreign supplies increased by 5 per cent. between 1933 and 1934, to a level 35 per cent. lower than in 1929-31. Denmark, the most important single source, sent 2½ per cent. more in 1934 than in 1933, but 4 per cent. less than in 1929-31. Poland expanded her shipments by 16 per cent. between 1933 and 1934, to a level 33 per cent. below that of 1929-31. Imports from China, Finland, Sweden, Russia, Estonia, Lithuania, Roumania, and Hungary also increased, while Turkey sent eggs to this country in an appreciable quantity for the first time. Imports from the Netherlands and Belgium continued to decline.

Imports increased in spite of duties and voluntary quantitative limitations imposed on foreign supplies. Throughout the year there were duties ranging from 1s. to 1s. 9d. per great hundred, according to weight. On Danish 15 lb. eggs this amounted to about 8 per cent. *ad valorem* at the highest

¹ See p. 209.

monthly price in 1934, and to about 20 per cent. at the lowest. Further, the principal foreign countries were asked to restrict their shipments from the middle of March to the end of

*Imports of Eggs in Shell into the United Kingdom,
1929-31 to 1934 (in great hundreds)*

Source	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	gt. hds.	gt. hds.	gt. hds.	gt. hds.		
Irish Free State . . .	4,700,425	3,648,328	3,437,028	3,193,818	18.6	17.0
South Africa . . .	483,432	526,047	454,822	300,134*	1.9	1.6
Australia . . .	616,004	1,515,542	1,890,382	2,101,424	2.4	11.2
Canada . . .	46,889	5,426	182,895	177,001	0.2	0.9
Other Empire . . .	17,734	19,873	37,816	32,970	..	0.2
Denmark . . .	6,616,558	6,302,302	6,233,637	6,383,751	25.6	34.0
Poland . . .	2,894,791	1,874,311	1,680,894	1,943,774	11.2	10.3
Netherlands . . .	3,503,091	1,402,979	1,002,848	944,807	13.8	5.0
Belgium . . .	2,456,079	1,583,777	449,477	49,472	9.5	0.3
China . . .	1,611,280	850,023	1,396,639	1,437,786	6.3	7.7
Other Foreign . . .	2,714,008	1,876,067	1,597,039	2,221,110	10.5	11.8
Total Empire . . .	5,954,484	6,015,216	6,012,093	5,805,347	23.1	30.9
Total Foreign . . .	19,855,807	13,979,459	12,360,554	12,080,100	76.9	69.1
Total . . .	25,810,291	19,994,675	18,372,647	18,785,447	100.0	100.0

* Does not include any South-West African shipments.

September to the quantities sent in the corresponding period of 1933, and to send 5 per cent. less in the last quarter of 1934 than in the last quarter of 1933.¹

Imports from the Empire declined $3\frac{1}{2}$ per cent. between 1933 and 1934, and were $2\frac{1}{2}$ per cent. below those of 1929-31, due, almost wholly, to lower shipments from the Irish Free State. These were subject to a duty of 40 per cent. *ad valorem*, and, in addition, to the same voluntary restrictions as foreign supplies. In 1934 they were 7 per cent. less than in 1933, and 33 per cent. less than in 1929-31.

Other Empire supplies were subject neither to duties nor to quantitative restrictions. Australia is the only other Empire country to send important quantities of eggs to the United

¹ See p. 56.

Kingdom. In 1934, shipments from this source continued the sharp increase of recent years, and were 11 per cent. above those of the preceding year, and nearly $3\frac{1}{2}$ times as much as in 1929-31.

As a result of all these changes, the Empire sent 30.9 per cent. of the United Kingdom's imports of eggs in shell in 1934, compared with 23.1 per cent. in 1929-31.

Imports of eggs not in shell amounted to 840,712 cwt. in 1934, 30 per cent. more than in 1933 and 4 per cent. more than in 1929-31. They come almost entirely from China.

Prices.

In spite of increased supplies, egg prices declined only slightly, and in some months not at all, in 1934 compared with 1933. The Ministry's index fell from 105 to 102, a decrease of 3 per cent.¹ The declines were mainly in the first three months of the year, when imports were heavy. This maintenance of price must be attributed to the partial recovery in demand.

First quality British eggs at town and country markets averaged 13s. per great hundred in 1934, about 4 per cent. less than the previous year, and 32 per cent. lower than in 1927-9. The price fell seasonally from 13s. 9d. in January to 8s. 1d. in May, recovered to 21s. 3d. in November, and finished the year at 17s. 11d.² British National Mark Specials averaged 15s. 3d. per great hundred in 1934, being 2s. 3d. above the town and country market price, and 3 per cent. lower than a year previously.

Danish and Dutch eggs, the most important of imported supplies, were only on sale in quantity in the summer. Danish (15-16 lb.) eggs averaged 8s. 3d. per great hundred from March to August 1934, 4 per cent. less than in 1933 and 33 per cent. less than in the corresponding period of 1927-8, and this price was 4s. 9d. less than the price realized for

¹ See p. 220.

² See p. 221.

British eggs at town and country markets. Dutch eggs during the same months averaged 9s. 2d. per great hundred, the same price as in 1933, but 34 per cent. below the average of 1927-9.

Prices per Great Hundred of Eggs, 1927-9 to 1934

	<i>Average for year</i>				<i>Average for March-August</i>			
	<i>British First Quality</i>	<i>British National Mark Special</i>	<i>Danish 15-16 lb.</i>	<i>Dutch 15-16 lb.</i>	<i>British First Quality</i>	<i>British National Mark Special</i>	<i>Danish 15-16 lb.</i>	<i>Dutch 15-16 lb.</i>
	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>
1927-9	19 0	•	16 3	16 5	14 2	18 1	12 4	13 10
1930	17 3	19 11	•	13 10	13 4	15 9	11 6	11 1
1931	14 9	17 3	12 5	•	11 4	13 8	9 4	9 4
1932	13 9	16 2	•	•	10 8	12 6	8 10	8 11
1933	13 6	15 9	•	•	10 3	12 6	8 7	9 2
1934	13 0	15 3	11 2	•	10 0	12 0	8 3	9 2

• Not available.

Poultry

Total available supplies of poultry in Great Britain during 1933-4 have been estimated at 2,140,000 cwt., of which about 70 per cent. was home produced.¹ About 90 per cent. of the fowls, 25 per cent. of the turkeys, and 80 per cent. of the other poultry were home-produced.

Home production. Precise estimates of the home production of fowls are not possible. Fowls killed on agricultural holdings in England and Wales in the twelve months June-May were estimated by the Ministry of Agriculture at 30 million, 3 million greater than in 1932-3, and 8 million greater than in 1930-1. The Scottish output amounted to 2.3 million in 1933-4, so that the consumption of table fowls in Great Britain in 1933-4 was approximately 32 million, 35 per cent. greater than in 1930-1. Ducks, in 1933-4, were 2.7 million in England and Wales, 119,000 in Scotland, making 2.8 million in Great Britain; geese, 610,000 in England and Wales, 22,000 in Scotland, and 632,000 in Great Britain; and

¹ See p. 213.

turkeys, 650,000 in England and Wales, 65,000 in Scotland, and 715,000 in Great Britain. Thus the total home output of table birds from agricultural holdings in Great Britain in 1933-4 was about 36½ million. If 27 per cent. be added in England and Wales and 14 per cent. in Scotland to include birds from non-agricultural holdings, the figures are 40½ million fowls, 3½ million ducks, and rather less than a million each of geese and turkeys—about 46 million head of poultry in all. Putting the weight of a fowl at 3¼ lb., of a duck at 5 lb., of a goose at 10 lb., and of a turkey at 12 lb., then the weight of the home production of poultry in 1933-4 was 1,180,000 cwt. of fowls, 160,000 cwt. of ducks, 70,000 cwt. of geese, and 95,000 cwt. of turkeys, or about 1,500,000 cwt. in all.

Imports. Imports of dead poultry in 1934 were 144,891 cwt. of fowls, 261,137 cwt. of turkeys, and 45,957 cwt. of other kinds, or 451,985 cwt. in all. In addition, 567,521 head of poultry and game were imported alive, which cannot be segregated into the different kinds, but it is improbable that the weight exceeded 50,000 cwt. or fell short of 25,000 cwt.

Since 1933, imports of dead poultry have been separated into chickens, turkeys, and other kinds. In 1934, 51 per cent. of total imports consisted of turkeys, 32 per cent. of chickens, including fowls, and 17 per cent. of other kinds.

Imports of *turkeys*, of which some 60 per cent. entered the country in December, amounted in 1934 to 261,137 cwt., 2 per cent. more than in 1933. Foreign supplies fell 1 per cent., to 71 per cent. of the total. The small decline was due to decreased shipments from Hungary, the principal foreign source of supply, but Yugo-Slavia and Argentina, the next most important foreign sources, both sent more turkeys in 1934. The Import Duties Advisory Committee declined to consider an increase in the duty of 1*d.* per lb., until 1935. Imports of turkeys from the Empire, which came predominantly from the Irish Free State, were 11 per cent. greater in 1934 than in 1933, in spite of the duty of 5*d.* per lb. on Irish

shipments. In 1934, the Irish Free State sent a greater quantity of turkeys than Hungary.

Imports of *chickens* declined 27 per cent. between 1933 and 1934 to 144,891 cwt. Foreign shipments subject to a duty of

*Imports of Dead Poultry into the United Kingdom,
1929-31 to 1934*

Source	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Irish Free State	117,311	104,126	102,646	138,536	10.7	30.6
Other Empire	2,060	19,984	14,214	18,402	0.3	4.3
Hungary	82,765	105,863	171,240	127,026	13.9	28.3
U.S.S.R.	143,174	116,508	43,394	9,506	24.0	2.1
Yugoslavia	19,347	30,980	39,186	56,310	3.2	12.4
Netherlands	41,454	25,147	24,947	10,061	6.9	2.2
France	46,935	18,190	8,832	1,452	7.9	0.3
United States	12,385	2,594	11,697	8,718	2.1	1.9
Argentina	6,519	16,149	19,460	22,404	1.1	5.0
Other Foreign	124,593	74,147	64,799	58,670	20.9	13.0
Total Empire	119,371	124,310	116,860	156,938	20.0	34.7
Total Foreign	477,142	389,578	383,555	295,047	80.0	65.3
Total	596,513	513,888	500,415	451,985	100.0	100.0

3d. per lb. fell by 49 per cent. to 54 per cent. of the total. Hungarian supplies were nearly halved, Russia sent less than a quarter of the amount sent in 1933, and the Netherlands less than a half. Of the important foreign sources of supply, only Poland sent more in 1934. Imports from the Empire came mainly from the Irish Free State, and although the 4d. per lb. duty on Irish shipments was maintained, they increased by 66 per cent.

Imports of *other kinds* of poultry in 1934, 45,957 cwt., were practically the same in 1934 as in 1933. Foreign supplies declined 16 per cent. to 68 per cent. of the total. Hungary, the main foreign source, sent more, but the numerous other foreign supplying countries sent less. Foreign ducks and geese were subject to a duty of 3d. per lb. Shipments from

the Empire, principally from the Irish Free State, rose 76 per cent. between 1933 and 1934, though Irish shipments of ducks and geese continued to pay a duty of 4*d.* per lb.

Total supplies of dead poultry in 1934, 451,985 cwt., were 10 per cent. lower than in 1933, and 24 per cent. below the average of 1929-31. Foreign supplies amounted to 295,047 cwt., a fall of 23 per cent. compared with 1933, and 38 per cent. from the average of 1929-31. Imports from the Empire, on the other hand, which had decreased slightly between 1929-31 and 1933, rose 34 per cent. between 1933 and 1934 to 156,938 cwt., an amount 31 per cent. above the average of 1929-31.

Thus the Empire sent 35 per cent. of total imports of dead poultry in 1934, compared with 20 per cent. in 1929-31.

Imports of live poultry and game amounted to 567,521 head, 1 per cent. less than in the previous year, but only 43 per cent. of average imports in 1929-31. Live poultry from foreign countries pays a duty of 10 per cent., and from the Irish Free State one of 30 per cent., *ad valorem*.

Prices.

The Ministry of Agriculture's index number of poultry prices averaged 120 in 1934, compared with 126 in 1933, a decline of 5 per cent. The monthly index rose from 115 in January to 129 in May, and then fell to 110 in December.¹

The price of first quality fowls at country markets averaged 1*s.* 1*d.* per lb. both in 1933 and 1934, or 4*d.* below the average of 1927-9. The price rose from 1*s.* 1*d.* in January and February to 1*s.* 2*d.* in March and 1*s.* 3*d.* in April and May, and then fell to 1*s.* 2*d.* in June, 1*s.* 1*d.* in July, and 1*s.* for the rest of the year.² Ducks also averaged 1*s.* 1*d.* per lb., or 3*d.* below the average price from 1927-9. Monthly prices ranged from 1*s.* 4*d.* in April and May to 11*d.* from September to November. The price of geese, averaging rather under

¹ See p. 220.

² See p. 221.

rod. per lb., was about the same as in the previous year, and 2d. below the average of 1927-9. Turkeys, which had realized 1s. 4d. per lb. in December 1933, fell less than usual in the following month, and, at 1s. 3d. per lb. in January 1934, were

*Wholesale Prices per lb. of First Quality Poultry, 1927-29 to 1934**

	<i>Fowls</i>	<i>Ducks</i>	<i>Geese</i>	<i>Turkeys†</i>
	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>
1927-9	1 5	1 4	1 0	1 9
1930	1 4	1 4	1 1	1 6
1931	1 4	1 3	1 0	2 1
1932	1 2	1 1	1 1	1 7
1933	1 1	1 1	1 0	1 4
1934	1 1	1 1	1 0	1 2½

* Prices at country/markets, from *Agricultural Statistics* and the Ministry of Agriculture.

† December only.

2d. below the price in the preceding January. In December 1934 they realized 1s. 2½d. per lb., 1½d. less than in the preceding year and 31 per cent. below the average from 1927-9.

4. Crops

Wheat

Total supplies of wheat in the United Kingdom during the 1933-4 crop year may be taken as 150,040,000 cwt., of which 20 per cent. was home-produced.¹

The available supplies of wheat and flour in Great Britain for the calendar year 1934 were approximately 152,600,000 cwt., on the assumption that 38 per cent. of the 1933 home crop and 60 per cent. of the 1934 crop were used in 1934 and that imported wheat and flour, in terms of wheat, amounted to 117,382,000 cwt.

Home production. The 1934 wheat crop in Great Britain

¹ See p. 214.

was 37,180,000 cwt. compared with 33,320,000 cwt. in 1933, and a ten-year average of 26,440,000 cwt. for 1923-32.¹ This increase of 41 per cent. may be attributed directly to the effect of the Wheat Act. It is estimated that the supply of

*Imports of Wheat and Wheat Flour (in Terms of Wheat),
1929-31 to 1934*

	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Canada . . .	32,427,396	52,372,967	51,574,697	41,585,968	25·6	35·9
Australia . . .	18,862,776	28,048,992	33,079,522	24,349,024	14·9	21·0
India . . .	1,321,462	..	..	166,368	1·0	0·2
Other Empire . . .	236,185	39,227	407,517	10,291	0·2	..
Argentina . . .	28,055,266	21,280,364	25,207,120	35,424,361	22·1	30·6
U.S.A. . . .	21,787,525	5,277,334	170,165	309,918	17·2	0·3
U.S.S.R. . . .	15,882,730	3,274,960	5,754,291	2,095,212	12·5	1·8
France . . .	2,667,794	639,513	2,301,514	1,785,269*	2·1	1·5
Germany . . .	1,653,775	4,728,811	4,539,255	2,019,340†	1·3	1·8
Other Foreign . . .	3,989,366	1,821,538	3,012,032	8,028,297	3·1	6·9
Total Empire . . .	52,847,819	80,461,186	85,061,736	66,112,551	41·7	57·1
Total Foreign . . .	74,036,665	37,022,570	40,984,377	49,662,397	58·3	42·9
Total . . .	126,884,484	117,483,766	126,046,113	115,774,948	100·0	100·0

* Flour only.

† Wheat only.

home-grown millable wheat for the United Kingdom for the 1934-5 crop will be 32,000,000 cwt.²

Imports. Imports of wheat and wheat flour, in terms of wheat, were 115,774,948 cwt. compared with 126,046,113 cwt. in 1933, a reduction of 8 per cent. Wheat amounted to 102,652,387 cwt. and wheat flour to 9,448,244 cwt.

In 1934, 57 per cent. of the total supply came from Empire countries and 43 per cent. from foreign sources. Canada shipped 36 per cent. of the total, Australia 21 per cent., and Argentina 31 per cent. These three countries provided 88 per cent. of our total import requirements. Australia and

¹ See p. 207.

² The Wheat [Anticipated Supply] No. 1 Order, 1935. S.R. & O. 1935, No. 74.

Canada shipped less than in 1933, but Argentina, unable to keep within the quota allotted by the Wheat Advisory Committee, increased its exports to the United Kingdom from 25,207,120 cwt. in 1933 to 35,424,361 cwt. in 1934.

Empire supplies were 25 per cent. higher than in 1929-31, while foreign supplies had declined by 33 per cent. As a result of these changes, the Empire share of the wheat and flour imports rose from 42 per cent. to 57 per cent.

Wheat was included in the free list of the Import Duties Act, 1932, but a tariff of 2s. per cwt. was eventually placed upon foreign wheat under the Ottawa Agreements Act, 1932. Flour was subject to a 10 per cent. duty under the Import Duties Act; during 1934, an application was made to the Import Duties Advisory Committee for an increase in the rate, but this was refused.

Prices.

The Ministry's index number of wheat prices in England and Wales averaged 64 for the year, compared with 70 in 1933, a reduction of 8 per cent.¹ The 'Gazette' price in January was 4s. 4d. and this was maintained until the end of April. This stability resulted mainly from the selling policy of the Argentine Grain Board, which counteracted the attempts made in North America to peg prices at higher levels.

World wheat stocks, excluding Russia, had reached the unprecedented level of 1,097 million bushels on 1 August 1933, 10 per cent. more than in the previous year.² The 1933 world crop, excluding Russia, was 3,643 million bushels, or 2½ per cent. below the average of the three preceding years;³ this decline, however, was entirely insufficient to offset the depressing effect of heavy stocks and the decreased demand

¹ See p. 220.

² *The World Wheat Situation 1933-4*, Wheat Studies of the Food Research Institute, vol. xi, no. 4, December 1934.

³ *Monthly Crop Report*, International Institute of Agriculture, January 1935.

of most European importing countries which had artificially raised domestic prices above the world level and fostered home production. By August 1934, therefore, world stocks had reached 1,141 million bushels, 4 per cent. higher than the record level of the previous year.

After April prices began to rise, spectacularly in some countries, in anticipation of a short world wheat crop following the drought, which was particularly severe in North America; it was expected even that the world surplus might be wiped out by the end of the 1934-5 season. The 'Gazette' wheat price rose from 4s. 8d. in May to 5s. 4d. in June and July.¹

It was soon realized, however, that although wheat yields would be reduced, the available stocks would be more than sufficient to fill consumption requirements. With reassuring crop reports, prices weakened, and by December the 'Gazette' price had fallen to 4s. 10d., compared with 4s. 5d. in December 1933.

The latest estimate of the 1934 world crop, excluding Russia, is 3,310 million bushels, 9 per cent. below the 1933 crop.² Reuter's estimated visible supplies in January 1935 were 473.6 million bushels, or 9 per cent. below the level a year earlier, while it is estimated that stocks, surplus to normal requirements, will be reduced to 290 million bushels by the end of July 1935, compared with 580 million bushels in July 1934.³

Though market wheat prices in 1934 were estimated at 4s. 10d., deficiency payments under the Wheat Act have raised the prices of millable wheat for the British farmer to practically double these prices. The 1933-4 crop brought him about 9s. 6d. per cwt. on addition of the deficiency pay-

¹ See p. 221.

² *Monthly Crop Report and Agricultural Statistics*, International Institute of Agriculture, vol. xxvi, no. 1, January 1935.

³ *The Times' Annual Financial and Commercial Review*, 12 February 1935.

ment.¹ Taking this into account, the Ministry's wheat index for 1934 is raised from 64 to 125.²

It has been estimated that the average 1934-5 price of millable wheat in England and Wales will be 5s. per cwt., and a deficiency payment of about 4s. 2½d. may be expected, bringing the return on the 1934-5 crop to 9s. 2½d., a reduction of 3½d. per cwt. compared with the previous crop.³

Barley

Total supplies of barley available for consumption in the United Kingdom during the 1933-4 crop year may be taken as 32,300,000 cwt., of which 43 per cent. was home produced.⁴

Available supplies in Great Britain for 1934 may be taken as approximately 32,300,000 cwt., assuming that 29 per cent. of the 1933 home crop and 65 per cent. of the 1934 crop were utilized in 1934, and that imports provided 16,083,000 cwt. after allowing for alterations in stocks at ports.

Home production. The barley output in Great Britain was 16,340,000 cwt., compared with 13,760,000 cwt. in 1933 and a ten-year average of 20,220,000 cwt. in 1923-32. Though the 1934 crop was thus 19 per cent. greater than in 1933, it was still about 19 per cent. less than the ten-year output.

Imports. Imports in 1934 were 15,564,599 cwt., compared with 15,984,783 cwt. in 1933; 85 per cent. came from foreign sources and 15 per cent. from the Empire. Larger supplies were received from Canada, Persia, Chile, and Argentina. United States imports did not decline so much as was expected in view of the shortage of cereals in that country, though much of the supply is Californian malting barley and would not be expected to be used for feeding. It is not known what proportions of the home crop or of the imported supplies are used for malting and for feeding.

Under the Import Duties Act barley was subject to a 10 per cent. *ad valorem* duty; in August 1933 an additional

¹ See p. 201.

² See p. 220.

³ See p. 201.

⁴ See p. 214.

duty of 10 per cent. was placed on pearled and pot barley, but barley meal or flour, bran, dust, husks, and grits were exempted. At the close of the year an application was made

Imports of Barley into the United Kingdom, 1929-31 to 1934

Source	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Australia	197,219	312,406	586,488	581,220	1·4	3·7
Canada	916,299	2,442,751	825,208	1,370,732	6·5	8·8
Other Empire	159,402	133,552	9,526	402,357	1·1	2·6
U.S.S.R.	3,836,077	2,726,482	3,913,135	783,882	27·0	5·0
Roumania	1,578,013	529,471	3,120,429	1,188,872	11·1	7·7
Persia	1,031,026	1,483,332	1,424,278	3,330,024	7·3	21·4
U.S.A.	3,742,330	1,595,241	2,781,299	2,391,456	26·3	15·4
Chile	430,136	259,560	526,225	782,067	3·0	5·0
Argentina	137,291	318,432	1,568,482			1·0
Other Foreign	2,177,919	276,801	1,229,713	4,733,989	15·3	30·4
Total Empire	1,272,020	2,888,799	1,421,222	2,354,309	9·0	15·1
Total Foreign	12,032,792	7,289,319	14,563,561	13,210,290	91·0	84·0
Total	14,205,712	10,178,118	15,984,783	15,564,599	100·0	100·0

for a duty of 2s. 6d. per cwt. on barley and 5s. on pearled barley and other barley products.

Prices.

The Ministry's index number of barley prices was 109 in 1934, compared with 100 in 1933, an increase of 9 per cent. The 1933 crop was selling at 9s. 4d. per cwt. in January 1934 and by June it had fallen to 7s. 1d.¹ The new crop brought 10s. 7d. per cwt. in September, compared with 10s. 9d. in September 1933. The usual seasonal decline followed, and by December the price had dropped by 2s. to 8s. 7d. The corresponding decline in 1933 was 1s. 7d. The average price for the year was 8s. 8d., compared with 7s. 11d. in 1934.

English malting barley, in January, was 8s. 10d. compared with 7s. in January 1933, and this price was more or less

¹ See p. 221.

maintained until May. The crop was of a high quality, and the September price, at Hull, was 10s. per cwt., compared with 8s. 7d. in September 1933; by the end of the year, however, it had dropped to 7s. 8d., compared with 8s. 1d. in

*Prices, per cwt., of Wheat, Barley, and Oats, 1927-29
to 1934**

	Wheat		Barley				Oats	
	Gazette	Gazette	Malting	Feeding	Imported	Gazette	Imported	
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	
1927-9	10 5	10 7	11 4	9 7	9 10	9 5	9 8	
1930	8 0	7 11	8 7	6 8	5 8	6 2	6 2	
1931	5 9	7 11	8 11	6 2	5 0	6 3	6 1	
1932	5 11	7 7	8 0	6 9	6 5	7 0	7 1	
1933	5 4	7 11	7 5	5 11	5 1	5 7	5 10	
1934	4 10	8 8	8 8	6 7	6 0	6 3	6 10	

* From the *Agricultural Statistics and Agricultural Market Report*.

December 1933. The average for the year was 8s. 8d., compared with 7s. 5d. in 1933.

Efforts have been made to obtain an undertaking from brewers to use a fixed proportion of home-produced barley in brewing and to publish returns of the quantity. A 'gentleman's agreement' was entered into in 1933, to use as much British barley as was possible. Farmers were dissatisfied with the efficacy of the agreement in raising prices, and during the year various recommendations were made for a tariff on imported barley; but feeders of livestock raised the usual objections.

English feeding barley, at Hull and London, was 11 per cent. higher in 1934 than in 1933. The September price was 7s. 8d. per cwt. compared with 6s. 5d. in September 1933. By the end of the year the price was 6s. 3d., compared with 6s. 2d. in the previous year. Imported feeding barley averaged 6s., compared with 5s. 1d. in 1933, an increase of 18 per cent.

Oats

Total supplies of oats in the United Kingdom were 48,740,000 cwt. in 1933-4, of which 89 per cent. was home produced.¹

Imports of Oats into the United Kingdom, 1929-31 to 1934

Source	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Canada	802,752	2,479,949	1,269,425	1,041,279	9.5	60.4
Irish Free State	389,066	47,653	46,015		4.6	
Other Empire	7,036	45,477	8,163	14,654	0.1	0.5
U.S.S.R.	1,854,426	113,357	763,767	490,496	22.0	15.2
Germany	1,856,792	86,043	307,550	64,041	22.0	2.1
Chile	509,351	236,239	154,337	222,935	6.8	6.9
Argentina	2,591,617	3,155,952	2,702,557	416,473	30.7	14.3
Other Foreign	367,019	306,279	367,937	18,577	4.3	0.6
Total Empire	1,108,854	2,573,079	1,323,603	1,955,033	14.2	60.9
Total Foreign	7,239,205	3,898,770	4,296,128	1,257,522	85.8	39.1
Total	8,438,059	6,471,849	5,619,731	3,213,455	100.0	100.0

Great Britain's supplies for the calendar year 1934 may be taken as 38,850,000 cwt., on the assumption that 53 per cent. of the 1933 home crop and 48 per cent. of the 1934 crop were used in 1934 and that, after allowance for changes in stocks at ports, available imports were 3,513,000 cwt.

Home production. The output of oats in Great Britain was 35,220,000 cwt., compared with 38,400,000 cwt. in 1933 and 41,580,000 cwt. in the ten years 1923-32, or 8 per cent. below 1933 and 15 per cent. below the ten-year average.

Imports. Imports of oats were 3,213,455 cwt., a reduction of 2,406,276 cwt. or 43 per cent. from 1933 and 62 per cent. from 1929-31. About 61 per cent. came from Empire sources, almost entirely from Canada, and 39 per cent. from foreign countries, notably Russia and Argentina. Foreign supplies, which were 7,239,205 cwt. in 1929-31, declined to

¹ See p. 214.

1,257,522 cwt. in 1934; Empire supplies rose from 1,198,854 cwt. to 1,955,933 cwt.

Originally foreign oats were subject to a 10 per cent. *ad valorem* tax under the Import Duties Act, which was raised to 20 per cent. in August 1933. In January 1934 the duty on oats in grain was altered to 3s. per cwt. and to 7s. 6d. per cwt. on oatmeal and other oat products except husks, dust, and husks meal.

A voluntary agreement was arranged with Canada to limit their exports of oats and oat products for the years August 1933 to July 1935.¹

Prices.

The Ministry's index number of the price of oats in England and Wales averaged 88, compared with 80 in 1933, an increase of 10 per cent. The 'Gazette' price in January 1934 was 5s. 6d., and it rose suddenly to 6s. 5d. in February. Prices weakened slightly during the next two months but they recovered gradually, and in December were 6s. 8d., compared with 5s. 3d. at the end of 1933. The average for the year was 6s. 3d., compared with 5s. 7d. for 1933, an increase of 12 per cent. Prices of imported feeding oats rose from 5s. 10d. to 6s. 10d., an increase of 17 per cent.²

Main-crop Potatoes

The United Kingdom supply of main-crop potatoes for the 1933-4 year may be taken as 5,220,000 tons, of which only 17,000 tons were imported.³

The potatoes consumed in 1934 came from the 1933 and 1934 crops, which were 4,555,000 tons and 4,464,000 tons respectively. If the percentage of stocks of potatoes remaining on farms in England and Wales, as estimated by the Ministry of Agriculture, be applied to Scotland, then 51.4 per

¹ See p. 59.

² See pp. 220, 221, and 267.

³ See p. 214.

cent. of the 1933 crop, and 48.3 per cent. of the 1934 crop, or 4,497,000 tons in all, of home-produced potatoes were consumed in 1934.

Home production. No figures are available to segregate the home production of main-crop and early potatoes. This year,

*Estimated Acreages of Early and Main-crop Potatoes in
Great Britain, 1934*

Variety Group	Acreage on holdings with more than 1 acre			Per cent. of total acreage
	England and Wales	Scotland	Great Britain	
First Earlys . . .	62,100	16,000	78,100	14.4
Second Earlys . . .	38,500	13,800	52,300	9.7
Main crop . . .	324,900	86,200	411,100	75.9
Total . . .	425,500	116,000	541,500	100.0

however, there are available for the first time, as a result of the census taken by the Potato Marketing Board, figures of the acreages planted with the different kinds in Great Britain in 1934. Main crops accounted for 76 per cent. of the total acreage.

The acreage in 1933 was exceptionally high, but in 1934 it declined by 6½ per cent. The 1933 and 1934 crops of 4,555,000 tons and 4,464,000 tons, respectively, were 16 per cent. and 13 per cent. in excess of the production in the preceding ten years.

Imports. Imports of all potatoes into the United Kingdom in 1934 totalled 154,000 tons, or only 3 per cent. of the total available supplies of 4,651,000 tons. It is not possible exactly to separate main-crops from earlys. In *Weekly Fruit Intelligence Notes*, however, an estimate is given of the monthly imports of earlys from the principal supplying countries. Subtracting these it appears that imports of main-

crop potatoes in the season September–June 1933–4 was 17,000 tons, or less than $\frac{1}{2}$ per cent. of the home crop.

Imports of main-crop potatoes were only about a sixth as great in 1933–4 as in the three seasons 1928–9 to 1930–1. In

*Imports of Main-crop Potatoes into the United Kingdom,
1928–29 to 1930–1, and 1931–2 to 1933–4**

	Quantities				Per cent. of total	
	1928–9 to				1928–9 to	
	1930–1	1931–2	1932–3	1933–4	1930–1	1933–4
Irish Free State .	000 cwt. †	000 cwt. 649	000 cwt. 264	000 cwt. 120	% †	% 35·4
Netherlands .	673	4,912	549	213	36·4	62·8
Germany .	673	5,018	1	..	36·4	..
France .	79	127	..	..	4·3	..
Belgium .	†	3,261	22	1	†	0·3
Other countries .	424	1,901	21	5	22·9	1·5
Total .	1,849	15,868	857	339	100·0	100·0

* For method of calculation, 1928–9 to 1931–2, see *Agricultural Register*, 1933–4, p. 165; for 1933–4 and 1934–5 imports of early potatoes are obtained from *Weekly Fruit Intelligence Notes*, and subtracted from total imports to obtain imports of main-crop potatoes. The figures are liable to a substantial degree of error. † Included in 'Other Countries'.

1931–2 the home crop was small, prices were high and imports increased greatly. During the last two seasons French shipments were excluded owing to the danger of infection from the Colorado beetle.

The large home crop and consequent low prices, the £1 per ton import duty on foreign supplies, and the 10 per cent. *ad valorem* tax on imports from the Irish Free State combined to reduce imports. Actual imports were less than the amounts permitted under voluntary quantitative restrictions.¹

From September to December 1934, imports amounted to

¹ See p. 58.

63,874 cwt., about a third of those sent in the preceding year, and less than 3 per cent. of the average of 1929-31; 63 per cent. came from the Netherlands and 33 per cent. from the Irish Free State.

Throughout the months September to December a £1 per ton duty was in force. Voluntary limitation of imports was also arranged in September and October,¹ and, from 8 November imports from foreign countries and the Irish Free State were prohibited except under licence.

Prices.

The wholesale average price of King Edward VII and Majestic potatoes for 1933-4 was 79s. a ton, or 25 per cent. less than the average for the seasons 1927-8 to 1929-30, mainly as

*Average prices per ton of First and Second Quality Main-crop Potatoes, Seasons of 1927-8—1929-30 to 1934-5**

	Wholesale		Growers'	
	s.	d.	s.	d.
September-May				
1927-8 to 1929-30 . . .	105	6	78	6
1930-1 . . .	128	3	106	6
1931-2 . . .	192	0	163	9
1932-3 . . .	85	3	66	0
1933-4 . . .	79	0	59	9
1934-5† . . .	106	6	81	6

* From *Agricultural Statistics*, and Ministry of Agriculture.

† Four months.

a result of the heavy supply. Growers' prices, f.o.r. Wisbech, were 19s. 3d. lower. Wholesale prices rose gradually from 73s. 3d. in September to 81s. 9d. in November, and then declined to 76s. in March. With the imposition by the Potato Marketing Board of a larger riddle prices rose in April and finished the season, in May, at 81s.

The 1934 main crop was expected to be substantially

¹ See pp. 58-9.

lighter than that of the previous year, and wholesale prices opened the season in September at 117s. 3d. a ton. The warm weather and the higher yield caused a fall, however, to 95s. 3d. in December, which the imposition of a larger riddle by the Potato Marketing Board checked but did not reverse. Wholesale prices for the four months averaged 106s. 6d. per ton, almost the same as in 1927-9, and 35 per cent. above those in the last four months of 1933. Growers' prices were 25s. per ton lower than wholesale.

Early Potatoes

Total supplies of early potatoes in the United Kingdom for 1934 were estimated at 439,000 tons, of which 67 per cent. were home produced.¹

Imports. Imports were 2,874,000 cwt., 12 per cent. less than in the preceding year, or 46 per cent. below the average of 1929-31. If it be assumed that the home production of earlies amounted to 6.6 per cent. of the total potato crop, or 5,892,000 cwt., then imports accounted for about a third of

*Imports of Early Potatoes into the United Kingdom, 1929-31, 1932, 1933, and 1934**

	<i>Quantities</i>				<i>Per cent. of total</i>	
	<i>1929-31</i>	<i>1932</i>	<i>1933</i>	<i>1934</i>	<i>1929-31</i>	<i>1934</i>
	000 cwt.	000 cwt.	000 cwt.	000 cwt.	%	%
Channel Islands .	1,075	1,010	1,390	1,302	20.2	45.3
France . .	2,197	..	..	..	41.4	..
Spain .	1,174	3,185	1,504	1,165	22.1	40.5
Canary Islands .	182	249	79	162	3.4	5.6
Netherlands	423	900	247	184	8.0	6.4
Other countries	263	1,025	55	65	4.9	2.2
Total .	5,314	6,369	3,275	2,874	100.0	100.0

* From the *Weekly Fruit Intelligence Notes*, vol. viii, No. 25, 1934; and from the *Monthly Trade and Navigation Accounts*.

¹ See p. 214.

total supplies, as in the previous year, compared with about one-half of the years preceding 1933.

The decline in imports in 1934 was largely in Spanish supplies. These fell from 3,185,000 cwt. in 1932 to 1,504,000 cwt. in 1933 and 1,165,000 cwt. in 1934. French shipments were still excluded owing to the Colorado beetle. Shipments from the Channel Islands, the other principal source of supply, declined only slightly.

Imports from foreign countries were limited by quotas, and from the Channel Islands they were controlled by voluntary agreements.¹ As, however, the important shipping countries sent less than the agreed quotas, the decline must rather be attributed to the heavy tariffs in force,² and to decreased plantings in exporting countries. The rates of duty amounted to 4s. 8d. per cwt. from 1 November to 30 June, 2s. per cwt. in July and August, and 1s. per cwt. in September and October.

Prices.

Early potato prices averaged nearly 32s. a cwt. from April to July, 29 per cent. more than in the previous year, and only 8 per cent. less than the average from 1927 to 1929. Prices

Wholesale Prices per cwt. of Early Potatoes in England and Wales, 1927-9 to 1934*

	Channel Islands			Sharpe's Express		April-July†
	April	May	June	July	August	
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
1927-9 . . .	81 0	30 6	14 2	7 9	5 6	34 7
1930 . . .	58 6	21 6	9 0	7 7	5 5	24 2
1931 . . .	70 0	43 0	18 0	10 5	6 7	35 4
1932 . . .	59 6	42 6	20 0	8 5	4 9	32 7
1933 . . .	53 0	27 0	12 9	6 0	4 0	24 8
1934 . . .	71 0	34 0	14 4	8 5	6 9	31 11

* From *Agricultural Statistics and Agricultural Market Report*.

† Unweighted.

¹ See p. 58.

² See *The Agricultural Register*, 1933-4, p. 169.

in all months of 1934 were higher than in the previous year, but compared with 1927-9 they were relatively higher in the later months of the season. This change in the seasonal fluctuations was due to the disappearance from the market of French early potatoes, peak shipments of which came in June, and the influence of Spanish supplies, shipped in greatest quantities in May.

The improvement in prices must be attributed partly to lower supplies and partly to greater demand. Imports were about 12 per cent. lower than in the preceding year, and home production may have been less, as the yield was light. The efforts of the Potato Marketing Board to improve marketing intelligence may also have had its effect.

Hops

Home production. The home production of hops in 1934 was estimated at 259,000 cwt., compared with 216,000 cwt. in 1933, an increase of 20 per cent. Acreage rose 7 per cent. in response to the high prices prevailing in 1933 and to the security offered by the Hops Marketing Scheme, while yield also increased. About 92 per cent. of the crop was sold through the Hops Marketing Board.

Production, Imports, Exports, and Prices of Hops, 1927-9 to 1934

	<i>Home production.</i>	<i>Imports October- September</i>	<i>Exports October- September</i>	<i>Price per cwt.</i>
	cwt.	cwt.	cwt.	s.
1927-9 . . .	285,000	78,770	18,078	142
1930	253,000	47,655	23,134	80
1931	169,000	42,743	17,151	110
1932	188,000	15,797	21,444	177
1933	216,000	58,311	13,032	302
1934	259,000	27,163*	2,259*	180

* October to December.

Imports. The high price fixed for the crop of 1933 attracted heavy imports, amounting to 58,311 cwt. in the season 1933-4. These were nearly four times as great as in the preceding season, though 26 per cent. below imports in 1927-8 to 1929-30. Exports amounted to 13,032 cwt., a fall of 39 per cent. from 1933. Prices for the 1934 crop were lower, and imports in the last three months of the year amounted to 27,163 cwt., a fall of 33 per cent. Exports, at 2,259 cwt., were 18 per cent. more than in the corresponding period of the previous year. Throughout the period imported hops were subject to a duty of £4 per cwt.

Prices.

Brewers paid an average price of £15 2s. per cwt. for the 1933 crop. This price was 71 per cent. higher than in the previous year, and more than twice as high as the prices realized from 1927 to 1929. As a result of the deliberations of the Provisional Joint Hop Committee, average prices for the 1934 crop were fixed at £9 per cwt.¹

Sugar Beet

Home production. The acreage, production, and certain financial statistics of the home beet-sugar industry in 1934 are given in the table on page 277, together with the corresponding statistics for previous years.

The contract terms for the 1934 crop² were satisfactory to growers, for the acreage in Great Britain rose to a record level.³ In Scotland the area rose appreciably as the result of the new contract, which gave further concessions in transport.

¹ See p. 181.

² *The Agricultural Register*, 1933-4, p. 176.

³ See p. 300.

The large acreage, the excellent yield per acre and good sugar content, resulted in record figures. The total production of beet was rather more than 4 million tons, and of sugar 608,000 tons. The Subsidy amounted to £4,400,000,¹ which was equal to £10 18s. per acre, or 21s. 9d. per ton of beet.

Sugar Beet: Production and Financial Statistics: Great Britain, 1928-30 to 1934

	Average 1928-30	1931	1932	1933	1934*
A. Production:					
Area of beet . . .	252,507	234,174	255,648	365,774	403,884
Number of growers . .	32,556	32,897	34,452	39,828	..
Acres per grower . . .	7.8	7.1	7.4	9.1	..
Tonnage of beet . . .	2,144,622	1,667,288	2,232,061	3,298,119	4,050,000
Yield of beet per acre, tons . . .	8.5	7.1	8.7	9.0	10.1
Sugar content, per cent. of beet . . .	17.2	17.3	16.9	16.4	17.0
Sucrose per acre, lb. . .	3,265	2,759	3,305	3,312	3,846
Sugar produced, tons . .	300,419	251,760	330,325	463,039	608,000
Sugar produced, per cent. of beet . . .	14.0	15.1	14.8	14.0	15.0
Extraction per cent. of sucrose . . .	81.5	87.0	88.0	86.0	88.0
Sugar produced per acre, lb.	2,663	2,408	2,894	2,836	3,473
B. Financial:					
Subsidy, total . . .	£4,399,749	£5,790,063	£2,376,932	£3,387,000	£4,400,000
Subsidy per acre . . .	£17 8s.	£7 13s.	£9 6s.	£9 5s.	£10 18s.
Subsidy per ton of beet . . .	41s. 0d.	21s. 6d.	21s. 4d.	20s. 6d.	21s. 9d.
Subsidy per ton of sugar . . .	£14 13s.	£7 2s.	£7 4s.	£7 6s.	£7 5s.
Paid to growers:					
total	£5,495,333	£3,529,000	£4,762,000	£6,528,000	..
per acre	£21 15s.	£15 1s.	£18 12s.	£17 17s.	..
per ton of beet	51s. 3d.	42s. 4d.	42s. 8d.	39s. 7d.	..
per ton of sugar	£18 4s.*	£14 0s.	£14 8s.	£14 2s.	..
C. General:					
Number of factories . . .	19	18	17	18	18
“ “ days worked	91	64	80	107	..
“ “ workers employed in factories . . .	8,975	7,900	8,100	9,000	..

* Provisional.

¹ The total Subsidy for 11 years to 1934-5 is given on p. 203.

A statement of the financial position of the factory companies up to the end of March 1934 showed that the total expenditure on plant, machinery, and equipment, less depreciation, was £5,195,364. The balance sheets for the three years ending 31 March 1934 were as follows:

Summary of Balance Sheets of British Beet-sugar Companies as at 31 March 1932, 1933, and 1934

	As at 31 March		
	1932	1933	1934
<i>Liabilities:</i>	£	£	£
Share Capital	4,445,954	4,445,954	4,445,954
Mortgages and Debentures	1,545,951	1,479,536	1,384,522
Banks and other Loans	902,050	821,901	1,083,148
Sundry creditors and out-standings	722,573	736,859	1,050,702
Reserves	1,447,717	1,392,555	1,473,392
Profit and Loss balances before appropriation of dividends, less deficits	402,060	331,083	520,500
Total Liabilities	9,466,305	9,207,888	9,958,218
<i>Assets:</i>			
Beet-sugar factories and equipment, less depreciation	5,632,172	5,372,308	5,195,364
Investments	820,462	815,287	854,501
Stocks and stores	1,960,294	1,896,353	2,362,025
Sundry debtors and prepayments	601,066	538,055	980,107
Cash balances	452,311	585,885	566,221
Total Assets	9,466,305	9,207,888	9,958,218

The following table gives income, costs, profits, and appropriations of all the factories for the two years ending 31 March 1933, expressed per ton of beet:

British Beet-sugar Factory Income, Expenditure, and Profits—2 years to 31 March 1933

<i>Income, Expenditure, and Profit</i>	<i>Per ton of beet</i>	
	<i>1931-2</i>	<i>1932-3</i>
	<i>s. d.</i>	<i>s. d.</i>
Net income from sugar (less excise duty)	34 5	34 0
Molasses	5	10
Pulp	4 8	5 4
	39 6	40 2
Add Subsidy	21 6	21 4
Total income	61 0	61 6
Less cost of beets	42 4	42 8
Balance to factories	18 8	18 10
Less manufacturing costs and overhead charges	15 6	12 11
Trading profit	3 2	5 11
Profit on subsidiary industries	9	3 (loss)
Total profit	3 11	5 8
<i>Appropriation of Profit.</i>		
Interest charges	10	10
Directors' fees	3	3
Depreciation	2 4	2 6
Income Tax	6	4
Dividends	2 4	2 2
Reserves	2	1 0
Other appropriations	8	..
	7 1	7 1
Less transfer from reserves and amounts taken from credit balances	3 2	1 5
	3 11	5 8
Tons of beet produced	1,667,288	2,232,061

During the year, the British Sugar (Subsidy) Act, 1934, was passed to extend the Subsidy period on home-grown sugar by eleven months to 31 August 1935 at the rate of 6s. 6d. per cwt. of sugar.

It was a condition of continuing the assistance to the industry that the manufacturers, refiners, and growers should prepare schemes under the Marketing Acts to regulate the future of the industry. The manufacturers and refiners submitted a Scheme for the regulation of the marketing of sugar, and the National Farmers' Union, on behalf of growers, submitted one for the regulation of the marketing of sugar beet in Great Britain.¹

At the same time, more permanent arrangements had to be made for the future of the industry, and in the spring the Minister appointed a Sugar Industry Inquiry Committee, under the Chairmanship of Mr. Wilfred Greene, K.C., to consider the condition of the sugar industry in this country and to make recommendations for its future.² It had not reported by the end of the year, and on 6 February 1935 the Minister of Agriculture announced a further continuation of the Subsidy to cover the 1935 sugar-beet crop. Two new features are introduced: (i) the assistance is to be limited to the produce of 375,000 acres, which the growers are expected to provide at a price 1s. per ton below that offered in fixed price contracts in 1934; (ii) the rate of assistance of 5s. per cwt. of white sugar is related to a raw sugar price of 4s. 6d. per cwt. with adjustments up or down with the price of sugar. The position is to be further considered on receipt of the Greene Committee's report, and appropriate allowances are to be made for capital services, if found necessary. These allowances are conditional upon acceptance by the industry of any measures of reform which may be proposed by the Government.

Supplies. In the *calendar* year 1934 the home production of sugar was 318,058 tons of raw and 242,548 tons of white sugar, equivalent to a total of 549,474 tons of white sugar, which compares with 192,258 tons of raw and 228,430 tons of white, a total of 413,959 tons of white, in the previous year.

¹ See p. 158.

² See p. 190.

Home production in 1934 was approximately 20 per cent. of requirements.

Imported supplies were 39,437,852 cwt., being less by 1,349,353 cwt. than in 1933, but slightly more than in the base period 1929-31. The decline was due to a diminution in foreign supplies of nearly 4.8 million cwt., which more than offset an increase in Empire supplies of a little over 3.4 million cwt. All the principal sources of foreign sugar sent smaller supplies.

Imports of Sugar into the United Kingdom, 1929-31 to 1934

	Quantities				Per cent. of total	
	1929-31	1932	1933	1934*	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Australia	4,249,497	4,124,352	2,964,733	6,913,180	10.9	17.5
Mauritius	3,771,856	3,888,767	4,160,832	4,357,254	9.7	11.0
South Africa	2,193,490	998,873	1,594,988	1,624,467	5.6	4.1
British West Indies	1,012,742	2,454,078	3,000,526	2,798,139	2.6	7.1
British Guiana	591,427	1,529,424	1,655,764	1,606,416	1.5	4.3
Fiji Islands	491,770	1,012,010	1,168,870	1,325,608	1.3	3.4
Other British	1,079	766	124,140	283,606	. . .	0.7
Cuba	12,774,723	15,425,981	12,876,174	10,886,867	32.7	27.6
Europe	4,247,532	2,389,395	1,026,290	†	10.9	†
St. Domingo	3,819,416	5,519,467	3,101,363	2,089,826	9.8	7.6
Peru	2,799,906	3,684,133	4,127,734	2,927,721	7.2	7.4
Java	1,205,351	4,942,481	1,059,214	392,245	3.1	1.0
Brazil	642,329	522,024	644,069	461,734	1.6	1.2
U.S.A.	428,847	499,764	466,445	†	1.1	†
Mexico	72,870	12,883	1,375,327	†	0.2	†
Other Foreign	693,985	566,633	531,627	2,780,780	1.8	7.1
Total Empire	12,311,860	14,008,270	15,578,962	18,908,679	31.6	48.2
Total Foreign	26,695,959	33,562,761	25,208,243	20,439,173	68.4	51.8
Total unrefined	37,880,432	47,013,986	40,167,353	38,419,477	97.1	97.4
Total refined	1,127,387	557,045	619,852	1,018,375	2.9	2.6
Total all countries	39,007,819	47,571,031	40,787,205	39,437,852	100.0	100.0

* Provisional.

† Included in 'other foreign'.

Supplies from Europe, which used to form a very large proportion of the requirements of this country, have fallen very considerably in recent years, due to the operation of the Chadbourne restriction scheme, to the devaluation of British currency in terms of gold, and to the preferential tariffs on Dominion and Colonial sugar entering this country. The

striking feature of sugar supplies is the very large increase in Empire supplies, which were 50 per cent. greater than in the base period 1929-31, and now form 48.2 per cent. of total imports as against 31.6 in that period.

An International Conference was held in London from 5 to 10 March, under the Chairmanship of the Under-Secretary of State for the Colonies (Lord Plymouth), to examine the desirability of summoning a more representative Conference of all exporting and importing countries for the purpose of arriving at an International Sugar Convention for ensuring a better organization of world production and marketing of sugar. The Conference was called at the request of the International Sugar Council, the Executive body of the nine countries (Germany, Czechoslovakia, Poland, Hungary, Belgium, Yugoslavia, Cuba, Java, Peru) which are parties to the Chadbourne plan for the limitation of production of sugar in their respective countries. All the countries in the plan, with the exception of Germany, were represented, as well as the United States and Great Britain. No definite conclusions were reached.

A variation in the amount of the preferences on Colonial sugar was made by the Finance Act 1934 (Section 1), with the object of regulating the trade in Colonial sugar. The fall of the exchange value of the dollar in Canada in 1933, where there was a preference of 1 dollar per 100 lb. on imported Colonial sugar, made it probable that the whole of the Colonial sugar exports, part of which went to Canada, would be diverted to this country, as it would profit Canadian refiners to buy foreign sugar rather than to pay the equivalent of the United Kingdom price for Colonial sugar. Such dislocation was considered undesirable, and the Government decided to prevent it by adjustments in the preferential duties, calculated to maintain the trade to Canada and at the same time the value of existing preferences to the Colonies.

The Scheme lasts for three years, that is, until the end of

the period of five years during which the 1932 rates of duty were intended to remain in effect.

Prices. Raw sugar prices rose in the first two months of the year to 5s. 8½d. per cwt. but fell away in March and April, after which prices were steady, with some improvement in June and early July. After July, however, prices declined and finished the year at 4s. 3d. per cwt., or 4½d. under the opening price of the year. The average price was 4s. 9d. per cwt.

Sugar Prices, 1927-9 and 1930 to 1934

	Raw centrifugals 96° polarization c.i.f. London per cwt.		Wholesale prices Tate's cubes London (duty included) per cwt.	
	s.	d.	s.	d.
1927-9 . . .	11	4	30	2
1930 . . .	6	5	24	5½
1931 . . .	6	5½	23	6
1932 . . .	5	7	23	2½
1933 . . .	5	3	23	0
1934 . . .	4	9	22	2½

compared with 5s. 3d. in 1933. Wholesale prices of Tate's cubes moved in sympathy with the prices of raw sugar. The average price was 22s. 2¾d. per cwt., a fall of 9½d. from 1933.

The market is still dominated by the supply position. Visible stocks in the chief producing countries continued to fall in 1934, but they are still far above a normal level. Stocks at 1 September 1934, and at that date in previous years were:

Visible Stocks of Sugar on 1 September (thousands of tons)*

	Europe	Ex-Europe	Total
1927 . . .	1,009	2,961	3,970
1931 . . .	2,598	5,500	8,098
1932 . . .	2,314	6,341	8,655
1933 . . .	1,916	5,952	7,868
1934 . . .	1,729	5,856	7,585

* *International Institute of Agriculture, Monthly Crop and Agricultural Statistics*, November 1934.

The fall in stocks during the year to 1 September 1934 was accompanied by an appreciably higher production of both beet- and cane-sugar in the 1933-4 season compared with the previous year. It follows, therefore, that there was an increase in world consumption during 1933-4.

5. Fruits and Vegetables

Fruits

Home production. No figures of the home production of fruits in 1934 are yet available. The acreage of orchards increased by 2 per cent., and the acreage under small fruits by between $\frac{1}{2}$ and 1 per cent. The yield of apples, pears, and plums was exceptionally high.

Imports. Total imports of fruit amounted to 27,085,888 cwt., $7\frac{1}{2}$ per cent. less than in 1933 but 2 per cent. above the average sent from 1929 to 1931. About 46 per cent. of the total weight came from the Empire in 1934, compared with 28 per cent. in 1929-31. Of this total, 73 per cent. consisted of fruits such as oranges, lemons, grapes, and bananas, which compete only indirectly with the home-produced fruits. Imports of these types of fruit declined only $2\frac{1}{2}$ per cent. between 1933 and 1934, and were still $9\frac{1}{2}$ per cent. larger than on the average of 1929-31. About 38 per cent. of the total weight came from the Empire in 1934, compared with 22 per cent. in 1929-31. The great increase in orange imports in recent years was slightly reversed in 1934, while fewer lemons were also imported. These decreases more than counterbalanced increased imports of grapes, bananas, and grape-fruit.

Imports of the fruits which compete more directly with British products amounted to 7,379,613 cwt. in 1934, 19 per cent. lower than in 1933, and 14 per cent. below the average of 1929-31. The Empire's share in total imports rose from 40 per cent. in 1929-31 to 68 per cent. in 1934. All of this type of fruit, with the exception of apricots and cherries, were

imported in smaller quantities in 1934 than in 1933. Foreign supplies have all been subject to import duties since 1932, and no changes in these duties were made in 1934.

Imports of *apples*, amounting to 5,900,140 cwt., were so

*Imports of Raw Fruit into the United Kingdom
1929-31 to 1934**

	Quantities				Percentage from the Empire	
	1929-31	1932	1933	1934	1929-31	1934
	cwt.	cwt.	cwt.	cwt.		
Apples	6,500,199	8,090,780	7,450,322	5,900,140	47.6	76.6
Pears	1,114,944	1,112,321	1,133,865	1,008,981	20.7	39.1
Plums, greengages, and damsons	469,217	343,869	264,902	254,873	7.7	30.9
Apricots	102,994	109,323	41,653	75,759	0.5	3.0
Peaches, nectarines	60,681	100,499	111,470	92,655	36.1	48.4
Cherries	87,284	12,050	4,549	11,264	..	0.2
Gooseberries	20,294	10,943	10,983	7,933	2.3	..
Currants	122,371	47,032	32,723	21,859	0.1	..
Strawberries	79,263	40,825	12,376	6,140	0.3	..
Total	8,566,247	9,867,551	9,062,842	7,370,613	39.6	68.3
Total other fruits	17,086,474	18,114,253	20,187,647	19,706,275	22.2	37.5
Grand total	26,552,721	27,981,804	29,250,489	27,085,888	27.8	45.9

* *Annual Statement of Trade of the United Kingdom, 1933, Part II, and the Monthly Trade and Navigation Accounts, December 1934.*

much as 21 per cent. less, mainly as a result of the large home crop and low prices. Foreign supplies, coming mainly from the United States, were subject to a duty of 4s. 6d. per cwt. under the *Ottawa Agreements Act*. They declined 16 per cent. to an amount less than half that sent in 1929-31. Empire supplies had increased rapidly between 1929-31 and 1933, but declined 22 per cent. between 1933 and 1934. Canada and Australia, the two most important sources of supply, both sent less, but Empire countries sent 77 per cent. of the total imports, compared with 48 per cent. in 1929-31.

Imports of *pears*, at 1,008,981 cwt., were 11 per cent. lower

than in 1933 and 9½ per cent. below the average of 1929-31. Imports from foreign countries, subject to a duty of 4s. 6d. per cwt., amounted to 614,712 cwt., only 4 per cent. less than in the preceding year. The United States, the most important foreign source of supply, sent less, while Belgium, the foreign shipping country of second importance, sent slightly more. Shipments from the Empire, which had been expanding until 1933, dropped 20 per cent. to 394,269 cwt. Australia sent 39 per cent. less, which more than counterbalanced the 22 per cent. expansion in South African shipments. In spite of the relative decline in imports from the Empire, these still accounted for 39 per cent. of the total, compared with 21 per cent. in 1929-31.

Imports of *plums* depend mainly upon the size of the home crops. These were large, and there was a decline of imports of 4 per cent. in the year to 254,873 cwt., or 46 per cent. less than the average of 1929-31. Foreign imports paid a duty of 9s. 4d. per cwt. in all months except April, May, and November, when 10 per cent. *ad valorem* was charged, but the greater part arrives from June to September and competes with the home crop. They amounted to 176,103 cwt., 13 per cent. below the low level of 1933. Empire shipments come mainly from South Africa in the first three months of the year. In 1934 they were 78,770 cwt., an increase of 27 per cent. on 1933. The Empire sent 31 per cent. of total plum imports compared with 8 per cent. in 1929-31.

The importation of *apricots* was 75,789 cwt., 82 per cent. more than in 1933, but 26 per cent. less than the average of 1929-31. Empire supplies are unimportant, and as France ceased, after 1931, to send large quantities, Spanish supplies have dominated the market, amounting to 94 per cent. of total imports. There is a duty of 10 per cent. *ad valorem* on foreign supplies.

Imports of *peaches and nectarines* were 92,655 cwt., a decline of 17 per cent. on the previous year, but 53 per cent. more

than the average of 1929-31. Foreign supplies pay a duty of 14s. per cwt. from 1 December to 31 March, and 10 per cent. *ad valorem* for the rest of the year, while hothouse fruit pays 1s. per lb. from 1 April to 31 October, instead of 10 per cent. Foreign imports, arriving mainly from July to September, declined by 39 per cent. Shipments from the Empire, almost entirely from South Africa in January and February, increased by 37 per cent. between 1933 and 1934, and Empire supplies were 48 per cent. of the total compared with 36 per cent. in 1929-31.

Cherries, currants, gooseberries, and strawberries come almost entirely from European countries, and importation has declined sharply since the imposition of heavy duties in 1932. Foreign *cherries*, besides paying a duty of 3d. per lb. from 1 May to 15 August, and of 10 per cent. *ad valorem* during the rest of the year, were prohibited from a number of districts owing to the danger of infection by the Cherry Fruit Fly. Imports, chiefly from Italy, amounted to 11,264 cwt., which, although more than twice as great as imports in 1933, was still only 13 per cent. of the average in 1929-31. Imports of *currants* in 1934 amounted to 21,859 cwt., 33 per cent. less than in the previous year, and 82 per cent. below the average of 1929-31. They came largely from France, and paid duties of 2d. per lb. from 1 May to 31 August, and 10 per cent. *ad valorem* during the rest of the year. Imports of *gooseberries* declined 28 per cent. between 1933 and 1934 to 7,933 cwt., or 61 per cent. less than the average in 1929-31. They came principally from the Netherlands and paid a duty of $\frac{1}{2}$ d. per lb. in May, June, and July, and 10 per cent. *ad valorem* in other months. Imports of *strawberries* were 6,149 cwt. in 1934, a decline of about one-half, and equal to less than a twelfth of the average of 1929-31. Supplies came almost entirely from France and the Netherlands, and paid a duty of 3d. per lb. from 1 April to 31 July, and of 10 per cent. *ad valorem* during the rest of the year.

*Seasonal Wholesale Prices per cwt. of First Quality
Apples, Pears, and Plums, 1927-9 to 1934**

	Apples			Pears	Plums	
	Cox's Orange	Worcester Pearmain	Lane's Prince Albert	William	Victoria	Egg
	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>
1927-9 . . .	75 0	27 0	18 9	31 0	50 0	25 9
1930 . . .	61 6	28 0	18 3	24 6	23 6	7 2
1931 . . .	78 6	34 0	22 6	31 6	44 0	18 3
1932 . . .	72 0	34 6	19 0	..	52 6	29 0
1933 . . .	72 0	25 6	15 6	28 6	28 6	8 9
1934 . . .	45 0	20 0	11 0	21 6	25 6	8 1

* From *Agricultural Statistics* and Ministry of Agriculture.

Prices.

The Ministry of Agriculture's index number of wholesale fruit prices at large town markets stood at 129 in 1934, compared with 143 in 1933 and 170 on the average of 1927-9.¹

Prices of dessert *apples* fell little between 1927-9 and 1933, though cooking apples had declined in price. In 1934, however, the exceptionally heavy production on an expanded

*Seasonal Wholesale Prices per cwt. of First Quality Soft
Fruits, 1927-9 to 1934**

	Cherries Black	Currants		Gooseberries	Strawberries per lb.
		Black	Red		
	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>	<i>s. d.</i>	<i>d.</i>
1927-9 . . .	72 0	73 6	51 0	40 0	10½
1930 . . .	62 6	39 0	33 0	30 0	9½
1931 . . .	55 0	48 0	36 0	31 6	8½
1932 . . .	86 0	76 6	48 0	38 0	9½
1933 . . .	65 0	69 6	47 0	33 6	10½
1934 . . .	62 6	52 6	42 6	24 6	11

* From the *Agricultural Statistics* and Ministry of Agriculture.

¹ See p. 220.

acreage brought about a fall in all varieties, both dessert and cooking.

The price of *pears* followed the same general trend.

The price of *plums* fluctuates with the very variable home crop, and as output was high in 1934 and, in addition, the various varieties tended to mature at the same time, figures for the year were low.

The prices of cherries, currants, and strawberries fell proportionately less between 1927-9 and 1934 than those of apples, pears, and plums. The output was not especially high, and imports had declined substantially since the imposition of duties in 1932.

Vegetables

Home production. The acreage planted with the more important vegetable crops¹ increased to 199,700 acres, or 9 per cent. above the 1933 acreage, and 26 per cent. greater than in 1929-31.

Imports. The total value of vegetable imports, excluding potatoes, was £6,656,162, of which tomatoes accounted for 67 per cent., onions 19 per cent., and other vegetables 14 per cent.

Total *tomato* imports were 2,775,661 cwt., 4½ per cent. less than in 1933 and 5 per cent. less than the average of 1929-31. Foreign tomatoes were subject to duties of 2*d.* per lb. in June and July, of 1*d.* per lb. in August, September, and October, and of 10 per cent. *ad valorem* during the rest of the year. Imports from foreign countries were 1,660,990 cwt., 3½ per cent. below the previous year, and 22 per cent. below the average of 1929-31. Shipments from the Canary Islands, the most important foreign source, declined only slightly, but imports from the Netherlands declined substantially. Empire shipments, coming from the Channel Islands, were 1,114,671 cwt., 6 per cent. less than in the previous year, but 41 per

¹ See p. 303.

cent. above the average of 1929-31. The Empire sent 40 per cent. of the total, compared with 27 per cent. in 1929-31.

Imports of *onions* were 10,266,171 bushels, almost the same as in 1933, and only 2½ per cent. less than the average of 1929-31. Almost all were foreign, mostly from Holland, Spain, and Egypt, and were subject to the general duty of 10 per cent. *ad valorem*. Imports from Spain have been decreasing in recent years, while those from Holland have increased.

Other vegetables are not separately enumerated in the trade returns. The value imported was £927,359, 6 per cent. more than in 1933, but 44 per cent. below the average of 1929-31. Of the total value, 4 per cent. came from the Empire, compared with 3 per cent. in 1929-31. Imports of fresh vegetables from foreign countries and from the Irish Free State in most cases paid specific duties under the Import Duties Act, 1932.¹ Some of these rates were changed during the year.²

Prices.

The Ministry of Agriculture's index number of wholesale vegetable prices at large town markets was 143 in 1934,³ com-

Seasonal Wholesale Prices of First Quality Vegetables 1927-9 to 1934*

	Cabbage per doz.	Cauli- flower per doz. heads	Brussels Sprouts per cwt.	Celery per bundle	Carrots per cwt.	Onions British per cwt.	Pear Market Garden per cwt.
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
1927-9	1 10	4 0	20 0	2 7	7 0	10 7	25 0
1930	1 9	3 9	20 6	2 4	4 9	6 2	22 0
1931	1 8	3 4	18 6	2 4	5 5	7 7	21 6
1932	1 4	3 3	15 9	1 11	8 2	12 0	18 6
1933	1 7	3 7	15 6	1 10	7 11	7 8	22 0
1934	1 6	3 7	17 9	1 10	7 5	7 2	18 6

* From the *Agricultural Statistics* and Ministry of Agriculture.

¹ See the *Agricultural Register*, 1933-4, p. 26.

² See Appendix, pp. 357-9.

³ See p. 220.

pared with 141 in 1933, and 162 on the average of the years 1927-9. Most vegetable prices showed little change in 1934.

6. Wool

The output in the United Kingdom, in 1934, was 114 million lb., on an estimated greasy basis. Exports totalled 47 million lb., so that 67 million lb. were available for home utilization. In addition, 522 million lb. of imported wool were retained, and there were 15 million lb. from imported skins. Total wool supplies in the United Kingdom, therefore, were 604 million lb., compared with 607 million lb. in 1933 and 624 million lb. in 1929-31.¹

Home production. The total output, of which Northern Ireland produced about 2½ million lb., showed a reduction of about 5 per cent. from 1933.

Exports. Exports of home-grown wool, which is the only British agricultural product to be exported in large quantities, were 46,520,000 lb. in 1934, a reduction of 13,910,000 lb. from 1933 or 23 per cent., due, mainly, to lower purchases by

Exports of Home-grown Wool, 1929-31 to 1934, in million lb.

	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
Canada . . .	1.54	1.67	2.30	2.40	5.0	5.1
Other Empire . . .	0.51	0.48	0.58	0.55	1.7	1.2
Germany . . .	4.01	6.80	7.73	5.99	13.0	12.9
Belgium . . .	3.10	3.26	4.14	3.44	10.1	7.4
France . . .	1.35	5.39	9.44	7.16	4.3	15.4
Italy . . .	4.56	10.29	13.02	12.00	14.7	25.8
U.S.A. . . .	10.01	3.37	16.74	4.82	32.4	10.4
Other foreign . . .	5.80	4.27	6.48	10.16	18.8	21.8
Total Empire . . .	2.05	2.15	2.88	2.95	6.7	6.3
Total Foreign . . .	28.83	33.38	57.55	43.57	93.3	93.7
Total . . .	30.88	35.53	60.43	46.52	100.0	100.0

¹ *Wool Intelligence Notes*, vol. ii, No. 10, January 1935.

the United States. Canada took rather more than in 1933. Germany, France, and Belgium bought slightly less, though, taking account of their restrictions on imports, the British share of the trade was well maintained. Purchases by a number of small foreign buyers continued to expand.

Gross Imports of Wool, 1929-31 to 1934, in million lb.

	Quantities				Per cent. of total	
	1929-31	1932	1933	1934	1929-31	1934
Australia . . .	272.3	302.0	308.7	254.6	33.4	32.2
New Zealand . . .	185.7	201.1	243.7	216.4	22.8	27.3
South Africa . . .	152.2	211.3	174.1	106.0	18.7	13.4
India . . .	41.3	34.6	40.6	37.0	5.1	4.7
Other Empire . . .	11.7	12.2	18.0	20.1	1.4	2.5
Argentina . . .	68.6	90.4	81.1	84.3	8.4	10.7
Uruguay . . .	26.4	16.2	25.3	15.2	3.3	1.9
Chile . . .	23.7	24.8	21.0	20.7	2.9	2.6
Other foreign . . .	32.9	25.7	39.5	36.9	4.0	4.7
Total Empire . . .	663.2	761.2	785.1	634.1	81.4	80.1
Total Foreign . . .	151.6	157.1	166.9	157.3	18.6	19.9
Total . . .	814.8	918.3	952.0	791.2	100.0	100.0

Imports. Gross imports of wool were 791 million lb. compared with 952 million lb. in 1933. Of this, merino wool accounted for 334 million lb., cross-bred, 376 million lb., and other sorts, 81 million lb. Empire countries, mainly Australia, New Zealand, and South Africa, provided 80 per cent. of our import requirements; foreign countries, of which Argentina was the most important, supplied 20 per cent.

Raw wool was placed on the free list under the Import Duties Act, 1932.

Prices.

The Ministry's index of wool prices rose from 66 to 80 between 1933 and 1934, an increase of 21 per cent.¹ The

¹ See p. 220.

average price of British wool at country sales in 1934, was 9½d. per lb., a rise of 1½d., or 21 per cent. on the 1933 price.

Imported wool also showed higher prices. Merino rose from 25¼d. to 27¼d., an increase of 8 per cent. Cross-bred

*Average Annual Prices per lb. of Wool in Great Britain
1927-9 to 1934*

	Merino	Cross- bred	Southdown		Half-bred		Welsh		Black- face unwashed
			washed	unwashed	washed	unwashed	washed	unwashed	
	d.	d.	d.	d.	d.	d.	d.	d.	d.
1927-9	47½	22½	23½	17½	18½	15½	14½	12½	11½
1930	25½	11½	13½	9	10½	8½	9½	7½	6½
1931	21½	9½	9½	6½	6½	4½	5½	3½	5
1932	19½	7½	9½	6	6½	4½	4½	3	4½
1933	25½	8½	12½	9½	7½	6½	7½	5½	5½
1934	27½	9½	11½	10½	9	7½	8	6½	5½

rose from 8½d. to 9½d., due, mainly, to higher prices at the beginning of the year. From March onwards there was a fairly steady decline which lasted until the end of the year, except for finer wool.

The estimated wool production in the five chief exporting countries for the 1933-4 season was 1,961 million lb., greasy, compared with 2,157 million lb. for 1932-3, a drop of 9 per cent.¹ The decline in prices throughout the year was not expected and must be accounted for by a slackening of demand. The first setback was the German wool prohibition on 24 March; later, import licences were introduced by Italy, a strike occurred in the Belgium textile industry, and French industrial activity was also lower. All these factors tended to reduce confidence. Demand strengthened in the autumn and barter agreements by Germany with Argentina and South Africa improved the position. The Anglo-German Trade Agreement of 1 November was a

¹ *Wool Intelligence Notes*, vol. ii, No. 4, July, 1934.

further bullish factor. Improved home trade, after a decline in activity during the summer, was a further incentive to higher prices.

C. REQUISITES

I. Fertilizers

During 1934 the fertilizer market was, on the whole, featureless. The index for the year was 90, the same as in

Fertilizer Prices, 1927-9 and 1931 to 1934
(per ton)

	1927-9	1931	1932	1933	1934
Nitrate of Soda (N. 15½%)	£ s. d. 11 2 8	£ s. d. 9 0 6	£ s. d. 8 10 6	£ s. d. 8 0 0	£ s. d. 7 11 0
Sulphate of Ammonia (N. 20.6%)	10 13 10	8 4 0	6 5 0	6 13 6	7 2 6
Basic Slag (P.A. 14%)	2 4 1	2 2 9	2 3 6	2 5 3	2 7 3
Superphosphate (S.P.A. 13½%)	2 15 7	2 17 3	2 13 3	2 13 3	2 14 0
Kainit (14% Potash)	2 19 1	3 0 9	3 5 3	3 5 0	2 17 6

the previous year, although sulphate of ammonia, basic slag, and superphosphate were dearer and nitrate of soda and kainit cheaper than in 1933.

In December the Imports Duties Advisory Committee, on the recommendation of the Treasury, increased the customs duty on superphosphate from 10 per cent. *ad valorem* to an inclusive rate of 10s. per ton or to 20 per cent. of the value of the goods, whichever should be the greater.¹ The Committee stated in their report (Cmd. 4756) that although the proportion of imports to home production is not high, low grade Continental superphosphate was being delivered at prices, which, despite the 10 per cent. duty, were lower than the British cost of production. Under the new duties

¹ Additional Import Duties (No. 35) Order, 1934 (S.R. and O. 1934, No. 1295).

it is hoped that the productive capacity of superphosphate works in this country will be more fully utilized, and as a satisfactory guarantee as to prices has been given, agricultural interests are not expected to be adversely affected. The Order came into force on 10 December, 1934.

The Committee also received an application for an increase in the import duty on compound fertilizers, mixed fertilizers, and compound manures in powder or granular form imported in bags or bulk, but no decision had been given at the end of the year.

2. Feeding Stuffs

The general index number of feeding-stuff prices was 91, an increase of 6 points over 1933. Prices had fallen steadily from 1928 until the departure from the Gold Standard in September, 1931. After this there was a rise which continued for the greater part of 1932, followed by a decline until November, 1933. Throughout 1934, the general price trend of the various descriptions of feeding stuffs was upward. The drop during 1933 had for some foods been considerable, and the general index fell from 92 in January to 78 in October. By January 1934 the index had risen to 82, and until July the level of prices varied between about 15 and 18 per cent. below the pre-War level. In July and August prices rose sharply to the pre-War level, which was roughly maintained for the rest of the year. All feeding stuffs shared to a varying extent in the general upward movement.

Average prices in 1934 compared with the three previous years and with the base period 1927-9 are given in the table on page 296.

Cottonseed cakes were the only foods at a lower average price than in the previous year. Although both English and Egyptian advanced during the latter half of the year, the rise was insufficient to restore the level from which they had declined during the last five months of 1933.

The production of hay during 1934 was slightly more than in the previous year, though still below the average. Stocks on farms in England and Wales on 1 January 1935 were estimated at 3,759,000 tons, 128,000 tons more than at the same date in 1934, though appreciably below the average of

Feeding-stuff Prices, 1927-9 and 1931 to 1934
(per ton)

	1927-9			1931			1932			1933			1934		
	£	s.	d.	£	s.	d.	£	s.	d.	£	s.	d.	£	s.	d.
Barley imported	9	16	4	5	0	6	6	8	6	5	2	6	6	0	0
Oats imported	9	13	6	6	1	6	7	1	0	5	16	0	6	16	8
Maize (Argentine)	9	0	0	4	5	0	4	16	0	4	8	6	5	1	3
Milling offals															
Middlings	8	13	10	5	16	6	6	13	6	5	12	6	6	1	6
Bran (British)	7	16	6	5	9	6	6	6	6	5	10	0	5	18	6
Oilcakes															
Linseed cake (English)	12	11	2	8	10	6	8	6	6	8	10	0	9	0	6
Cottonseed cake (English)	7	17	6	5	8	0	5	11	0	5	10	6	4	16	3
Cottonseed cake (Egyptian)	7	9	2	4	15	6	5	2	0	5	1	0	4	8	6
Grains, dried ale	8	2	6	4	14	0	5	15	0	4	19	6	5	1	0
Maize meal	10	3	0	5	9	0	5	17	0	5	7	0	5	19	0
Barley meal	10	17	8	6	7	0	7	9	6	6	3	0	6	14	0

the previous five years. Relatively low stocks and the light crop of 1934 had the effect of strengthening prices, and between January and December clover hay advanced by 16s per ton, meadow hay by 23s. per ton, and mixture hay by 15s. 6d. per ton. Clover hay in 1934 averaged 87s. per ton and meadow hay 69s. per ton, an increase of 23s. and 15s. per ton respectively over the 1933 figures. This is the first substantial increase since 1929.

Straw stocks on farms in England and Wales on 1 January 1935, were estimated to be 2,538,000 tons compared with 2,422,000 tons at the corresponding date in 1934. Oat straw

remained steady at an average price of 45s. per ton during the first seven months of 1934, but improved later in the year, to finish at 52s. per ton. The annual average was 47s. per ton,

*Wholesale Prices of Hay and Straw 1927-9 and 1931
to 1934
(per ton)*

	1927-9		1931		1932		1933		1934	
	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.
Hay (trussed)										
Clover (2nd quality) .	105	0	77	6	63	0	66	0	87	0
Meadow (2nd quality) .	90	6	69	6	54	6	54	0	69	0
Straw (baled)										
Wheat (1st quality) .	62	0	60	0	50	6	44	0	41	0
Oat (1st quality) .	65	6	62	6	52	0	45	0	47	0

an increase of 2s. over the 1933 figure. Wheat straw was practically unchanged throughout the year and averaged 41s. per ton, a decrease of 3s. compared with 1933. Straw prices generally have shown a downward tendency since 1929.

VI. STATISTICS

A. CROPS AND GRASS

The chief features of the statistics of crops and grass for Great Britain in 1934 were the continuation of the decline in the area of arable land, a slight decrease in the area of permanent grass, the continued upward movement in the wheat acreage, a strong recovery in the area under barley, a further decline in oats and in turnips and swedes, a record area under sugar beet, a recovery in the area of hay, and another decline in the area of grazing.

The area of *arable land* in Great Britain has declined without interruption since 1918. This year the drop was relatively small, 38,800 acres (0.3 per cent.), practically the whole of which was in Scotland (38,500 acres). The decline of 63,700 acres (0.4 per cent.) in the *permanent grass* area was the first since 1919, and was confined to England and Wales, where the area dropped by 88,900 acres. In Scotland it increased by 25,200 acres. Scottish figures thus continue the increase which has continued, except in 1932, since 1919.

Among the arable crops, the acreage of *wheat*, under the stimulus of the Wheat Act, 1932, increased by 118,200 acres (6.8 per cent.), the rise being proportionately greater in Scotland (24.5 per cent.) than in England and Wales (6 per cent.). The total acreage under wheat was 1,857,000 acres, which is 610,300 acres above the last low point of 1,246,700 acres in 1931. In 1933 the acreage of *barley* had fallen to a remarkably low level. The 'gentlemen's agreement' with the brewers and the higher prices paid for the 1933 crop, together with the possibilities of increased business in spirits with the U.S.A. as the result of the withdrawal of prohibition, had an immediate effect on the 1934 acreage, which rose by 145,700 acres (18.0 per cent.). In England and Wales the increase was

14.5 per cent., but in Scotland, where the area has been severely reduced in recent years, it was no less than 60.9 per cent. The acreage of 1933, which was the smallest on record in Scotland, was only 38 per cent. of that of 1923.

Despite its importance as a feed crop, the acreage of *oats* in Great Britain has declined steadily since 1929. In 1934, the acreage fell by 132,200 acres (5.6 per cent.), both England and Wales and Scotland contributing to the decline.

The *total corn crops* area, which includes wheat, barley, oats, mixed corn, rye, beans, and peas, increased by 116,300 acres to 5,449,100 acres.

The chief root crops grown for sale are potatoes and sugar beet. The *potato* acreage rose appreciably from 1930 to 1933, but the high acreage of 671,400 in the latter year was not maintained, a fall of 43,800 acres (6.5 per cent.) being recorded. Both countries contributed to the decrease in approximately the same proportions. *Sugar beet* acreage rose to a record level of 403,800 acres from 365,800 acres. In Scotland the acreage increased by 5,800 acres (341.2 per cent.) and in England and Wales by 32,200 acres (8.8 per cent.).

Among the forage and fodder root crops *turnips and swedes* fell by 32,600 acres (3.6 per cent.). In England and Wales the area fell by 34,800 acres and thus continued the very severe decline which had been in evidence for a number of years. The acreage of turnips and swedes in England and Wales in 1934 is rather less than half that of 1913. In Scotland, where turnips are outstanding in fodder root crops, the acreage of 1934 increased slightly; in the previous year a small increase was also recorded. The trend has been downwards, though the fall was not so severe as in England and Wales. The *mangold* acreage continued its rise in both countries. In England and Wales, where the crop is of much greater importance than in Scotland, the increase was 8,300 acres; in Scotland it was 300 acres. *Cabbage for fodder, kohlrabi, and rape*

Acree under Crops and Grass on 4 June: in Thousand Acres

	England and Wales			Scotland			Great Britain		
	1934	1933	increase + or decrease — per cent.	1934	1933	increase + or decrease — per cent.	1934	1933	increase + or decrease — per cent.
Total acreage under crops and grass*	25,030.5	25,119.6	-0.4	4,600.4	4,613.7	-0.3	29,630.9	29,733.3	-0.3
Arable land	9,249.6	9,249.9	..	2,991.6	3,030.1	-1.3	12,241.2	12,280.0	-0.3
Permanent grass:									
For hay	4,822.7	4,603.8	+4.8	180.7	178.9	+1.0	5,003.4	4,782.7	+4.6
Not for hay	10,958.2	11,266.0	-2.7	1,428.1	1,404.7	+1.7	12,386.3	12,670.7	-2.2
Total	15,780.9	15,869.8	-0.6	1,608.8	1,583.6	+1.6	17,389.7	17,453.4	-0.4
Rough grazings	5,474.0	5,397.8	+0.5	10,409.5	10,440.7	-0.3	15,833.5	15,838.5	..
Wheat	1,759.4	1,660.4	+6.0	97.6	78.4	+24.5	1,857.0	1,738.8	+6.8
Barley	860.6	751.3	+14.5	96.2	59.8	+60.9	956.8	811.1	+18.0
Oats	1,402.0	1,494.8	-6.2	816.5	855.9	-4.6	2,218.5	2,350.7	-5.6
Mixed Corn	96.3	104.5	-7.8	2.1	1.8	+10.7	98.4	100.3	-7.4
Rye	17.9	19.8	-9.6	2.7	2.8	-3.6	20.6	22.6	-8.8
Beans	151.7	153.4	-1.1	2.6	3.0	-13.3	154.3	156.4	-1.3
Peas	143.0	136.3	+4.9	0.5	0.6	-16.7	143.5	136.9	+4.8
Potatoes	487.6	518.9	-6.0	140.0	152.5	-8.2	637.6	671.4	-6.5
Turnips and swedes	520.4	555.2	-6.3	353.9	351.7	+0.6	874.3	906.9	-3.6
Mangolds	246.4	230.1	+3.5	1.7	1.4	+21.4	248.1	239.5	+3.6
Sugar Beet	396.3	364.1	+8.8	7.5	1.7	+341.2	403.8	365.8	+10.4

STATISTICS

	England and Wales			Scotland			Great Britain		
	1934	1933	increase + or decrease - per cent.	1934	1933	increase + or decrease - per cent.	1934	1933	increase + or decrease - per cent.
Cabbage for fodder, kohlrabi,† and rape	130.9	117.6	+16.4	15.7	13.8	+13.8	152.6	131.4	+16.1
Vetches or tares	52.6	53.3	-1.3	8.4	8.5	-1.2	61.0	61.8	-1.3
Lucerne‡	34.2	34.8	-1.7	..	..	..	34.2	34.8	-1.7
Hops	15.0	16.9	+6.5	..	..	..	18.0	16.9	+6.5
Small fruit§	6.0	60.0	+11.7	9.6	8.6	+11.6	70.6	68.6	+2.9
Orchards§	254.9	249.6	+2.1	1.1	1.0	+10.0	256.0	250.6	+2.2
Clover, sainfoin, and grasses under rota- tion:									
For hay.	1,289.6	1,261.6	+2.2	393.8	391.5	+0.6	1,683.4	1,653.1	+1.8
Not for hay.	783.1	812.7	-3.6	1,022.9	1,086.0	-5.8	1,866.0	1,898.7	-4.9
Total	2,072.7	2,074.3	-0.1	1,416.7	1,477.5	-4.1	3,489.4	3,551.8	-1.8
Other crops	22.5	214.4	+3.8	5.6	4.0	+40.0	228.1	218.4	+4.4
Bare fallow	339.9	457.9	-25.8	12.8	7.3	+75.3	352.7	405.2	-24.2

• Not including rough grazings.

† In Scotland included in 'Other Crops'.

‡ In Scotland kohlrabi included under 'Other Crops'.

§ Including small fruit in orchards.

[Extracted from the official *Agricultural Statistics*]

again increased substantially by 21,200 acres (16·1 per cent.); on the other hand, the *vetches or tares* acreage declined. The whole forage and fodder roots crops area was practically stationary.

The area under *bare fallow*, which had been rising steadily since 1930, showed a substantial fall of 116,000 acres (24·2 per cent.). There was a large proportional increase, however, in Scotland, but there the area fallowed is not large. The large decline of 118,000 acres in England and Wales must be attributed mainly to the increase in the wheat, barley, and sugar beet crops.

The changes in the area of *rotation grasses* were downward, and followed a very large decline in 1933. The reduction in Great Britain was 62,400 acres (1·8 per cent.), most of it in Scotland (60,800 acres, 4·1 per cent.). The area in Great Britain has been falling since 1931 and is probably connected with the improving market for grain crops, especially wheat.

The utilization of the permanent grass and rotation grass areas shows some important changes. The area reserved for *hay* increased by 220,700 acres from permanent grass and 30,300 acres from rotation grasses, a total of 251,000 acres (an increase of 246,900 acres in England and Wales and of 4,100 acres in Scotland). In 1933 there was a considerable fall in the hay area, mainly from rotation grasses, while this year the recovery has been obtained chiefly from the permanent grass. The *grazing* area declined by 284,400 acres taken from permanent grass and 92,700 from rotation grasses, a total of 377,100 acres (a decrease of 337,400 acres in England and Wales and of 39,700 acres in Scotland). Last year there was also a fall in both countries.

From 1929 to 1932 the acreage of *hops* declined, and in 1932 it reached a very low level of 16,531 acres. Since then the crop has been recovering and 1934 saw an increase of 1,100 acres (6·5 per cent.).

In England and Wales and in Scotland the acreage under *small fruit and orchards* again increased.

'*Other crops*', which includes market gardening crops, also shows an increase in both countries. The area under the chief of these crops for the past four years in England and Wales was as follows:

Acreage of Certain Vegetable Crops: 1931-4. England and Wales

	1931	1932	1933	1934*
Cabbage for human consumption	35,702	33,863	33,101	37,000
Brussels sprouts	35,580	33,043	35,890	34,100
Cauliflower or broccoli	15,783	17,671	20,695	20,100
Carrots	9,430	12,489	12,868	16,500
Onions	1,534	1,892	1,941	2,100
Celery	7,310	7,710	7,348	7,500
Rhubarb	7,843	8,253	8,175	8,100
Peas picked green†	57,445	60,551	63,671	74,300
	170,627	175,472	183,689	199,700

* Provisional.

† This crop is included under 'peas' in the main table on pages 300 and 301, and not under 'other crops'. Includes a proportion cut green for fodder.

The movements in the individual crops may be seen from the table. The carrot acreage of 1934 and the acreages of Brussels sprouts and cauliflower or broccoli in 1933 were the highest recorded for these crops.

B. LIVE STOCK

The outstanding features of the live-stock statistics of 1934 in Great Britain were the continued decline in the number of horses used for agricultural purposes, an improvement in the numbers of young horses, an increase in the numbers of dairy cattle, a sharp fall in the number of cattle under one year, a fall in the numbers of sheep, and a record number of pigs.

Horses.

In Great Britain the total number of horses on agricultural holdings has been falling since 1921. The downward movement continued in 1934, the total being 1,033,500 against 1,052,000 in 1933, a fall of 1·7 per cent., but it only applied to horses used for agricultural purposes.

Horses used for agriculture diminished by 51,200 (6·7 per cent.), 49,300¹ (7·6 per cent.) being in England and Wales and 1,900 (1·6 per cent.) in Scotland. In 1930 a reversion of policy in horse-breeding took place and for the first time for many years the number of *stallions used for service* showed an increase. Although numbers fell again in 1931 and 1932, the loss was more than recovered in 1933 and this year another increase is recorded of 1,500 or 35·7 per cent. The increase in breeding is seen also in the number of *unbroken horses under one year*, which rose by 6·3 per cent. in England and Wales and 11·1 per cent. in Scotland.

Cattle.

The cattle population of Great Britain has been rising since 1930 and the total number in 1934 was 7,973,400. This was an increase of 59,500—considerably less than that of the previous year. *Cows and heifers in milk* were up by 39,200 (1·5 per cent.), *cows in calf but not in milk* by 7,600 (1·8 per cent.), and *heifers in calf* by 5,300 (1·1 per cent.).

Other cattle, 2 years and above, increased by 43,700 (4·9 per cent.) in England and Wales while there was a fall of 6,900 (3·5 per cent.) in Scotland, the net gain in Great Britain being 36,800 (3·3 per cent.). Of the younger classes of cattle, those between *one year and under two* increased, but those

¹ This decline may be exaggerated if a number of horses previously returned as used for agricultural purposes have been returned as 'other horses'. See Agricultural Returns of England and Wales, 1934: Preliminary Statement, 3 August 1934.

Numbers of Live Stock on 4th June: in Thousands

	England and Wales			Scotland			Great Britain		
	1934* Number thousands	1933 Number thousands	increase + or decrease - per cent.	1934* Number thousands	1933 Number thousands	increase + or decrease - per cent.	1934* Number thousands	1933 Number thousands	increase + or decrease - per cent.
Horses used for agriculture	825	808	+1.7	145	140	+3.6	970	948	+2.3
Stallions being used for service	43	41.2	+6.3	0.0	5.4	+11.1	43.8	49.6	+6.9
Unbroken horses:									
Under one year	257.7	131.1	+20.3	35.0	15.8	-5.1	172.7	146.9	+17.6
On holdings on agricultural									
Total of horses	885.5	902.5	-1.9	148.0	149.5	-0.7	1,033.5	1,052.0	-1.7
Cows and heifers in milk	2,213.9	2,179.0	+1.6	368.9	364.6	+1.2	2,582.8	2,543.6	+1.5
Cows in calf but not in milk	303.9	358.2	-1.6	55.4	53.5	+3.6	419.3	411.7	+1.8
Heifers in calf	477.3	418.0	-0.2	71.9	65.9	+9.1	469.2	483.9	+1.1
Bulls being used for service	90.8	95.5	-1.4	17.6	17.5	+0.0	114.4	113.0	+1.2
Other cattle:									
Under one year	944.6	900.9	+4.9	192.3	192.2	+3.5	1,136.9	1,100.1	+3.3
One year and under two	1,360.1	1,356.9	+0.0	324.4	318.1	+2.0	1,684.5	1,675.0	+0.6
Under one year	1,244.6	1,311.7	-4.4	282.7	274.9	+2.8	1,527.3	1,586.6	+3.1
Total of cattle	6,662.2	6,520.2	+1.6	1,313.2	1,293.7	+1.5	7,973.4	7,913.9	+0.8
Ewes kept for breeding	7,308.4	7,707.9	-5.9	3,354.4	3,385.7	-0.9	10,662.8	11,153.6	-4.4
Rams and ram lambs to be used	218.4	226.8	-3.7	96.8	95.1	+1.8	315.2	321.9	-2.1
Other sheep	1,483.4	2,197.2	-32.4	924.6	939.4	-1.6	2,408.0	3,136.6	-23.2
Other swine and above	7,515.0	7,897.9	-4.8	3,270.7	3,300.9	-3.3	10,795.6	11,288.8	-4.4
Under one year	16,327.1	18,089.8	-8.6	7,655.5	7,811.1	-2.0	24,182.6	25,900.9	-6.6
Total of sheep	450.3	405.6	+11.0	28.3	22.0	+28.6	478.6	427.6	+11.9
Sows kept for breeding	2,839.0	28.7	+7.3	2.8	2.5	+12.0	31.6	31.2	+1.7
Boars being used for service	2,839.0	2,834.8	+0.1	175.1	142.0	+22.8	3,014.1	2,777.4	+8.3
Other pigs	3,220.1	3,669.1	+8.2	206.2	167.1	+23.4	3,426.3	3,236.2	+6.0
Total of pigs									

* Provisional.

under one year fell, due to a general decline in England and Wales where the number was 57,100 less (4.4 per cent.); Scottish figures showed an increase of 7,800 (2.8 per cent.).

Sheep.

Sheep stocks in Great Britain rose between 1929 and 1932. A decline was recorded in 1933 and this was continued in 1934, when numbers fell by 1,718,300 (6.6 per cent.). The decline was proportionately greater in England and Wales (8.6 per cent.) than in Scotland (2 per cent.). All classes of sheep contributed to the fall. *Ewes kept for breeding* fell slightly less than half a million (4.4 per cent.), England and Wales showing a loss during the year of 459,500 (5.9 per cent.) and Scotland one of 31,300 (0.9 per cent.). But the most noticeable feature was the very marked fall of *sheep one year and above* in England and Wales where the number fell by 712,800 (32.4 per cent.). In Scotland the fall was the moderate one of 14,800 (1.6 per cent.). The number of *sheep under one year* fell in both countries, by 382,000 (4.8 per cent.) in England and Wales and by 111,200 (3.3 per cent.) in Scotland.

Pigs.

The last peak year for pigs in Great Britain was in 1932, when there were 3,349,883. There was a fall in 1933 to 3,236,176. In 1934 the numbers increased to 3,526,300, which total has never been exceeded in the recorded statistics. The rise during the year was proportionately greater in Scotland, where the increase was 39,100 (23.4 per cent.), than in England with an increase of 251,000 (8.2 per cent.). *Sows kept for breeding* increased by 44,700 (11.0 per cent.) in England and Wales and 6,300 (28.6 per cent.) in Scotland, a total of 51,000 (11.9 per cent.) for Great Britain. The numbers of *other pigs* also increased considerably. In Eng-

and in Wales they rose by 204,200 (7·8 per cent.) and in Scotland by 32,500 (22·8 per cent.).

Poultry.

The numbers of *poultry* decreased during the year by 169,000, 109,500 in England and Wales and 59,500 in Scotland.

Numbers of Poultry, on 4 June: in Thousands

	England and Wales			Scotland			Great Britain		
	1934*		Increase + or de- crease—	1934*		Increase + or de- crease—	1934*		Increase + or de- crease—
	No.	per cent.		No.	per cent.		No.	per cent.	
Fowls	61,310·0	61,171·3	+0·2	8,050·4	8,094·3	-0·5	69,360·4	69,265·6	+0·1
Ducks	2,452·0	2,677·4	-4·4	246·2	262·3	-6·1	2,698·2	2,919·7	-8·2
Geese	650·0	660·9	-1·6	28·7	27·4	+4·7	678·7	688·3	-1·4
Turkeys	799·0	810·9	-1·5	129·2	130·0	-0·6	928·2	940·9	-1·3
	65,211·0	65,320·5	-0·2	8,454·5	8,514·0	-0·7	73,665·5	73,834·5	-0·2

* Provisional.

The fall was mainly in *ducks, geese, and turkeys; fowls* showed an increase of 94,800, made up of an increase of 38,700 in England and Wales and a fall of 43,900 in Scotland.

In England and Wales the numbers of fowls have risen each year since 1926, but the rate of increase in 1934 was only 0·2 per cent.

C. WEATHER AND YIELD OF CROPS

The weather conditions of 1934 are expressed in the following statement from the Meteorological Office:¹

'The year 1934 was generally mild. It was also remarkable for the excess of sunshine and notable deficiency of rainfall. On 1 February, the exceptional warmth and excess of sunshine; on 1 July, the deficiency of rainfall over England and Wales

¹ Monthly weather report of the Meteorological Office. Summary for the year 1934. Vol. 51, No. 13.

during the period January to November, the occasional heavy local falls of thundery rains in the months June to September, the pronounced deficiency of sunshine in the last three months, and the phenomenal mildness and unusual wetness of December.'

England and Wales.

The arable farmer was helped throughout the year by weather conditions which, if not ideal, were never particularly unfavourable. Autumn-sown crops came through the winter well and benefited considerably from rain which was fairly general during the middle of March. Conditions for cultivation and the sowing of spring crops were excellent, and the work was finished earlier than usual. The dry weather of May, June, and early July retarded plant growth, and while autumn-sown corn withstood the drought remarkably well, spring-sown corn suffered.

The corn harvest had begun in most areas by the end of July and was finished by the end of August, except in north and north-west England and in Wales where rain was more frequent and delayed the completion of the harvest until the last week of September. The rain did no serious damage and the grain was generally harvested in good condition, with autumn-sown corn better both in yield and quality than spring-sown corn. Wheat, in particular, was an excellent crop, high in quality and well above the average in yield. Barley, while generally of fair quality, was inclined to be 'steely' in some districts, and both spring barley and spring oats were short in the straw and inclined to be thin. Nevertheless, the yield of both was slightly above the ten years' average.

The dry weather of early summer had a detrimental effect on root crops, which later rains were unable entirely to repair. Early and second early potatoes were lifted in June and July in good, healthy condition, but the yield was light. Over a

considerable part of the country the lifting of main-crop potatoes was completed by the end of October. The size of the tubers increased substantially during September, and

Yield of Principal Crops per acre: England and Wales

<i>Crop</i>	<i>1934*</i>	<i>1933</i>	<i>Average of the ten years, 1924-33</i>
	<i>cwt.</i>	<i>cwt.</i>	<i>cwt.</i>
Wheat	19.9	19.0	17.5
Barley	16.9	16.8	16.0
Oats	15.9	16.4	15.6
Mixed corn	15.0	16.3	15.5
Beans	17.2	16.9	16.7
Peas	16.3	14.4	14.6
Seeds hay	24.1	24.6	28.1
Meadow hay	17.2	18.0	20.3
Potatoes	7.1	6.7	6.3
Turnips and swedes	9.0	10.8	12.4
Mangolds	19.2	17.4	18.9
Sugar-beet	10.1	9.0	8.1

* Preliminary figures.

except in the extreme north-west the crop was secured in a sound and clean condition, and gave a yield above the decennial average. Fodder roots for the second year in succession were a comparative failure. Turnips and swedes, particularly, never looked like recovering from the drought of early summer, and many areas later in the year were troubled with fly. A good deal of resowing was done and later sown turnips made some progress during September, but generally speaking, the crop was very poor and in some districts was ploughed out as a complete failure. The mangold crop did not suffer so much from the drought, and with the help of rain in August and September, a better crop was lifted in October than seemed likely earlier in the year, the

yield being better than in 1933 and slightly above the ten years' average. Sugar-beet also did well; the crop yield was above the average, and the sugar content, though it fell off appreciably towards the end of the season, was also above normal.

Post-harvest weather was very favourable for autumn cultivation; the soil worked well and the land was clean. The mild weather was beneficial to the growth of autumn-sown corn, and by the end of the year crops were looking strong and healthy, though in many areas they were inclined to be too far forward for the time of year.

The stock farmer had on the whole a rather more favourable year than in 1933. Lambing in the lowland flocks was completed by the end of April, and the season was fairly satisfactory, if not quite up to earlier expectations. The crop of lambs from hill sheep was below normal. There was no actual shortage of winter keep but supplies were always on the low side, and in the circumstances cattle and sheep kept their condition remarkably well. Pastures, however, did not make any real growth until the middle of April and were then retarded by cold winds and lack of rain. By the middle of June, in many areas, they were bare and often badly burnt and there was no considerable improvement until the rains of September. Consequently, cattle at the best only did moderately well, and in areas where there was bare pasture, shortage of water, and trouble from fly attacks, they did badly. Sheep withstood the drought much better and were marketed in satisfactory condition, but milk yields, which were maintained until April, were below normal until the beginning of November and hand-feeding in August and September failed to restore a normal yield.

The hay harvest, except in the north, was little hindered by rain. Little damage was done and generally the crop was secured in satisfactory condition, and was of good quality, though the yield both of seeds and meadow hay was very

light. Few second cuts of hay were taken. October brought some relief to the stock farmer, as the mild weather improved the pastures. Winter keep, which with a light hay crop and a low yield of fodder roots will again be below normal, was not drawn upon to any appreciable extent. Cattle and sheep showed a gradual improvement with the continuance of mild, open weather and were kept out longer than usual. Milk yields were also about normal for the season during the last few months of the year.

Scotland.

The arable farmer had, on the whole, a successful year, though the weather, at times, was rather unfavourable to the work on hand. Autumn wheat wintered well, though the cold weather late in February checked growth. Spring cultivation and sowing was retarded in many areas by the sodden condition of the ground and at the end of April was in arrear. Despite the broken weather the sowing of barley and oats was completed by the beginning of May, but the growth of all corn crops was handicapped by lack of rain and cold winds during May, June, and early July. Late July rain helped the wheat crop considerably, but in many districts it was heavy and caused lodging in barley and oats.

Harvesting became general about the middle of August and although protracted by repeated downpours during early September, in most districts the bulk of the wheat crop was harvested by the second week of September, the barley harvest being completed about a week later. Wheat was a good healthy crop of high quality. Barley varied a good deal according to the district but generally produced a fair sample. Much of the oat crop was not harvested before the weather broke in September and was the least satisfactory of the cereals. In many areas it was badly discoloured, heating in the stacks occurred, and in the extreme west (where

part of the crop remained in the fields at the beginning of November) a proportion was completely ruined.

Root crops were again a very uncertain quantity. In the principal potato-growing areas of the east, last year's stock were found to be badly affected with disease, particularly the

Yield of Principal Crops per acre: Scotland

<i>Crop</i>	<i>1934*</i>	<i>1933</i>	<i>Average of the ten years, 1924-33</i>
	<i>cwt.</i>	<i>cwt.</i>	<i>cwt.</i>
Wheat	22·6	23·7	21·4
Barley	18·6	19·1	18·1
Oats	15·8	16·2	15·6
Beans	19·1	18·5	18·3
Hay from rotation grass	34·3	31·8	33·0
Hay from permanent grass	24·7	25·4	26·6
Hay from timothy meadows	43·6	42·8	44·4
	<i>tons</i>	<i>tons</i>	<i>tons</i>
Potatoes	7·3	7·1	6·7
Turnips and swedes	12·9	14·2	16·4
Mangolds	20·6	22·7	19·3
Sugar-beet	9·5	9·1	7·6†

* Preliminary figures.

† Average of 6 years only.

most popular variety 'Kerr's Pink'. Early potatoes were rather a light crop, but of good quality and free from disease. Main-crop varieties showed an improvement after the rain of late June and the second half of July, and although disease was prevalent in some districts, the crop, where harvested early as in the east, was generally pitted in good condition. Turnips and swedes, where lifted, were a very disappointing crop, though the mild, moist autumn weather effected a great improvement in the yield of swedes. Turnips, however, never recovered from the dry conditions at the time of sowing (during the early stages of growth, the roots were small) and disease was prevalent, and in some districts the crop was

practically a complete failure. Mangolds received no serious check during the season, and grew into a sound and fairly bulky crop. Sugar-beet was also an excellent crop. The yield was slightly better than in 1933 and considerably higher than the six years' average.

Autumn cultivation was retarded during October and early November by wet weather, but arrears were speedily overtaken during the latter half of November and by the beginning of December cultivation was generally well advanced. Autumn sowings of wheat were in most cases completed by the third week of November and the mild, open weather experienced during the remainder of the year was very favourable to the growth of the young plants.

The live-stock farmer, generally speaking, had a trying year. The lambing season was disappointing. In most counties, flocks suffered severely from the wintry conditions that prevailed throughout the country during April and May, and in addition to reduced numbers of lambs, losses among ewes and lambs were heavy, particularly in the north-east. The mild, open weather of January and February helped the farmer to conserve his limited supplies of fodder and turnips and still maintain stock in fair condition, but during the next three months young grass suffered severely from the cold weather and spring growth was very slow. Supplies of fodder were heavily drawn upon to maintain the condition of stock in some districts, dairy cows were housed longer than usual, and as late as July hand-feeding was in some cases necessary to maintain the milk supply.

The hay harvest became general during July and where secured during the first half of the month was of good quality. The wet conditions towards the end of July spoiled the crop in several districts, but the rain quickly improved the pastures which were bare in many areas early in July. From this time until the end of the year conditions were much more favourable. Frequent rains and mild conditions with a general

absence of frost kept pastures fresh and green. As a consequence, winter fodder (particularly roots), which is *none too* plentiful, was conserved. The milk yield, generally, was about the average for the time of year and stock of all kinds was thriving and in satisfactory condition.

VII. LABOUR

A. EMPLOYMENT

THE total number of agricultural workers employed in Great Britain on 4 June 1934 was 799,800—the lowest figure to be recorded since the War. It represents a decrease of 28,200 (3·4 per cent.) compared with 1933, when an increased employment of 17,600, which, however, was mainly among casual workers, was shown for the first time since 1925. The diminution in employment in 1934 occurred among all classes of labour, except women casual workers. A striking feature of the decline is the greater relative decrease in the numbers of regular and casual workers of 21 years of age and under compared with similar groups of over 21 years of age.

In England and Wales there was a decline of 27,800 (3·9 per cent.) workers. Slightly more women and girl casual workers were employed, but for all other groups there was a diminution, particularly of regular and casual male workers of under 21 years of age, and regular women and girl workers. In many groups a new low level of employment for the post-War period has been reached. There are, for example, fewer regular male and female workers being employed at present than at any time since the War, 575,600 in 1934 compared with 650,600 in 1928 and 685,300 in 1921. Except for the slump period of 1930-2, male and female casual employment is also lower than at any time since the War.

In Scotland there was a slight decrease of 400 (0·4 per cent.) in the total number of workers, but a decrease in all groups of male workers, very slight in regular males but more substantial in casual male workers, particularly in the group under 21 years of age. On the other hand, there was an increased number of regular and casual women and girl

THE AGRICULTURAL REGISTER

Agricultural Workers: 1933 and 1934

	England and Wales			Scotland			Great Britain		
	1934	1933	Increase + or decrease - per cent.	1934	1933	Increase + or decrease - per cent.	1934	1933	Increase + or decrease - per cent.
Regular male workers:	No.	No.		No.	No.		No.	No.	
21 years old and over	475,300	422,500	+1.7	58,700	59,000	-0.5	474,000	481,500	-1.6
Under 21 years old	107,100	113,000	-5.7	19,200	19,300	-0.5	126,300	132,000	-5.0
Total	522,400	535,100	-2.6	77,900	78,300	-0.5	600,300	614,400	-2.3
Casual male workers:									
21 years old and over	72,400	78,500	-7.8	6,800	7,000	-2.9	79,200	85,500	-7.4
Under 21 years old	9,200	10,900	-15.6	3,300	3,800	-13.2	12,500	14,700	-15.0
Total	81,600	89,400	-8.7	10,100	10,800	-6.5	91,700	100,200	-8.5
Total male workers:									
Regular and casual	604,000	625,500	-3.4	88,000	89,100	-1.2	692,000	714,600	-3.2
Women and girls:									
Regular workers	53,200	59,600	-10.7	18,000	17,800	+1.1	71,200	77,400	-8.0
Casual workers	30,500	30,400	+0.3	6,100	5,600	+8.9	36,600	36,000	+1.7
Total	83,700	90,000	-7.0	24,100	23,400	+3.0	107,800	113,400	-4.9
Total workers, all classes.	687,700	715,500	-3.9	112,100	112,500	-0.4	799,800	828,000	-3.4

workers; the increase in casual women and girl workers amounting to 500 (8.9 per cent.) is the first since 1927. •

The 'Occupations volumes' of the Census of 1931 were published during the year and the figures afford some interesting comparisons with those of the Census of 1921. The 'agricultural occupations' group is not confined to workers on the land, but includes farmers, crofters (in Scotland), forestry and estate employees, gardeners and other people who follow rural pursuits. The figures show that there was a decline of 54,725 males in agricultural occupations in England and Wales, and 5,019 males in Scotland, between 1921 and 1931. Among females there was a decline of 26,369 in England and Wales and 7,671 in Scotland. The total decline for Great Britain was 93,784, or 6.5 per cent. of the numbers in 1921.

The fall in the number of females in agricultural occupations in 1931 is very striking, being 32.9 per cent. in England and Wales and 35.2 per cent. in Scotland. The decline in males was much smaller but was greater in proportion in England and Wales (4.7 per cent.) than in Scotland (3 per cent.). From these figures it follows that agriculture is tending to become more an occupation for men than for women. Taking both countries together the proportion of women to men was 5.7 per cent. in 1931, against 7.9 per cent. in 1921.

The details of the changes among farm employees at the two census dates are given in the table on p. 318.

The chief feature of the figures in both countries is the fall in the numbers classed as 'in charge of horses' and 'not otherwise distinguished'. In England and Wales males in charge of horses fell by 38.6 per cent. and in Scotland by 39 per cent. In the group 'not otherwise distinguished', which

¹ *Census of England and Wales 1931. Occupation Tables*: H.M. Stationery Office, 1934. 30s. net; *Census of Scotland 1931. Vol. iii. Occupations and Industries*: H.M. Stationery Office, 1934. 25s. net.

includes the so-called non-skilled workers, there was in England and Wales a fall of 11.1 per cent. among males and of no less than 47.7 per cent. among females. Scotland

Farm Workers in the Census 1921 and 1931

	Males			Females		
	1931	1921	Increase + or de- crease --	1931	1921	Increase + or de- crease --
<i>England and Wales</i>	No.	No.	per cent.	No.	No.	per cent.
Farm Bailiffs	9,749	22,462	-26.1	98	217	..
Farm Foremen.	6,839			16		
Agricultural Labourers,						
Farm Servants	476,984	549,320	-13.2	17,769	32,265	-44.9
Shepherds	10,298	11,240	-8.4	25	42	..
Employed in tending cattle	62,342	59,382	+5.0	6,461	10,603	-39.1
Employed in charge of						
horses	69,754	113,616	-38.6	119	313	..
Not otherwise distin-						
guished	334,590	376,331	-11.1	11,164	21,349	-47.7
<i>Scotland</i>						
Farm Bailiffs	1,522	4,968	-1.4	3	10	..
Farm Foremen.	3,375			..		
Agricultural Labourers,						
Farm Servants	72,490	80,027	-9.4	8,879	13,534	-34.4
Shepherds	8,052	7,232	+11.3	7	15	..
Employed in tending cattle	13,092	10,722	+22.1	2,043	4,006	-26.5
Employed in charge of						
horses	22,464	36,816	-39.0	1	28	..
Not otherwise distin-						
guished	28,882	25,257	+14.4	5,028	9,485	-37.5

showed an increase among males, but a very severe fall of 37.5 per cent. among females, the class as a whole showing a decline. In both countries workers 'employed in tending cattle' showed an increase among males but a severe decline among females, but taking males and females together for both countries, the result shows little change in the two periods. Shepherds declined in England and Wales, but in Scotland there was an increase. Farm bailiffs and foremen also declined, especially in England.

The Census of 1931 was the first in which a reliable record of the numbers of agricultural unemployed workers has been

provided. It was taken on 26 April, a time of the year when demand for workers on the land is normally good. The figures show that the number of unemployed in the 'agricultural occupations' group was 5.5 per cent. (males) and 3.2 per cent. (females) in England and Wales, and 4 per cent. (males) and 5.6 per cent. (females) in Scotland. For all industries in England and Wales the percentages out of work were 12.7 per cent. (males) and 8.6 per cent. (females), and in Scotland 18.3 per cent. (males) and 11.2 per cent. (females).

The figures for those out of work in the 'agricultural occupations' group show very considerable variations between the different classes. The highest proportions were among the class of farm employees 'not otherwise distinguished', which is the largest group, being no less than 11.5 per cent. (males) and 9.8 per cent. (females) in England and Wales, and 11.3 per cent. (males) and 10.8 per cent. (females) in Scotland. Between 2 and 3 per cent. of the skilled classes of workers—shepherds, persons in charge of cattle and of horses—were out of work.

In England and Wales the number of workers out of employment on 1 January 1933 was greater than at the same time in the previous year, and it was noted that unemployment was extending to other areas not previously affected. It was also the first time in which it assumed serious proportions in some of the stock-raising counties.

In Scotland the percentage of married and single men who had failed to get work for the winter months was estimated by the Department of Agriculture for Scotland as follows:

	<i>per cent.</i>
<i>Eastern Counties</i>	5
Roxburgh and Selkirk	5 to 7½
North-east Banff	12 to 15
North-east Angus	15
Central Aberdeen	15 to 20
West and South-west districts	very small

Throughout the year the supply of regular labour was ample, and in the first half of the year and towards the end of the year appeared to be in excess of the demand in several districts. On 1 April reports indicated that there was still a surplus of agricultural workers at recent hirings. The grain harvest, however, improved the general situation and at 1 September there was practically no unemployment among agricultural workers. In some of the chief potato-growing districts shortage of labour for the harvesting of the crop was reported on 1 November, but elsewhere the supply was adequate. In several districts many men were unable to secure engagements at the November hirings. The only exception to the plentifulness of labour was female dairy workers, and at the end of the year a continued scarcity was reported on many south-western farms.

B. WAGES

England and Wales.

In the following table are given the *minimum rates of wages for adult male workers* as fixed by Orders of the Agricultural Wages Board made from 12 December 1933 to 21 December 1934, together with a note of the changes effected by the Orders, and, in those counties in which no order was made, the minimum rates imposed by the last Order made by the Board prior to this period.

England and Wales: Minimum Rates of Wages of Adult Male Workers

Agricultural Divisions and Wages Committee Areas	Wages		Hours		Overtime		Changes during the year
	s. d.		S.	W.	W.	S.	
<i>Northern:</i>							
Northumberland	30 6		52½	48			nil
Durham	29 0		50	50	8	9	nil
					(Sat.	9	
York: N.R.	32 6		52½	50	9	11	+ 1/-
W.R.	32 9		52½	48	10½	12½	nil
	33 9		52½	48	10½	12½	+ 1/-

LABOUR

32.

Agricultural Divisions and Wages Committee Areas	Wages	Hours		Overtime	Changes during the year
		S.	W.		
<i>North-western:</i>					
Cumberland and Westmorland	31 6	54	..	{ 8½ 8½	..
Lancaster: South	32 0	50	50	0 0	nil
North and East	35 6	60	60	0 0	nil
Chester	32 6	54	54	8½ 8½	+1/6; +½d.
Derby	33 0	54	54	.. 10	nil
Stafford	31 6	54	54	.. 10	+2/3
		54	54	0 0	+1/6
<i>North-eastern:</i>					
York: E.R.	33 6	52½	48	10 12	+1/6
Lincoln: Holland	33 0	50	..	{ 9 13½ Sat. 10½d.	+6d.
	33 0	50	48	{ 9 13½ Sat. 10½	nil
Kesteven and Lind- sey	30 0	53	48	0 11	nil
Norfolk	30 0	51	48	0 11	-2 hrs.
	30 0	50	48	0 11	-3 hrs.
	30 0	50	48	0 11	nil
	31 6	50	48	0 11	+1/6
<i>Eastern:</i>					
Cambridge and Isle of Ely	30 6	50	48	8 10	+6d.; -1 hr.
Suffolk	30 6	..	48	9 12	+1d.
	28 0	50	48	0 0	nil
	29 0	50	48	0 0	+1/-
	30 0	50	48	0 0	+1/-
Bedford and Huntingdon	30 6	50	48	0 11	-2 hrs.
Hertford	31 0	48	48	7½ 7½	..
Essex	30 0	50	48	0 10	-2 hrs.
Middlesex	{ 34 4½ 33 0	50	..	{ 10½ 10½	nil
		..	48		
<i>East Midland:</i>					
Nottingham	32 0	52½	50	0½ 11½	..
Leicester	31 0	54	54	0 11	+1/-; -2½ hrs.
Rutland	31 6	54	54	0 11	+1/-; -2½ hrs.
Warwick	30 0	52	48	8 8	..
Northampton and Soke of	30 0	50	..	0 11	-2 hrs.
Peterborough	30 0	50	48	0 11	-2 hrs.
Oxford	29 0	50	48	8½ 10½	+1/-; +½d.
	30 0	50	48	9 12	+1/-; +½d.
Buckingham	31 0	50	48	9 12	-1 hr.; +½d. W. +1d. S.
<i>West Midland:</i>					
Salop	31 0	54	54	0 10	+1/-
Hereford	30 0	54	48	9 9	+½d.
Worcester	30 0	53½	48	8 8	-½ hr.; +½d. W overtime and 1 S. overtime.
Gloucester	30 0	50	..	8½ 10½	+1/6
	30 0	50	48	9 12	+½d.
Wiltshire	30 0	50	50	8 8	nil
	31 0	50	50	8 8	+1/-

<i>Agricultural Divisions and Wages Committee Areas</i>	<i>Wages</i>	<i>Hours</i>		<i>Overtime</i>		<i>Changes during the year</i>
		<i>S.</i>	<i>W.</i>	<i>W.</i>	<i>S.</i>	
<i>South-western:</i>						
Somerset	30 6	52	50	9	9	nil
	<i>31 6</i>	52	50	9	9	+ 1/-
Dorset	30 0	53½	48	8	8	nil
	<i>31 6</i>	53½	48	8	8	+ 1/6
Devon	31 0	52	50	8½	10	+ ½d.
	<i>32 0</i>	52	50	8½	10	+ 1/-
Cornwall	31 0	51	51	9	10	+ 1/-
	<i>32 0</i>	51	51	9	10	+ 1/-
<i>South-eastern:</i>						
Berkshire	28 6	50	50	8½	8½	nil
	30 0	50	50	8½	8½	+ 1/6
	30 0	50	48	8½	8½	- 2 hrs.
Hampshire and Isle of Wight	29 6	53½	48	8	8	nil
	30 6	53½	48	8	8	+ 1/-
	30 6	..	48	8	8	nil
Surrey	30 9	50	50	9	11	nil
	<i>32 3</i>	50	50	9	11	+ 1/6
Kent	32 6	52	48	9	10	+ 1d.
Sussex	31 0	52	48	9	10½	nil
<i>North Wales:</i>						
Anglesey and Carnarvon	30 6	50	50	9	9	..
Denbigh and Flint	30 6	54	50	9	9	..
Merioneth and Montgomery	27 0	54	54	9	9	nil
<i>South Wales:</i>						
Pembroke and Cardigan	30 6	54	52	8	8	+ 6d.
Radnor and Brecon	29 6	54	50	9	9	nil
	30 0	54	50	9	9	+ 6d.
Carmarthen	31 6	54	54	8½	8½	+ 6d.
Glamorgan	33 6	52	48	9	10	+ 1/-
Monmouth	31 0	54	..	9½	11½	nil
	31 0	54	50	9½	11½	nil

This Table is compiled from the *Journal of the Ministry of Agriculture and Fisheries*.
Changes are shown in italics.

A number of changes in the standard rates of wages of adult male workers have been made during the period in question. All the changes made in wages rates were upward and they were fairly widespread, thus reflecting a general improvement in the agricultural situation. The table on page 323 shows the character of the changes during the period.

Altogether there were changes in 35 out of 49 areas. Increases in the weekly rates occurred in 27 areas and varied from 6d. to 2s. 3d. In Cornwall, Oxford, and Suffolk there were two successive rises of 1s. The only areas in which the minimum

rates of wages were less than 30s. a week at the end of 1934, were Durham (29s.) and Merioneth and Montgomery (27s.).

The reduction of hours to which the minimum rates applied varied from $\frac{1}{2}$ to 3 per week. These affected 11 areas,

*Changes in Wages Rates: 12 December 1933 to
21 December 1934*

<i>Character of Change</i>	<i>No. of areas</i>
Increase in weekly minimum wages	18
Increase in weekly minimum wages and reduction of hours	4
Increase in weekly minimum wages and increase in overtime rates	4
Increase in weekly minimum wages, reduction of hours, and increase in overtime rates	1
Reduction of hours	4
Reduction of hours and increase in overtime rates	2
Increase in overtime rates	2
No change	14
	49

the summer hours being reduced in 9, the summer and winter hours in 1, and the winter hours in 1.

There were increases in overtime rates, both week-day and Sunday, in 9 areas.

Very few changes were made in the rates for *adult women workers*. In Gloucestershire minimum wage rates were increased by $\frac{1}{4}d.$ to $5d.$ per hour, in Devon by $1d.$ to $6d.$ per hour, and in Kent by $\frac{1}{2}d.$ to $6d.$ per hour. In Kent there was also an increase of $\frac{1}{2}d.$ per hour in the weekday and $\frac{3}{4}d.$ per hour in the Sunday overtime rates, and in Worcestershire an increase of $\frac{3}{4}d.$ in weekday and Sunday overtime rates. Elsewhere rates were unchanged.

There were a number of rises of wages rates for skilled workers—stockmen, horsemen, and shepherds—but these were much less numerous than those made in respect of adult male workers.

During the year a report was issued by the Ministry of Agriculture and Fisheries summarizing the proceedings under the Agricultural Wages (Regulation) Act of 1924 for the two years ended 30 September 1933.¹ This report records 'that the reduction in the average minimum weekly rate of wage from 31s. 8d. to 30s. 7½d., equivalent to about 3 per cent., occurred during the period of seven years from June 1926 to June 1933, when agricultural prices declined by 29 per cent. and the cost of living by 18 per cent.'. The conclusion is reached that the Wages Act has sheltered the agricultural worker from the worst effects of the depression, with its accompanying unemployment, by providing an element of stability in wages which has operated in the interest not only of the worker, but of the industry as a whole. At the end of 1934 the average weekly minimum wage was about 31s. 3d.

Estimate of Average Earnings of Agricultural Workers

	Ordinary workers*		Horsemen		Stockmen	
	No. of workers	Weekly earnings	No. of workers	Weekly earnings	No. of workers	Weekly earnings
		s. d.		s. d.		s. d.
1929-30	..	33 6	..	37 5	..	39 2
1930-1	..	33 11	..	37 4	..	39 5
1931-2	3,236	33 4	1,317	37 3	1,188	38 11
1932-3	2,922	32 8	1,108	36 6	1,133	38 6

* Adult male workers of 21 years of age and over.

The same report gives an estimate, from reports of investigations made by Inspectors for the enforcement of the Act, of the wages actually paid on a number of farms throughout the country to various classes of agricultural workers, in the years 1929-30 to 1932-3. These are given in the above table.

¹ Ministry of Agriculture and Fisheries: Report of Proceedings under the Agricultural Wages (Regulation) Act, 1924, for the two years ended 30 September 1933. H.M. Stationery Office, 1934. 1s. 3d.

Scotland.

The Agricultural Wages (Regulation) Act of 1924 does not apply to Scotland, and in that country, in practically all districts, wages are fixed by private contract between farmers and employees. The estimated weekly remuneration (cash and allowances) of married orramen for the Whitsunday (28 May) and Martinmas (11 November) terms 1934, and for the Martinmas term 1933, is given in the table on page 326. The figures cannot be compared with the minimum rates applicable to adult male workers in England and Wales, as firstly, the occupations are not exactly comparable; secondly, the hours worked in Scotland are not known; thirdly, the figure for orramen represents 'estimated weekly remuneration' paid to the largest proportion of the employees of this class,¹ while for England and Wales the figures are minimum rates; and fourthly, the period of engagement in Scotland is longer than that which is usual in England and Wales.

As between Martinmas 1933 and Whitsunday 1934, weekly remuneration rose in 5 counties or county districts, viz. Banff, N.E. (10*d.*), Aberdeen, N.W. (1*s.* 2*d.*), Aberdeen, S.W. (1*s.* 7*d.*), Aberdeen, E. (1*s.* 7*d.*), and Berwick (1*s.*). There were 30 counties or county districts where the remuneration remained the same or substantially the same, and 2 counties, Inverness and Nairn, where there was in each case a fall of 1*s.* 3*d.* In 12 counties comparison was not possible. The comparison between Whitsunday and Martinmas 1934 shows that, except for a sharp reduction of 3*s.* 5*d.* in Perth, S.E., a small decrease in Aberdeen, N.W., and a small increase in Argyll (Cowal), the weekly remuneration of orramen remained unchanged.

Wages of married men of the skilled class for the three

¹ *The Scottish Journal of Agriculture*, July 1933.

*Scotland: Estimated Weekly Remuneration of Married
Orramen**

	1934		1933
	Martinmas	Whitunday	Martinmas
	s. d.	s. d.	s. d.
North and North-western Division:			
Zetland . . . . .	..	..	..
Orkney	†27 6	†27 6	†27 6
Caithness . . . . .	..	..	..
Sutherland . . . . .	..	..	..
Ross—mainland	18 6	18 6	18 6
Inverness—mainland	28 1	28 1	29 4
North-eastern Division:			
Nairn	28 1	28 1	29 4
Moray	27 9	27 9	27 10
Banff: NE.	†26 4	†26 4	†25 0
SW.	27 0	27 0	27 1
Aberdeen: NW.	27 6	27 10	26 8
SW.	†29 5	†29 5	†27 10
Central.	29 7	29 7	29 7
NE.	†26 8	†26 8	†26 8
East	†29 5	†29 5	†27 10
Kincardine	31 1	31 1	31 2
East-central Division:			
Angus: NE.	34 11	34 11	35 0
SW.	34 2	34 2	34 3
Perth: N. and E.	†25 3	†28 3	†26 3
Central	31 1	31 1	31 2
SW.	†24 0	†24 0	†24 0
SE.	32 11	36 4	36 5
Fife: NE.	31 11	31 11	32 0
SW.	25 0	25 0	25 0
Clackmannan . . . . .	..	..	..
Kinross	†30 4	†30 4	†30 5
South-eastern Division:			
East Lothian	33 5	33 5	33 5
West Lothian	31 9	31 9	31 9
Mid-Lothian	32 1	32 1	32 1
Berwick	29 0	29 0	28 0
Roxburgh	32 9	32 9	32 0
Selkirk	32 9	32 9	32 9
Peebles	32 7	32 7	32 7
Western and South-western Division:			
Argyll: N.	33 0	33 0	33 0
Cowal	†27 10	†27 1	..
Mid	30 0	30 0	..
Islay and Jura . . . . .	..	..	..
Kintyre	30 0	30 0	..
Bute and Arran . . . . .	..	..	..
Dumbarton	36 0	36 0	36 0
Stirling	39 0	39 0	39 0
Lanark: NW.	34 0	34 0	34 0
SE.	29 0	29 0	29 0
Renfrew	36 0	36 0	..
Ayr: N.	34 0	34 0	34 0
S.	32 4	32 4	32 4
Dumfries	35 1	35 1	35 1
Kirkcudbright . . . . .	..	..	..
Wigtown . . . . .	..	..	..

* Supplement to the *Monthly Agricultural Report* of the Department of Agriculture for Scotland, 1 January 1935, 1 July 1934, and 1 January 1934.

† Single men.

half-years corresponding to those in the table for orramen are as follows:

Average Weekly Earnings of Married Men

	Winter 1933-4*			Summer 1934*			Winter 1934-35†		
	Cash	Allow- ances	Total	Cash	Allow- ances	Total	Cash	Allow- ances	Total
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Ploughmen	25 7	8 5	34 0	25 10	8 3	34 1	25 10	8 3	34 1
Cattlemen	26 2	9 2	35 4	27 4	8 6	35 10	27 8	8 3	35 11
Shepherds	25 9	10 3	36 0	26 4	9 10	36 2	26 6	9 9	36 3

* *The Scottish Journal of Agriculture*, July 1934.

† Provisional. Calculated from Supplement to the *Monthly Agricultural Report of the Department of Agriculture for Scotland for 1 January 1935*.

Total earnings showed a very slight increase in the summer of 1934 over those of the previous winter. For the winter of 1934-5 the total remuneration remained unchanged.

C. UNEMPLOYMENT INSURANCE

On 28 June 1934 the *Unemployment Act, 1934* (24 & 25 Geo. V) was passed. The Act provided for the establishment of an Unemployment Insurance Statutory Committee, and, so far as agriculture is concerned, the Act directed the Committee to make such proposals as might seem to it practicable for the insurance against unemployment of persons engaged in employment in agriculture, including horticulture and forestry.

The Committee were:

Sir William H. Beveridge (Chairman).

Mr. A. L. Ayre.

Mr. A. D. Besant.

Captain the Rt. Hon. C. C. Craig.

Mr. Arthur Shaw.

Miss Katharine J. Stephenson, and

Mrs. M. D. Stocks.

Representatives of employers and employees and various individuals gave evidence before the Committee, which submitted its report to the Minister of Labour on 20 December.¹ The Committee concludes that an insurance scheme for agriculture is desirable, and recommends the extension to agriculture of the present scheme of unemployment insurance, but self-contained as to finance and with lower contributions and benefits than in the existing scheme for industrial workers. The usual rates are considered unsuitable for agriculture because (1) money wages are lower and conditions of employment different from other industries, (2) unemployment, which is estimated at 7½ per cent., is materially less than in industry as a whole, and (3) agriculture should not bear any part of the burden of the existing debt on the Unemployment Fund.

Rates of contribution and benefit suggested are as follows:

Rates of Weekly Contribution and Benefit

Ages	Rates of contribution* (from each party, employer, employee, and Exchequer)		Ages	Rates of benefit†	
	Males	Females		Males	Females
	<i>d.</i>	<i>d.</i>		<i>s.</i>	<i>d.</i>
21-64	4	3½	21-64	12 0	10 6
18-20	3½	3	18-20	9 6	8 0
16-17	2	1½	17	6 0	5 0
14-15	1½	1	16	4 0	3 6

* For men 21 years and over on yearly and half-yearly hirings the rates of contribution are to be reduced by 25 and 12½ per cent. respectively, and for other workers similarly placed suitable reductions are also recommended.

† Adult dependents 6s. 6d., and dependent children, 2s. or 3s. for first child and 2s. 6d. for each of the others. Subject to a maximum of 30s. for any one claimant.

Two conditions to deal with the special dependence of agriculture on seasons and its large use of occasional labour

¹ Cmd. 4786. H.M. Stationery Office, 1935, 1s. 3d. net.

form part of the scheme. The first is that the Seasonal Workers' Regulation under the Anomalies Act shall not be applied to agriculture in general, and the second that the period of benefit shall be governed, in the main, by a ratio rule—the one recommended being 2 weeks of benefit for the first ten unexhausted contributions and 1 week of benefit for every two unexhausted contributions beyond ten at the beginning of the benefit year.

The Committee's Scheme applies to workers in agriculture, forestry, and horticulture, and will cover approximately 703,000 males and 47,000 females, aged 14 to 64, in Great Britain. It proposes to exclude the employment, paid or unpaid, of a wife or husband, a son or son's wife, a daughter or daughter's husband, a father or mother of the employer, as such persons are not normally under a contract of service. The Committee also except from Insurance 'employment in harvesting or gathering of fruits, or flowers, peas or potatoes, or tying, training or picking of hops or in the peeling of onions' unless the person so employed is already insured against unemployment. This will have the effect of excluding persons who are not normally seeking employment (married women and children, smallholders, &c.). Private gardeners are also excluded until the Minister, by regulation, determines otherwise. Consideration is given to the cases of the piece-work contractor and the Irish migratory labourer.

The estimated income of the proposed scheme is £1,529,000; the expenditure in benefit is £1,303,000, assuming the higher rate of children's benefit and in administration £191,000, leaving a balance of £35,000 at the end of the first year. The Committee recommend that the Ministry of Labour should administer the Scheme through its organization of employment exchanges, extended as necessary to render complete and efficient service in rural districts.

VIII. MISCELLANEA

A. TITHE RENTCHARGE

The agitation against the payment of tithe rentcharge continued unabated during the most of 1934.

Towards the end of March, the Minister announced the intention of the Government to introduce amending legislation and, on 29 March, the Parliamentary Secretary to the Ministry of Agriculture introduced in the House of Lords a Bill to amend the provisions of the Tithe Act, 1891, for remissions on heavily tithed land. Under the Tithe Act of 1891, remission could be obtained on so much of the annual tithe rentcharge as exceeded $\frac{2}{3}$ of the Schedule B value of the land. The Bill altered the $\frac{2}{3}$ to $\frac{2}{5}$, $\frac{1}{5}$ in respect of each half-yearly instalment of the annual tithe rentcharge.

The Bill also simplified the procedure for obtaining the remission by making it sufficient to produce a certificate by the Surveyor of Taxes of the Schedule B annual value, whereas, under the Tithe Act of 1891, procedure was by action through the County Court. Provision was also made for tithe owners to obtain a corresponding reduction of the rateable value.

The new Bill also contained a provision by which a person in default could be sued personally in the County Court. Hitherto, the remedy against the owner-occupier was by distraint, and the practice had been the cause of much local disturbance, which brought the law into contempt.

The Bill met with considerable disapproval on both sides. Tithe owners disliked it because the new rights of recovery were not regarded as adequate compensation for a loss of £170,000 per annum, although Queen Anne's Bounty were prepared to support the Bill. Tithe payers and their representatives, while appreciating the relief which the Bill gave

to cases of hardship, did not regard this as a settlement of the dispute which had arisen over the payment of the rentcharge as stabilized by the Tithe Act, 1925.¹ The proposal to convert tithe rentcharge to a personal liability aroused the strongest opposition, and, although the Bill was given a second reading in the Lords, it was eventually withdrawn (7 June) and the Government decided to set up a Royal Commission to investigate the whole subject. Meantime tithe rentcharge would continue to be payable and recoverable in accordance with the existing law.

The terms of reference to the Commission were:

To inquire into and report upon the whole question of Tithe rentcharge in England and Wales and its incidence, with special reference to stabilized value, statutory remission, powers of recovery and method of terms of redemption.

The members of the Commission were:

Sir John Fischer Williams, C.B.E., K.C. (Chairman),
Sir Leonard James Coates,
Lord Cornwallis, C.B.E., T.D., J.P., D.L.,
Sir John Edward Lloyd, M.A., D.LITT., F.B.A.,
Sir Edward Robert Peacock, G.C.V.O., D.C.L.,

with Mr. E. L. Mitchell, C.B.E., and Mr. H. S. Allen of the Ministry of Agriculture and Fisheries as Secretary and Assistant Secretary respectively. At the end of the year the Commission had not yet completed the hearing of evidence.

Although the opposition to the payment of the rentcharge continued active, the collection of amounts due was better than in the previous year. The sixth annual report² of the Tithe Committee of the Governors of Queen Anne's Bounty, which is responsible for the collection of all Ecclesiastical

¹ N.F.U. Record, June 1934.

² Tithe Act, 1925. Sixth Report by the Tithe Committee of the Governors of Queen Anne's Bounty for the year 1933. 25 April 1934.

Tithe rentcharge in England and Wales, showed that during the period from September 1933 to March 1934 their collection had exceeded, by £80,000, the amount received during the corresponding period twelve months previously.

The Bounty continued to meet proved cases of hardship by substantial allowances from the amounts due. Since 1932 the concessions made, with the approval of the incumbents concerned, had amounted to over £48,000 in settlement of 3,800 cases. Of this, a sum of £37,426 was remitted by the Bounty during the year to 31 March 1934 to 3,142 individual payers, the total rentcharge involved being £195,849.

The number of similar cases which was being dealt with at that time was 1,365 and the amount of rentcharge involved was £80,000.

The amount of tithe rentcharge payable during 1934 under the Act of 1925 was £105 per £100 of commuted tithe rentcharge. If the basis of payment as laid down by the Tithe Act, 1836, had remained in force, the amount payable in 1934 would have been £86 10s., and by the Tithe Act, 1918, £116

Tithe Rentcharge and its Relation to Agricultural Prices and Cost of Living: 1927-34

Year	Value of Tithe Rentcharge			Tithe payment index 1927 = 100	Index of agricultural prices 1927-8 = 100	Cost of living index 1927-8 = 100
	Under Act of 1836 7 years' average	Under Act of 1918 15 years' average	Paid under Act of 1925* fixed payment			
	£ s. d.	£ s. d.	£ s. d.			
1927	133 8 10	133 12 6	105 0 0	100	99	101
1928	116 13 2	135 0 7	105 0 0	100	101	99
1929	111 3 7	137 8 11	105 0 0	100	99	98
1930	109 1 6	138 17 0	105 0 0	100	92	95
1931	105 14 10	135 19 4	105 0 0	100	87	89
1932	99 0 1	131 8 2	105 0 0	100	78††	86
1933	92 8 2†	123 16 7†	105 0 0	100	76††	84
1934	86 10 0†	116 0 0†	105 0 0	100	82††	85

* Plus £4 10s. od. per annum in respect of Ecclesiastical Tithe rentcharge as a sinking fund for redemption.

† The prices on which these values are based exclude deficiency payments under the Wheat Act, 1932.

†† Including wheat and cattle payments.

per £100 commuted tithe rentcharge, compared with £92 8s. 2d. and £123 16s. 7d. respectively in the previous year.

Taking 1927 as 100 the tithe rentcharge payment during 1934, if made in full, still remained at par, while the index of agricultural prices was 78, or including the subsidies on wheat and beef 82, and the cost of living was 85. In the previous year the corresponding agricultural index numbers were 73 and 76, and the cost of living index was 84.

Owing to the rise in the market value of Government securities the compensation for redemption of tithe rentcharge was raised, as from 6 February, to 29 times, as from 13 April to 30 times, and as from 1 November to 31 times the net amount of the tithe rentcharge after the deductions¹ prescribed by the Tithe Acts 1918 to 1925 have been made.

The following table shows the redemptions and mergers of tithe rentcharge for the 3 years to the end of 1933.²

*Tithe Rentcharge extinguished by Redemptions and Mergers:
1931-3*

	Redemptions		Mergers	
	No.	Amount of rentcharge	No.	Amount of rentcharge
		£		£
1931 . .	1,484	8,312	610	8,052
1932 . .	1,436	5,616	788	7,620
1933 . .	1,350	7,173	415	3,972

The amount of tithe rentcharge outstanding at the end of the year 1933 was £3,152,400, of which Queen Anne's Bounty held £2,094,000 in trust for Benefices and Ecclesiastical Cor-

¹ Rates and Land Tax and cost of collection.

² Ministry of Agriculture and Fisheries. *Report on the work of the Land Division of the Ministry for the year 1933*. H.M. Stationery Office 1934. 11.

porations, the Ecclesiastical Commissioners held £275,000, the Welsh Church Commissioners £205,800 and lay owners £577,600.

B. CREDIT

England and Wales

The year has been notable chiefly for the lowering of interest rates on new mortgages and improvement loans, following the drop in rates of interest generally. The Agricultural Mortgage Corporation reduced their interest rates, as from 16 April 1934, from $5\frac{1}{4}$ per cent. *gross* to 4 per cent. *gross* on improvement loans, and to $4\frac{1}{4}$ per cent. *gross* on mortgage loans. The announcement was well received in the country where the subject of interest rates had aroused a good deal of discussion among farmers. In June the Lands Improvement Company also reduced their rates for approved loans under the Improvement of Land Acts, from $3\frac{3}{8}$ per cent. *net* on loans of over £500 and from 4 per cent. *net* on loans of less than £500 to $3\frac{1}{4}$ per cent. *net*. This is the second recent reduction by the Lands Improvement Company, for lower rates had come into operation on 1 May 1933.

As to short-term credit, there is again no outstanding feature to report, although it is now generally recognized that the Agricultural Credits Act, 1928, offers no sort of solution to the problem of short-term credit.

In the almost complete absence of any information relating to short-term credit, no statement can be made of the total amount given to agriculture, or of the extent of indebtedness of the industry. The following particulars deal only with long-term credit given by certain public bodies and lending institutions mainly during 1933, the latest year for which most of the information is available.

Credit for Improvements. The numbers and amount of transactions dealt with and the type of improvements sanc-

tioned by the Ministry of Agriculture and Fisheries under the Improvement of Land Acts in 1933 and in the two previous years, were:

*Improvement Loans under the Improvement of Land Acts, England and Wales, 1931-3**

	1931	1932	1933
Applications received	380	301	307
	£	£	£
Amount applied for	175,035	124,016	172,397
<i>Total amount charged (excluding expenses)</i>			
Farm-buildings	79,794	50,449	34,665
Farm-houses and cottages	17,516	19,984	25,930
Mansion houses	11,300	1,922	1,139
Drainage	1,524	2,357	1,736
Roads	2,478	1,021	2,823
Planting . . . . .	..	2,665	4,368
Water supply	12,000	11,974	9,655
Electric light installation	10,148	5,797	10,522
Other improvements	18,387†	22,084‡	26,153§
	153,147	118,253	116,991

* Ministry of Agriculture and Fisheries. *Reports of the Land Division of the Ministry for the years 1931, 1932 and 1933*. H.M. Stationery Office.

† Including fencing and embanking £3,178, hop-drying installation £5,381, and sewage disposal £1,751.

‡ Including shops and offices £13,011, and central heating and hot-water supply £5,787.

§ Including redemption of tithe rentcharge £23,000, hop-drying plant £1,128, and fencing £1,041.

Improvements for farm-buildings and farm-houses and cottages again accounted for the bulk of the advances—51·8 per cent. in 1933 compared with 59·6 per cent. in 1932 and 63·5 per cent. in 1931.

Until the passing of the Agricultural Credits Act, 1928, the Lands Improvement Company was the recognized source of loans required for improvements sanctioned by the Ministry. Under the 1928 Act, the Agricultural Mortgage Corporation

also is empowered to make loans under the Improvement of Land Acts, but the volume of its transactions under this head has never been large, and the Lands Improvement Company remains the chief medium for improvement loans. The Company finances itself mainly by borrowing from insurance companies against secured rentcharges. Its issued share capital at 30 June 1934 stood at £37,500. The balance sheet of 30 June and 31 December 1934 showed the following figures:¹

Date	Issued capital	Due to insurance companies	Loan	Advances to landowners	Advances to landowners on work in progress	Instalment due by landowner
	£	£	£	£	£	£
30 June 1934	37,500	1,325,789	31,000	1,302,895	18,975	13,255
31 Dec. 1934	37,500	1,291,864	83,500	1,404,550	25,437	16,508

The advances made by the Agricultural Mortgage Corporation, for similar purposes up to 31 March 1934, the date of the last balance sheet, were £47,813, repayable by rentcharges of £3,776 per annum on properties of an estimated annual rental value of £31,285.

The Small-holdings Act, 1926, provides machinery for certain small-holders to obtain credit for improvements. Only four applications were made during 1933, and advances of £1,320 were approved. In 1932 two advances were approved for £639.

Mortgage Credit. The chief source of mortgage credit is the Agricultural Mortgage Corporation, which commenced business in 1929 pursuant to the Agricultural Credits Act, 1929. The amount of new loans granted by the Corporation during the year ending 31 March 1934 was £363,944, compared with £1,353,336 in the previous year. The fall was attributed mainly to the drop in outside rates of interest, as there was

¹ The Lands Improvement Company. *Reports by the Directors at Half-yearly General Meeting and Annual General Meeting, 1 August 1934 and 13 February 1935.*

no reason to believe that agricultural needs for long-term capital were substantially less. Up to that date mortgage loans amounting to £10,534,780 had been made as against £10,170,836 a year earlier. Security consisted of mortgages of 728,717 acres of agricultural land with the necessary farm-houses and buildings, valued at £16,655,514.

During the year ending 31 March 1934 92 per cent. of the total of interest and capital repayments were received punctually. This figure compares rather unfavourably with those in the two previous years, 94 per cent. and 98 per cent. respectively. If the figures are a guide, Yorkshire, Lincolnshire, Kent, Worcestershire, Somerset, and Essex appear to be the hardest hit in the depression.¹ Normal repayments during the year were £70,333. Owing to the drop in outside rates of interest the Corporation had been asked to accept and had approved special repayments of loans for £382,492. These concessions are to be discouraged in future by fixing a redemption fee commensurate to the real cost to the Corporation of the funds employed.

Balance-sheet figures for the three years to 31 March 1934 are:

Agricultural Mortgage Corporation

Date	Share capital	Government loan	Debenture stock	Loans on mortgage*
	£	£	£	£
31 March 1932 . . .	650,000	650,000	8,500,000	8,520,368
1933 . . .	650,000	650,000	10,500,000	9,485,475
1934 . . .	650,000	650,000	10,500,000	9,533,264

* Including improvement loans.

Section 13 of the Small-holdings Act, 1926, enables County Councils to make advances, up to nine-tenths of the value, to

¹ *Report of the Fifth Annual General Meeting of the Agricultural Mortgage Corporation Ltd.*, 13 April 1934.

any person who has agreed with the owner of an existing small-holding to purchase the holding. During 1933 14 advances were approved for £9,100, an average of £650 for each. In 1932 26 advances were approved for £12,639, an average of £486, and in 1931 there were 33 advances for £19,555, an average of £593.

The following table summarizes the amount of credit given in England and Wales in 1932 and 1933 through the sources enumerated above.

	1932		1933	
	£	£	£	£
<i>A. Credit for improvements:</i>				
Improvement of Land Acts	118,253		116,991	
Small-holdings Act, 1926, Section 14	639		1,320	
	<hr/>	118,892	<hr/>	118,311
<i>B. Mortgage Credit:</i>				
Agricultural Mortgage Corporation	1,353,336		363,944	
Small-holdings Act, 1926, Section 13	12,639		9,100	
	<hr/>	1,365,975	<hr/>	373,044
		<hr/>		<hr/>
		£1,484,867		£491,355

Scotland

Credit for improvements. As in England and Wales, the Department of Agriculture for Scotland supervises applications for loans under the Improvement of Land Acts, 1864 and 1899. In 1933 there were 14 absolute orders creating rentcharges for a total expenditure of £15,540. This compares with 16 orders for £20,868 in 1932, and with 11 orders for £12,473 in 1931.

The Department itself grants loans to land-holders and cottars for the improvement or rebuilding of houses or buildings, under the Small Land-holders (Scotland) Act.

1911. These loans are repayable in 50 years by annual payments of £4 for every £100 borrowed, covering interest, sinking fund, and fire insurance premium. During 1933 83 such loans for £10,443 were approved. Of the new houses

*Improvement Loans under the Small Land-holders (Scotland) Act, 1911, 1931-3**

Year	No. of loans	Amount of loans	Purpose for which loans were made				Installation of water supply
			Erection of new houses	Improvement of houses	Erection of new steadings	Improvement of steadings	
		£					
1931	260	30,368	113	129	10	9	1
1932	193	21,107	79	98	9	6	1
1933	83	10,443	42	40	1	..	..

* Reports of the Department of Agriculture for Scotland for the years 1931, 1932, and 1933.

erected, some were of a standard qualifying for the payment of subsidy under the Housing Act, 1923, and an assignment of the subsidy is accepted by the Department in part repayment of the loan. Some of the existing dwelling-houses, improved, qualified for grants under the Housing (Rural Workers) Act, 1926. Most of the applications for loans came from Lewis, Skye, South Uist, and Sutherland.

The Department also makes a number of loans under the Congested Districts (Scotland) Act, 1897. In 1933 the amount was £1,480, for erecting new houses or improving existing ones.

Mortgage Credit. The Agricultural Credits (Scotland) Act, 1929, provides facilities for mortgage and improvement loans similar to those for England and Wales under the Agricultural Credits Act, 1928.

The Scottish Agricultural Securities Corporation, Ltd., was formed, early in 1933, to operate the Act, with a share capital

of £100,000 held equally by the Royal Bank of Scotland, the British Linen Bank, the Commercial Bank of Scotland, Ltd., and the National Bank of Scotland, Ltd. The Department of Agriculture for Scotland advanced an equal sum, free of interest for sixty years. For 10 years, also, it will pay £1,750 annually towards the administrative expenses of the Corporation. The Corporation commenced business at the beginning of October 1933, and in December issued £500,000 of 3½ per cent. debenture stock at 95.

Loans are repayable by half-yearly instalments of principal and interest on the following scale:

	£	s.	d.	£
60 years	2	10	0	per 100
50 "	2	12	6	" "
40 "	2	16	8	" "
30 "	3	4	2	" "
20 "	4	0	0	" "
10 "	6	9	5	" "

Up to 31 March 1934 long-term loans for £78,275 had been made, secured on 10,414 acres of land, with farm-houses and buildings valued at £122,267.¹

Other Credit.

Provision is made under the Land Settlement (Scotland) Act, 1919 (Sections 16 and 29), for loans by the Department to assist small-holders on land settlement schemes to take over sheep stocks. Loans may be either to individual holders or groups of holders, or to sheep-stock clubs or co-operative credit societies. They are repayable by equal annual instalments of principal over a maximum period of 10 years, with interest at 5 per cent. per annum on outstanding balances. During the currency of the loans the Department exercise supervision over the credit societies and clubs, one of its local officers being co-opted on each management committee.

¹ The Scottish Agricultural Securities Corporation, Ltd. *Report of the Directors to the First Annual General Meeting, 4 May 1934.*

This scheme has been fairly successful. With few exceptions repayments of instalments of loans were made until 1927 as they fell due, but the subsequent fall in sheep-stock values and the price of wool, culminating in the rapid decline in 1932, made collection more difficult. During 1933 the Department had to grant a two-year moratorium of capital and interest, as from Martinmas 1932, to borrowers. Interest again became due at Martinmas 1934, and at Martinmas 1935 the Department will resume collection of the annual instalments of capital and interest.

By 31 December 1933 £120,037 had been advanced, £98,567 to co-operative credit societies registered under the Industrial and Provident Societies Acts, £11,425 to groups of holders not forming registered societies, and £10,045 to individual holders. Of the total, loans for £16,421 had been repaid by the end of 1933, while other repayments of capital amounted to £55,464.

The following table summarizes the credit given in 1932 and 1933 through the various sources enumerated:

	1932	1933
	£	£
<i>A. Credit for Improvements:</i>		
Improvement of Land Acts	20,868	15,540
Small Land-holders (Scotland)		
Act, 1911	21,197	10,443
Congested Districts (Scotland)		
Act, 1897	8,160	1,480
	50,225	27,463
<i>B. Mortgage Credit:</i>		
Scottish Agricultural Securities Corporation . . . . .	..	78,275
<i>C. Other Credit:</i>		
Land Settlement (Scotland)		
Act, 1919, Sections 16 and 29	*	*

* Not specified.

C. LAND SETTLEMENT

In 1934 there was evidence of a revival of interest in land settlement, particularly in connexion with the alleviation of unemployment. Influential private bodies, such as the *Society of Friends* and the *Carnegie Trustees*, devoted time and money to the subject.

The Government decided to supplement the existing statutory methods of land settlement by the County Councils, by granting money to approved private societies for the creation of small-holdings. On 17 March Mr. Elliot announced that the possibility of constituting a Land Settlement Association was being actively considered, the immediate object of which would be to provide, by way of experiment, a number of small-holdings for intensive cultivation by suitable unemployed persons. The Government, he said, would be prepared to contribute up to £50,000 over a period of three years, on a basis of £1 for every £2 raised by the Association by way of a gift in money, or its equivalent, from non-state sources. On 30 July it was announced that an association to carry out an experimental scheme for the unemployed with assistance from the Government had been formed, with Sir Percy Jackson as Chairman.

The Potton Manor Estate of 540 acres, in East Bedfordshire, was presented to the Association by Mr. Malcolm Stewart and formally opened by the Duke of Kent in October. A resident director was appointed to *superintend* the settlement and training of unemployed men to be brought down from Durham, and in January 1935 the first contingent of 20 men arrived.

A similar scheme associating agriculture and the unemployed was outlined in the reports on the Depressed Areas, particularly in that for West Cumberland. The Depressed Areas (Development and Improvement) Act, passed by Par-

liament in December, provided a sum of £2,000,000, a large proportion of which will be applied towards the creation of allotments and small-holdings.

Early in January 1935 Mr. Malcolm Stewart, the Commissioner for the Depressed Areas, issued a circular to local authorities asking for the creation of more allotments until the demand was satisfied. The additional number suggested was 10,000 at least, and he was prepared to make grants, out of the Special Areas Fund, towards purchasing land costing more than £160 an acre, up to which value loans are already obtainable from the Public Works Loan Commission. The price of the land must first be approved by the District Valuer, and the quality certified by the District Commissioner of the Ministry of Agriculture.

The Commissioner proposes also to create small-holdings. Group holdings of $\frac{1}{4}$ to $\frac{1}{2}$ acre, for intensified poultry and vegetables, are to be organized with the aid of the Society of Friends, which, with the aid of the Government grant, will provide seeds, fertilizers, &c., at cheap rates. It is hoped also to take men permanently out of the field of industrial employment, by stimulating the creation of holdings of 5 acres and upwards by County Councils and Boroughs in these areas. Working capital will be provided in the form of loans and otherwise to unemployed men drawn from special areas, while the Unemployment Assistance Board have agreed to pay allowances during the period of supervised training. The County Councils, which, under Section 2 of the Small-holdings Act, 1926, have to bear one-quarter of the estimated losses of the schemes (the Ministry of Agriculture paying the rest), are promised supplementary grants in certain cases to reduce this loss.

Thus, although there has been no great extension of land settlement in 1934, the plans have been completed for action on a considerable scale in the near future.

D. RURAL WATER SUPPLIES

In fulfilment of the promise made by the Government in 1933, when severe shortage of water occurred in many rural areas throughout the country, the Rural Water Supplies Act, 1934, was passed, empowering the Minister of Health to contribute up to £1,000,000, and the Department of Health for Scotland up to £137,500, towards the expenses of providing or improving rural water supplies.¹

At the beginning of August the Minister of Health stated that permanent schemes were in preparation in 180 rural areas. Applications for grants had been received from 154 rural district councils, covering 846 parishes, for schemes estimated to cost £2,299,000. Grants were already promised to 68 rural district councils, affecting 438 parishes, for schemes estimated to cost £1,249,000.

At that date the Minister had also received replies from 510 rural district councils on the situation of water supplies in their districts. No serious shortage of water, present or prospective, was reported in 260 of them; there was serious shortage in 179; and shortage was probable in the remaining 71 districts, if rain did not fall by the end of September.

In December the Minister of Health announced that a comprehensive inland water survey would be undertaken for Great Britain, and a Committee appointed to advise on the survey and on the progress of measures undertaken.

E. LICENSING OF BULLS

The Improvement of Live Stock (Licensing of Bulls) Act, 1931 (21 & 22 Geo. 5, ch. 43), which applies to England and Wales and Scotland, has as its object the improvement of British commercial cattle stock by the elimination of inferior bulls. In Northern Ireland and the Irish Free State, where legislation of a broadly similar nature has been in force for

¹ See p. 20.

some time, a steady improvement in the quality of store cattle has resulted.

The Act provides that no bull attaining a prescribed age on or after the appointed day shall be kept without a licence or permit, and it prohibits the use of unlicensed bulls. The prescribed age may differ as between England and Wales and Scotland, and for different breeds. Every bull for which an application for a licence is made will be inspected by an officer of the Minister, and licences will not be granted for bulls that appear to be:

- (a) of defective or inferior conformation and likely to beget defective or inferior progeny; or
- (b) permanently affected with any contagious or infectious disease; or
- (c) permanently affected with any other disease rendering the bull unsuitable for breeding purposes.

A licence may be revoked if the conditions of the licence are not complied with, or it may be suspended for a specified period if the animal is temporarily affected by a disease or defect rendering it unsuitable for breeding purposes. Once a licence is granted it remains in force during the lifetime of the animal, unless suspended or revoked, or unless the animal has been outside Great Britain for a consecutive period of fourteen days or such longer consecutive period as may be allowed. Provision is made for the transfer of licences when bulls are sold.

The Act makes further provision for the slaughter or castration of any bull for which a licence is refused, unless a permit is granted to keep the bull for a limited period for fattening. The owner can appeal, however, within fourteen days against the decision to refuse or to suspend an existing licence.

Finally, the Act empowers the Minister to make regulations prescribing various matters referred to in the Act.

England and Wales. By an Order dated 30 November

1933¹ 1 August 1934 was the date upon which the Act should come into operation.

On 30 January 1934 the Minister appointed a Committee to advise him on matters connected with the administration of the Act:

<i>Member:</i>	<i>Representing:</i>
Sir Merrick R. Burrell, C.B.E. (Chairman)	
Mr. B. J. Gates	} National Farmers' Union.
Mr. J. H. Wain	
Mr. T. Williams	} National Cattle Breeders' Association.
Mr. F. H. Sanderson	
Rev. C. H. Brocklebank	
Mr. J. H. Brigg	

Further regulations were made by an Order dated 12 March 1934² which set the prescribed age as ten months, and no bull of that age on or after 1 August 1934 may be kept without a licence or permit.

It is estimated that the number of bulls to be examined annually will be 60,000. For administrative purposes England and Wales has been divided into six areas with headquarters at York, Preston, London, Reading, Bristol, and Aberystwyth. A superintendent live-stock officer is in charge of each, while the areas themselves are divided into fifty districts, each supervised by a district inspector.

Scotland. The date upon which the Act came into operation was 1 August 1932. By an Order dated 16 April 1932³ further regulations were made by the Department with the assistance of an Advisory Committee composed of representatives of Agricultural Associations and Breed Societies:

<i>Member:</i>	<i>Representing:</i>
Captain John MacGillivray	Highland and Agricultural Society of Scotland.
Major R. W. Sharpe	Scottish Chamber of Agriculture.
Mr. J. P. Ross Taylor	National Farmer's Union of Scotland.

¹ S.R. and O., 1933, No. 1124.

² S.R. and O., 1934, No. 239.

³ S.R. and O., 1932, No. 258.

<i>Member:</i>	<i>Representing:</i>
Mr. James R. Barclay	Aberdeen Angus Cattle Society. ¹
Lord Rowallan	Ayrshire Cattle Herd Book Society.
Mr. Wm. C. Hunter	Joint Committee of Scottish Short-horn Breeders.
Mr. R. Campbell	Galloway Cattle Society.
Mr. James McLaren	Highland Cattle Society of Scotland.

The Order defined the method of arriving at the prescribed age.

There is every indication that the Act has been working smoothly. Particulars of the results of applications during the period 1 August 1932 to 31 December 1932, and during 1933, are:¹

	1932	1933
Applications for licences received	3,813	6,878
Applications for permits received . . . . .	..	23
Licences issued	610	6,780
Licences refused	21	241
Permits issued . . . . .	..	21
Appeals received	1	11
Appeals refused	1	6
Appeals sustained . . . . .	..	5
Licences transferred . . . . .	..	1,074

Applications rejected during 1933 were 3·2 per cent., always for defective or inferior conformation. Eight owners were convicted of keeping bulls for which no licence or permit was in force, and a fine was imposed on each.

F. FOOT-AND-MOUTH DISEASE

There were 76 outbreaks of foot-and-mouth disease in 1934,² compared with 87 in 1933.³ Of the 76 outbreaks, 72 were in England and 4 in Wales. None were reported in Scotland in either year. In 1934 the disease was confirmed in 14 counties (12 in England and 2 in Wales), and many

¹ Reports of the Department of Agriculture for Scotland for the years ending 31 December 1932 and 31 December 1933.

² *Agricultural Market Reports*. Issued weekly by the Ministry of Agriculture and Fisheries.

³ *Journal of the Ministry of Agriculture*, September 1934.

more counties were affected by the Ministry's Orders prohibiting the movement of stock, except by licence, within approximately 15 miles of the infected premises. Parts of Lindsey, Lincolnshire, was worst affected with 31 outbreaks (28 in the Atterby area, 2 in the Spilsby and 1 in the Louth areas). In Gloucestershire 10 outbreaks occurred (7 in the Thornbury area, and 3 near Stroud). Oxfordshire had 9 outbreaks and Yorkshire 8, of which 7 were in the West Riding and 1 in the North Riding. There were 4 outbreaks in Devon (3 near Chudleigh and 1 at Kingsteignton); 3 in Hampshire (2 at Micheldever and 1 at Andover); 2 each in Buckinghamshire, Flint, and Glamorgan, and 1 each in Derbyshire, Lancashire, Middlesex, Surrey, and Wiltshire.

No outbreaks occurred during January, February, April, May, June, and July. In the other months 1 occurred in March, 2 in August, 3 in September, 24 in October, 28 in November, and 18 in December. This distribution is strikingly different from that in 1933, when, of 87 outbreaks, 54 occurred during the first quarter of the year and 22 in October.

There was no alteration of the established policy of the Ministry in dealing with this disease, which is immediate compulsory slaughter of all affected animals and those directly exposed to infection.

G. COLORADO BEETLE¹

The Ministry announced on 28 June that there had been a discussion with the French Ministry of Agriculture about certain sanitary regulations then in force affecting the exchange of agricultural and horticultural produce between the two countries, which prohibited:

- (a) the importation of any potatoes grown in France;
- (b) the importation between 15 March and 14 October of any raw vegetables grown within 200 kilometres (125 miles approximately) of an outbreak of Colorado Beetle;

¹ *Journal of the Ministry of Agriculture*, August 1934.

- (c) the importation during the whole year of any plants, &c., grown within the same distance of an outbreak.

The regulations made by the French Government prohibited entirely the importation of British plants and potatoes into France and Algeria.

The Minister decided:

- (a) that he is justified in allowing the importation of raw vegetables (other than potatoes), plants, &c., grown more than 50 kilometres from any 'zone de protection' established by the French Government against the Colorado Beetle; and
- (b) that the period during which raw vegetables are admitted without a certificate can be extended generally to 7 April, and to 20 April in the case of vegetables grown in certain departments in the northern part of France.

An Order giving effect to these decisions came into force on 1 July.¹

The French Government decided, as from the same date, to make no change in the facilities for the importation of British seed potatoes into France and Algeria.

H. THE ROAD AND RAIL TRAFFIC ACT, 1933

This Act controls the use of mechanically propelled goods vehicles upon the public highway. All such² must be licensed (unless exempt) as follows:

After 30 September 1934:

Vehicles used by public carriers require 'A' licences, 30s. for 2 years. The Public Carrier's licence.

Vehicles used for carrying goods in connexion with the

¹ See page 367.

² 'Goods vehicle' is a motor vehicle, or trailer, for carrying goods, excluding trailers if drawn by private cars constructed to carry not more than seven passengers in addition to the driver, except when carrying goods for hire or reward. Locomotives and tractors, being used for haulage, must be licensed.

owner's business, or for hire or reward, require 'B' licences, 20s. per annum. The Limited Carrier's licence.

After 30 June 1934:

Vehicles used for carrying goods in connexion with the owner's own trade or business require 'C' licences, 7s. 6d. for 3 years. [Note: A farmer with a 'C' licence may, in certain circumstances, carry the produce of a neighbouring farmer and charge for doing so (see below).]

Agricultural vehicles exempted are those which pay reduced Road Fund licence duties, viz.:

- (a) Locomotive ploughing engines, tractors, agricultural tractors, and other agricultural engines, which are not used on roads for hauling any objects except their own necessary gear, threshing appliances, farming implements, or supplies of water or fuel required for the purposes of the vehicle or for agricultural purposes. (For these vehicles the Road Fund licence duty is 5s. a year.)
- (b) Tractors, agricultural tractors, and agricultural engines (except those paying the 5s. duty as detailed above) which are registered in the name of a person engaged in agriculture, and are not used on roads for hauling anything except the produce of, or articles required for, the agricultural land occupied by him. (For these vehicles the Road Fund licence duty is £12 for those not exceeding 5 tons unladen, £20 between 5 and 10 tons, and £2 for each additional ton.)
- (c) Goods vehicles registered in the name of a person engaged in agriculture and used on roads solely by him for conveying the produce of, or articles required for, the agricultural land which he occupies.¹ (For these vehicles the rates of duty are lower than those for

¹ These vehicles may be used to carry the produce of another farmer but if so, only occasionally; only a small proportion of the goods carried may belong to the other farmer; and no payment or reward can be accepted for carrying his goods.

MISCELLANEA

ordinary goods vehicles, except for those not exceeding 12 cwt. unladen, e.g. for a vehicle between $1\frac{1}{2}$ and 2 tons the duty is £13 instead of £25.)

- (d) Trailers drawn by vehicles in classes (a), (b), or above, and used only for the purposes specified.

Agricultural vehicles which require C licences:

Vehicles not coming within (a), (b), (c), or (d) above which pay the full Road Fund duty, but which are used by a farmer only for his own business, or for carrying the goods of a neighbouring farmer, either with or without payment.

Agricultural vehicles which require B licences:

All vehicles used in such a way that they do not fall within any of the above classes, e.g. a vehicle used not only for agricultural purposes, but for the general haulage of goods such as bricks, &c.

'Hiring allowances' may also be issued to an applicant for a licence who desires authority to take or hire additional vehicles, or to let vehicles on hire.

Short-term licences may be issued to enable vehicles to be used temporarily for seasonal business.

Every holder of a licence and every driver of an authorised vehicle must (after 30 September 1934) keep current records containing, in prescribed form, particulars of the hours of employment of the driver, the load carried, and the journey made. But farmers are relieved from the necessity of keeping these records, except when a vehicle goes more than 25 miles from the place where it is usually kept. In such cases records must be kept, in prescribed form, from the start of the journey. The record of hours must extend up to the end of the 24-hours period in which, and the record of journey and goods carried, until the actual time at which, the vehicle returns to the place where it is usually kept.

¹ These vehicles may be used frequently for carrying any amount of goods of another farmer and payment may be accepted for it.

APPENDIX

STATUTORY RULES AND ORDERS

Only Orders of general agricultural interest are included

GREAT BRITAIN

Milk Act, 1934

No.	Title and subject	Date of operation
1072	The Milk (Evidence) Regulations, 1934 (22 Sept.): <i>Regulations setting out the forms of certificates to be rendered by milk marketing boards to the Minister as evidence regarding milk used for manufacture, and giving the Minister access to books and records of boards as further evidence.</i>	1934 22 Sept.

Cattle Industry (Emergency Provisions) Act, 1934

853	The Cattle Industry (Marking of Imported Cattle) Order, 1934 (2 Aug.): <i>Provides for marking, before they leave the port of entry, all cattle over 6 months old, with certain exceptions, imported up to 31 Mar. 1935.</i>	1934 6 Aug.
928	The Cattle Industry (Emergency Provisions) Regulations, 1934 (15 Aug.): <i>Provides standards for cattle or carcasses under the Act. (See No. 1463, below.)</i>	 15 Aug.
929	The Cattle Industry (Emergency Provisions) (Rates of Payment) Order, 1934 (21 Aug.): <i>Prescribes payments from the Cattle fund for live animals and for carcasses. Prescribes also 5½ cwt. as the minimum weight for cattle to be certified under the Act.</i>	 21 Aug.

STATUTORY RULES AND ORDERS

353

<i>No.</i>	<i>Title and subject</i>	<i>Date of operation</i>
1463	The Cattle Industry (Emergency Provisions) (Amendment) Regulations, 1934 (20 Dec.): <i>Amends No. 928, above.</i>	1934 1 Jan. (1935)
British Sugar (Subsidy) Act, 1934		
1422	The British Sugar (Subsidy) Rules, 1934 (18 Dec.): <i>Prescribes the method for determining the average market price of raw sugar (for payment of subsidy on molasses made from home-grown beet between 30 Sept. 1934 and 1 Sept. 1935).</i>	18 Dec.
Finance Act, 1934		
732	The Customs (Land Boundary) Regulations, 1934 (13 July): <i>Prescribes an area within which measures may be taken for preventing smuggling in Northern Ireland (see para. (c) under the Act, p. 18).</i>	6 Aug.
Road Traffic Act, 1934		
958	The Road Traffic Act, 1934 (Date of Commencement) Order (No. 1), 1934 (14 Aug.): <i>Appoints 18 Aug. 1934, as the day on which various provisions of the Act come into force.</i>	14 Aug.
994	The Road Traffic Act, 1934 (Date of Commencement) Order (No. 2), 1934 (11 Sept.): <i>Appoints 1 Oct. 1934 as the day on which other provisions of the Act, including the revised schedule of speed limits for goods vehicles, &c., come into force.</i>	11 Sept.
Agricultural Marketing Acts, 1931 and 1933		
19	The Market Supply Committee Regulations, 1934 (8 Jan.): <i>Regulations for the procedure, &c., of the Market Supply Committee.</i>	8 Jan.

No.	Title and subject	Date of operation
79	The Agricultural Marketing (Reorganization Commission) (England) Amending Regulations, 1934 (16 Jan.): <i>Minor amendments of the regulations for Agricultural Marketing Reorganization Commissions (England).</i>	1934 16 Jan.
80	The Agricultural Marketing (Reorganization Commission) (Great Britain) Amending Regulations, 1934 (3 Feb.): <i>Similar for Reorganization Commissions (Great Britain).</i>	3 Feb.
309 (S.21)	The Aberdeen and District Milk Marketing Scheme (Approval) Order, 1934 (28 Mar.): <i>The Scheme approved, to come into force on 29 Mar. 1934 (with copy of the Scheme).</i>	28 Mar.
344	The Bacon (Import Regulation) Order, 1934 (6 Apr.): <i>(a) Prohibits importation of any bacon produced in a foreign country from pigs bred in any other foreign country.</i> <i>(b) Prohibits importation, except under licence, of any bacon from Argentina, Denmark (including Faroes), Estonia, Finland, Latvia, Lithuania, Netherlands, Poland and Danzig, Sweden, U.S.A., U.S.S.R., or from any other foreign country whose bacon imports to U.K. exceed 400 cwt. per week. Licences to be granted or revoked by the Board of Trade. (Revokes No. 1050, 7 Nov. 1933, which is similar to this Order, except for (a) above.)</i>	16 Apr
662	The Agricultural Marketing (Reorganization Commission) (England and Northern Ireland) Regulations, 1934 (8 June): <i>Regulations for the procedure, &c., of Agricultural Marketing Reorganization Commissions (England and Northern Ireland).</i>	8 Jun

No.	Title and subject	Date of operation
663	<p>The Agricultural Marketing (Reorganization Commission) (United Kingdom) Regulations, 1934 (8 June):</p> <p><i>Similar for Reorganization Commissions (United Kingdom).</i></p>	<p>1934</p> <p>8 June</p>
645 (S.37)	<p>The Scottish Milk Marketing Board (Co-opted Members) Order, 1934 (15 June):</p> <p><i>Amends the Scottish Milk Marketing Scheme, 1933 (S.R. and O., No. 479, 25 May 1933) to provide for the co-optation to the Board of two persons, after consultation with the Market Supply Committee.</i></p>	<p>15 June</p>
679	<p>The Bacon Marketing Scheme (Amendment) Order, 1934 (20 June):</p> <p><i>Amends the Bacon Marketing Scheme, 1933 (S.R. and O., No. 683, 5 July 1933) so as (i) to define the powers, &c., of the Board with regard to loans or grants; (ii) to impose an additional contribution on producers in certain circumstances; (iii) to alter the assessment of liability on a winding up.</i></p>	<p>21 June</p>
685	<p>The Agricultural Marketing (Guarantee No. 1) Order, 1934 (25 June):</p> <p><i>Empowers the Pigs Marketing Board to guarantee payments due by the Bacon Marketing Board on account of any loan made to them by the Minister of Agriculture and Fisheries or the Secretary of State for Scotland before 21 Dec. 1934. Consequential alterations made in the Pigs Marketing Scheme (S.R. and O., No. 686, 5 July 1933).</i></p>	<p>25 June</p>
703 (S.42)	<p>The North of Scotland Milk Marketing Scheme (Approval) Order, 1934 (6 July):</p> <p><i>The Scheme approved, to come into force on 7 July 1934 (with copy of the Scheme).</i></p>	<p>6 July</p>

No.	Title and subject	Date of operation
734	<p>The Bacon Marketing Board (Co-opted Members) Order, 1934 (29 June):</p> <p><i>Amends the Bacon Marketing Scheme, 1933 (S.R. and O., No. 683, 5 July 1933) to provide (i) for the co-optation to the Board of two persons, after consultation with the Market Supply Committee (and, for the year 31 Mar. 1934 to 30 Mar. 1935, subject to the approval of the Minister of Agriculture and Fisheries and the Secretary of State for Scotland), (ii) certain provisions relating to the co-opted members.</i></p>	1934
841	<p>The Hops Marketing Scheme (Amendment) Order, 1934 (13 July):</p> <p><i>Amendment of the Hops Marketing Scheme, 1932, approved, to come into force on 14 July 1934 (with copy of the amendment). The main feature is the provision of individual selling quotas for registered producers, for five years ending 31 July 1939 (see p. 156).</i></p>	29 June
1160	<p>The Potato (Import Regulations) Order, 1934 (29 Oct.):</p> <p><i>Prohibits the importation of potatoes from all foreign countries and from the Irish Free State, except under licence (issued by the Board of Trade).</i></p>	13 July
1437 (S.74)	<p>The Scottish Milk Marketing Scheme (Amendment) Order, 1934 (28 Dec.):</p> <p><i>Amends the Scottish Milk Marketing Scheme as regards (a) the definition of 'Standard Haulage Rate', (b) bonus scheme for reducing the expansion of production, (c) contributions to the Board by producer-retailers.</i></p>	8 Nov
1438 (S.75)	<p>The Scottish Milk Marketing Scheme (Directions) Order, 1934 (28 Dec.):</p> <p><i>Specifies the Standard Price and specifies certain Haulage Centres.</i></p>	1 Jan (1931)

Import Duties Act, 1932 (and other relevant Acts)

No.	Imports	Total duty	Date of operation
	<i>Alteration of duties:</i>		1934
5	The Additional Import Duties (No. 1) Order, 1934 (11 Jan.):		
	Oats in grain	3s. per cwt.	13 Jan.
	Oatmeal, including all sorts of oatmeal, oat groats, rolled oats, flaked oats, oat flour, and feeding oatmeal or ground oats; but not oat husks, oat dust or oat husk meal	7s. 6d. per cwt.	
241	The Additional Import Duties (No. 7) Order, 1934 (19 Mar.):		
	All forms of poultry liver (except raw liver)	30 per cent. <i>ad valorem</i>	22 Mar.
246	The Additional Import Duties (No. 8) Order, 1934 (19 Mar.):		
	Dried plants, &c., used for manufacture of drugs, &c. (additional duty withdrawn).	10 per cent. <i>ad valorem</i>	23 Mar.
470	The Additional Import Duties (No. 17) Order, 1934 (16 May)		
	Feathers of certain kinds (additional duty withdrawn)	"	17 May
478	The Additional Import Duties (No. 18) Order, 1934 (17 May):		
	Horseshoes (additional duty continued indefinitely)	33½ per cent. <i>ad valorem</i>	17 May
508	The Additional Import Duties (No. 19) Order, 1934 (28 May):		
	Glass bottles, &c.	25 per cent. <i>ad valorem</i>	30 May
651	The Additional Import Duties (No. 23) Order, 1934 (28 June):		
	Asparagus (7 Mar. to 15 Apr.)	1½d. per lb.	2 July
	" (at other times)	4d. "	
	Lettuce, endive, chicory (salad):		
	(1 Jan. to last day of Feb.)	5s. per cwt.	
	(1 Mar. to 30 Apr.)	8s. "	
	(1 May to 31 Dec.)	6s. "	
	Cut flowers as follows:		
	Freesia, gypsophila, heather, lilac, marguerite, marigold, mimosa, narcissus (polyanthus types), peony, ranunculus, Star of Bethlehem, stock, violet	2d. "	

No.	Imports	Total duty	Date of operation
	Ixia (1 Feb. to 30 Apr.)	2d. per cwt.	1934
	„ (1 May to 31 Jan.)	9d. „	
	Roman hyacinth (1 Jan. to 15 Mar.)	2d. „	
	„ „ (16 Mar. to 31 Dec.)	9d. „	
	Snowdrop (1 Dec. to 31 Jan.)	2d. „	
	„ (1 Feb. to 30 Nov.)	9d. „	
900	The Additional Import Duties (No. 26) Order, 1934 (17 Aug.):		
	Fruit preserved by chemicals or artificial heat and fruit (other than fresh fruit) preserved by artificial cold; but not including fruit preserved in sugar, or dates		21 Aug
	(i) dried apples, pears, peaches, nectarines	10s. 6d. per cwt.	
	(ii) strawberries, raspberries (includ- ing loganberries), black currants . .	9s. „	
	(iii) red currants	4s. „	
	(iv) gooseberries	3s. „	
	(v) mixed fruits, if containing straw- berries, raspberries (including loganberries), or black currants . .	9s. „	
	(vi) citrus fruits	25 per cent. ad valorem	
	(vii) all other kinds:		
	(a) pulps, except apricot pulp	4s. 6d. per cwt.	
	(b) in other cases (including apric- ot pulp)	25 per cent. ad valorem	
953	The Additional Import Duties (No. 29) Order, 1934 (28 Aug.):		
	Bolts, screws, nails, &c	various	30 At
955	The Additional Import Duties (No. 30) Order, 1934 (30 Aug.):		
	Broccoli and cauliflowers (1 Mar. to 30 June)	4s. per cwt.	1 Sep
	„ „ (1 July to last day of Feb.)	3s. „	
	Carrots (1 May to 15 June)	10s. „	
	„ (16 June to 30 Apr.)	2s. 4d. „	
	Lettuce, endive, chicory (salad):		
	(1 Jan. to last day of Feb.)	5s. „	
	(1 Mar. to 30 Apr.)	10s. „	
	(1 May to 31 Dec.)	8s. „	
	Turnips (1 May to 15 June)	8s. „	
	„ (16 June to 30 Apr.)	2s. 4d. „	
	Tomatoes (1 June to 31 Aug.)	2d. „	
	„ (1 Sept. to 31 Oct.)	1d. „	

No.	Imports	Total duty	Date of operation
	Trees and shrubs (excluding rose-trees, fruit-trees, <i>Azalea indica</i> , and Sweet Bays) other than in flower	20s. per cwt.	1934
1156	The Additional Import Duties (No. 33) Order, 1934 (29 Oct.):		
	Trees and shrubs (excluding rose-trees, fruit-trees, <i>Azalea indica</i> , and Sweet Bays) whether with bare or balled roots, other than in flower (see No. 955, above)	20s. ..	31 Oct.
1295	The Additional Import Duties (No. 35) Order, 1934 (30 Nov.):		
	Superphosphate of lime	10s. a ton, or 20 per cent. <i>ad valorem</i> , whichever is greater	3 Dec.
954	The Import Duties (Exemptions) (No. 10) Order, 1934 (28 Aug.):		
	Seaweed, raw, unground, dried, or bleached, but not further prepared or treated	added to 'free list'	30 Aug.
83	The Import Duties (Foreign Discrimination) Order, 1934 (9 Feb.):		
	Feathers (except under licence) and articles containing feathers (except for padding or stuffing)	20 per cent. <i>ad valorem</i>	13 Feb.
	Fur skins and goods made of fur skin		
650	The Import Duties (Foreign Discrimination) Revocation Order, 1934 (28 June):		
	Revokes the previous Order (No. 83)		2 July

No.	Title and subject	Date of operation
731	The Import Duties (Valuation of Goods) Regulations, 1934 (5 July): <i>Revises the forms of declaration to be made for goods which are dutiable by reference to their value (previous regulations revoked, viz. S.R. and O., 1932, No. 529, &c.).</i>	1934 6 July

Finance Act, 1933

No.	Imports	Total duty	Date of operation
413	The Import Duties (Substitution) (No. 1) Order, 1934 (4 May): <i>Substitutes specific in lieu of ad valorem duties for:</i> Eggs not in shell:		1934
	(i) liquid or frozen	½d. per lb.	8 May
	(ii) dried whole	2½d. "	
	(iii) dried yolk	1½d. "	
	(iv) dried albumen	2½d. "	

Wheat Act, 1932

No.	Title and subject	Date of operation
56	The Wheat (Anticipated Supply) (No. 1) Order, 1934 (29 Jan.): <i>The anticipated supply of home-grown millable wheat (to be grown and sold by registered growers) during the year beginning 1 Aug. 1933 prescribed as 29,000,000 cwt.</i> [<i>Note: it was previously prescribed (under S.R. and O., No. 768, 31 July 1933) as 27,000,000.</i>]	1934 29 Jan
882	The Wheat (Anticipated Supply) (No. 2) Order, 1934 (9 Aug.): <i>The anticipated supply of home-grown wheat for the year beginning 1 Aug. 1934 prescribed as 29,000,000 cwt.</i>	9 Aug
883	The Wheat (Quota Payments) (No. 1) Order, 1934 (9 Aug.): <i>The quota payment for the period commencing 12 Aug. 1934 to be 19½d. per cwt. of flour (S.R. and O., No. 1043, 5 Nov. 1933, revoked).</i>	12 Aug
907	The Wheat (Disputes) Regulations, 1934 (7 Aug.): <i>Regulations laid down to facilitate the de-</i>	

No.	Title and subject	Date of operation
	<i>termination of certain disputes between the Flour Millers' Corporation, &c., and the Wheat Commission.</i>	1934
912	The Wheat (Ascertained Average Price) Order, 1934 (18 Aug.): <i>The average price of home-grown wheat for the year ended 31 July 1934 prescribed as 4s. 7·63d. per cwt. The quantity of home-grown wheat sold during the year ended 31 July 1934 prescribed as 29,570,000 cwt.</i>	7 Aug. 18 Aug.

Improvement of Live Stock (Licensing of Bulls) Act, 1931

239	The Improvement of Live Stock (Licensing of Bulls) (England and Wales) Regulations, 1934 (12 Mar.): <i>Makes the Act applicable to all bulls which attain the age of 10 months on or after 1 Aug. 1934. Prescribes forms of application for, and forms for, licences and for permits to keep unlicensed bulls, and for permits to change the place at which Permit Bulls may be kept.</i>	12 Mar.
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The Milk and Dairies (Amendment) Act, 1922

1317	The Milk (Special Designations) Order, 1934 (28 Nov.): <i>Under the Milk and Dairies (Amendment) Act, 1922, as amended by the Milk Act, 1934, the Minister of Health, after consultation with the Minister of Agriculture, may prescribe special designations for milk. In the present Order he lays down 'Certified' and 'Grade A (Tuberculin Tested)' as such designations, thus continuing existing arrangements.</i>	28 Nov.
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**Agricultural Produce (Grading and Marking) Acts,
1928 and 1931**

<i>No.</i>	<i>Title and subject</i>	<i>Date of operation</i>
72	The Agricultural Produce (Grading and Marking) (Cauliflower and Broccoli) Regulations, 1934 (23 Jan.): <i>Revises the grade designations and marks for cauliflower and broccoli.</i>	1934 23 Jan.
	Similar orders prescribing new or revised grade designations and marks for:	
151	Asparagus.	12 Feb.
198	Leeks.	20 Feb.
199	Radishes.	19 Feb.
200	Red beet.	19 Feb.
204	Cabbage greens and cabbages.	19 Feb.
205	Salad (spring) onions.	19 Feb.
221	Carrots.	22 Feb.
481	Parsnips.	3 May
482	Ripe onions and shallots.	3 May
483	Turnips and swedes.	3 May
492	Watercress.	8 May
503	Horseradish.	8 May
517	Kidney and runner beans.	16 May
602	Mushrooms.	2 June
625	Forced rhubarb.	23 May
719	Canned fruits, viz. apples, blackberries, black currants, cherries, gooseberries, loganberries, plums, damsons, greengages, raspberries, red currants, and strawberries.	29 June
720	Jam.	29 June
749	Canned vegetables, viz. beans, beetroots, carrots, celery, peas, new potatoes, spinach, and turnips.	9 July
825 (S.46)	Canned fruit (Scotland), viz. blackberries, black currants, cranberries, damsons, gooseberries, loganberries, plums, raspberries, red currants, and strawberries.	25 July
1337	Honey.	28 Nov.
1353	Natural rhubarb.	3 Dec.

No.	Title and subject	Date of operation
1354	Stilton cheese.	1934
1388	Hot-house grapes.	5 Dec.
902	The Agricultural Produce (Grading and Marking) (Bottled Fruits) (Amendment) Regulations, 1934 (8 Aug.): <i>Amends the regulations for bottled fruits (S.R. and O., No. 807, 8 Aug. 1933) to allow the term 'unsweetened' as an alternative to 'in water', as part of the grade designations for bottled fruits.</i>	11 Dec. 8 Aug.
Merchandise Marks Act, 1926		
299	The Merchandise Marks (Imported Goods) (No. 3) Order, 1934 (22 Mar.): <i>Imported bacon or ham (unless cooked, canned or potted prior to importation) must be marked in a manner prescribed, to indicate origin.</i>	23 July
301	The Merchandise Marks (Imported Goods) (No. 5) Order, 1934 (22 Mar.): <i>Imported dead poultry, i.e. ducks, fowls (excluding guinea fowl), geese or turkeys, whether dressed or not, must be marked in a manner prescribed, to indicate origin.</i>	23 June
693	The Merchandise Marks (Imported Goods) (No. 6) Order, 1934 (29 June): <i>Imported maize starch (including maize starch cornflour), except for certain small quantities, must be marked in a manner prescribed, to indicate origin.</i>	30 Sept. (extended to 30 Mar. 1935 for maize starch imported before 29 June 1934)
727	The Merchandise Marks (Imported Goods) (No. 7) Order, 1934 (7 July): <i>Imported chilled beef, frozen mutton, frozen</i>	

No.	Title and subject	Date of operation
	<i>lamb, frozen pork, boneless beef, boneless veal, salted beef, salted pork or edible offals, must be marked in a manner prescribed, to indicate origin. (See Nos. 1172, 1173, 1439, and 1440, below.)</i>	1935
1172	The Merchandise Marks (Imported Goods) Exemption Direction (No. 3), 1934 (31 Oct.): <i>Postpones the application of No. 727 (above) to whole carcasses of frozen mutton and frozen lamb until</i>	7 Jan.
1173	The Merchandise Marks (Imported Goods) Exemption Direction (No. 4), 1934 (31 Oct.): <i>Alters the manner of marking laid down by No. 727 (above) for loins of frozen pork from which the skin has been removed prior to importation. The indication of origin may appear on the containers or packages instead of on the loins themselves.</i>	28 Feb.
1185	The Merchandise Marks (Imported Goods) (No. 10) Order, 1934 (9 Nov.): <i>Imported rick covers, tarpaulins, sacks, &c., must be marked in a manner prescribed, to indicate origin.</i>	7 Jan.
1323	The Merchandise Marks (Imported Goods) Exemption Direction (No. 5), 1934 (28 Nov.): <i>Delays the operation of No. 1185 (above) so far as concerns sacks and bags made of woven piece goods of jute until</i>	1 Mar.
1439	The Merchandise Marks (Imported Goods) Exemption Direction (No. 6), 1934 (18 Dec.): <i>Postpones the application of No. 727 (above) to whole carcasses of frozen pork until</i>	1 Apr.
		28 Feb

STATUTORY RULES AND ORDERS

365

No.	Title and subject	Date of operation
1440	The Merchandise Marks (Imported Goods) Exemption Direction (No. 7), 1934 (18 Dec.): <i>Alters the manner of marking laid down by No. 727 (above) for shoulder cuts of frozen pork from which the skin has been removed prior to importation. The indication of origin may appear on the containers or packages instead of on the shoulder cuts themselves.</i>	1934 7 Jan. (1935)

Diseases of Animals Acts, 1894 to 1927

37	The Sheep Scab (Amendment) Order of 1934 (22 Jan.): <i>The Sheep Scab Order, 1928 (S.R. and O., No. 81, 25 Jan. 1928) amended (a) to extend the power (i) to serve notices (ii) of entry and inspection, in the event of double dipping, to Inspectors or other officers of the Ministry of Agriculture and Fisheries as well as to Local Authorities; (b) to allow for the marking of sheep which come under the Sheep Scab Order; (c) to ensure effective dipping by ordering redipping in certain cases; (d) to enlarge the category of sheep for which Isolation and Dipping notices may be served; (e) to enlarge the powers of inspection with regard to double dipping and the examination of sheep, &c.</i>	22 Jan.
992	The Sheep Scab (Amendment) Order of 1934 (No. 2) (12 Sept.): <i>Sheep Scab defined as 'psoroptic scab or sarcoptic scab in sheep.'</i>	12 Sept.

Destructive Insects and Pests Acts, 1877 to 1927 (and other relevant Acts)

244	The Apple Capsid (Essex) (Amendment) Order of 1934 (8 Mar.):	
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No.	Title and subject	Date of operation
	<p><i>Extends the Order of 1932 (S.R. and O., 1932, No. 868) so as to apply to scions, cuttings, or other woody parts of apple-trees, gooseberry or currant bushes, as well as to the trees and bushes themselves.</i></p> <p><i>[Note: any person in Essex other than a private grower, who receives any apple-trees, gooseberry or currant bushes, or woody parts thereof, must notify the Local Authority, who may examine them and order action to be taken against apple capsid.]</i></p>	<p>1934</p> <p>19 Mar.</p>
446	<p>The Importation of Raw Cherries Order of 1934 (7 May):</p> <p><i>Restricts the importation of raw cherries into England and Wales, to prevent the introduction of the Cherry Fruit Fly. Certificates in prescribed form required, stating place of origin. Imports of cherries grown in Spain and in certain parts of France, Italy, and Germany are disallowed.</i></p>	<p>28 May to 30 Sept.</p>
450 (S.27)	<p>The Importation of Raw Cherries (Scotland) Order of 1934 (8 May):</p> <p><i>Order for Scotland (similar to No. 446 above).</i></p>	<p>ditto</p>
631	<p>The Fruit-tree Pests (Isle of Ely) Order of 1934 (25 June):</p> <p><i>Applies the Wisbech District Order of 1931 (S.R. and O., 1931, No. 575) to the whole of the Isle of Ely.</i></p> <p><i>[Under the Order, the Local Authority may require owners of fruit-trees, canes, &c., to treat them against cankers, brown rots, apple and pear scab, aphides, apple sucker, winter moth, codling moth, capsid bugs, and red spiders.]</i></p>	<p>1 July</p>

STATUTORY RULES AND ORDERS

367

No.	Title and subject	Date of operation
684	<p>The Importation of Plants (Amendment) Order of 1934 (30 June):</p> <p><i>Modifies the Order of 1933 (S.R. and O., 1933, No. 558), so that the period of prohibition (except under certificate) applicable to raw vegetables grown in European France now runs from 8 Apr. to 14 Oct. each year. The prescribed certificates are also modified.</i></p>	1934
702	<p>The Importation of Plants (Scotland) (S.41) (Amendment) Order of 1934 (30 June):</p> <p><i>Order for Scotland (similar to No. 684, above).</i></p>	1 July
1066	<p>The Watermark Disease (Essex) Order of 1934 (2 Oct.):</p> <p><i>Authorizes the inspection of willow-trees by Local Authorities in Essex. Where Watermark Disease is found, notice may be served on the occupier of the land to cut down and burn trees, &c.</i></p>	1 Dec.
1314	<p>The Fruit-tree Pests (Cambridgeshire) Order, 1934 (26 Nov.):</p> <p><i>Prescribes measures to be taken to prevent damage to fruit-trees in Cambridgeshire by cankers, &c. (similar to No. 631, above).</i></p>	1 Dec.

Land Settlement (Facilities) Act, 1919

281	<p>Small-holdings and Allotments. Order dated 22 Mar. 1934:</p> <p><i>Revises the list of securities to be taken into account in calculating redemption of perpetual annuities created by County Councils under the Small-holdings and Allotments Act, 1908, in default of agreement.</i></p>	22 Mar.
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Local Government Act, 1933

<i>No.</i>	<i>Title and subject</i>	<i>Date of operation</i>
363	The Local Government (Compulsory Purchase) Regulations, 1934 (11 Apr.): <i>Prescribes procedure, forms of notice, &c., for compulsory purchase of land by local authorities, &c.</i>	1934 1 June

Land Charges Act, 1925 (and other relevant Acts)

285 (L.4)	The Local Land Charges Rules, 1934 (22 Mar.): <i>Lays down rules for registering local land charges (revoking previous rules).</i>	7 May
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Tithe Acts, 1836 to 1925 (and other relevant Acts)

128	Tithes, England. Fees of the Ministry of Agriculture and Fisheries (19 Jan. 1934): <i>Revised scale of fees, payable to the Ministry of Agriculture and Fisheries, for certain Altered Appointments of Rentcharge (England). Applicable to transactions in any proceedings starting after 1 Mar. 1934.</i>	19 Jan.
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Milk and Dairies (Scotland) Act, 1914

675 (S.40)	The Milk and Dairies (Scotland) Order, 1934 (7 June): <i>Revokes the 1925 Order (S.R. and O., 1925, No. 883). The form for registers of dairies and dairymen prescribed. Provisions laid down for protecting milk against infection or contamination. The addition of colouring or thickening matter to cream prohibited (colouring matter in milk is already covered by the Milk and Dairies Amendment Act, 1922). Provisions laid down for the conveyance and labelling of milk.</i>	7 June
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**Acquisition of Land (Assessment of Compensation)
(Scotland) Act, 1931 (and other relevant Acts)**

No.	Title and subject	Date of operation
581 (S.31)	Land, Acquisition of, Scotland. Assessment of Compensation Rules (18 July 1931):	1934
	• <i>Prescribes procedure for settlement by arbitration of questions arising between authorities acquiring land, and claimants.</i>	18 July (1931)

NORTHERN IRELAND

Marketing of Potatoes Act (Northern Ireland), 1934

74 (N.I.)	Marketing of Potatoes Rules (Northern Ireland), 1934 (1 Sept.):	
	<i>Revises the forms for licences for sending potatoes to Great Britain, and for applications for such licences, in accordance with new scale of fees.</i>	
	<i>Licence-holders prohibited from consigning potatoes (except seed potatoes) to Great Britain for sale on commission in Great Britain.</i>	
	<i>Grades, &c., prescribed for potatoes for sale in Belfast.</i>	1 Sept.

Agricultural Marketing Act (Northern Ireland), 1934

94 (N.I.)	The Agricultural Marketing (Northern Ireland) (Compensation) Order, 1934 (14 Nov.):	
	<i>Provides for the proper application of any loan raised by the Bacon Marketing Board (Northern Ireland) before 5 June 1935, for paying compensation to bacon producers for losses incurred by the operation of the Pigs Marketing Scheme between 16 Sept. 1933, and 31 Dec. 1933, inclusive.</i>	
	<i>Empowers the Pigs Marketing Board to</i>	

No.	Title and subject	Date of operation
	<i>cover the Bacon Marketing Board's liabilities on account of the above-mentioned loan, by imposing a special levy of 1s. per pig on pig producers. (Consequential amendments are made to the Pigs and Bacon Marketing Schemes.)</i>	1934 14 Nov.
Milk and Milk Products Act (Northern Ireland), 1934		
62 (N.I.)	The Milk (Equalization Payments) Regulations (Northern Ireland), 1934 (16 Aug.): <i>Lays down regulations as to equalization payments. Forms of application for equalization payment are prescribed. (See No. 123, below.) Equalization payment may be withheld under circumstances indicated in the Order.</i>	16 Aug.
69 (N.I.)	The Milk (Grade A) Regulations (Northern Ireland), 1934 (24 Aug.): <i>Lays down regulations for Grade A milk.</i>	To be appointed by the Minister of Agriculture.
70 (N.I.)	The Milk (Grade B) Regulations (Northern Ireland), 1934 (24 Aug.): <i>Lays down regulations for Grade B milk.</i>	To be appointed by the Minister of Agriculture
71 (N.I.)	The Milk (Grade C) Regulations (Northern Ireland), 1934 (24 Aug.): <i>Lays down regulations for Grade C milk.</i>	To be appointed by the Minister of Agriculture
80 (N.I.)	The Joint Milk Council (First Election of Members) Regulations (Northern Ireland), 1934 (21 Sept.): <i>Lays down regulations for the first election of members to the Joint Milk Council, to represent producers.</i>	21 Sept.

STATUTORY RULES AND ORDERS

371

No.	<i>Title and subject</i>	<i>Date of operation</i>
82 (N.I.)	The Butter and Margarine (Sales) Regulations (Northern Ireland), 1934 (26 Sept.): <i>Lays down regulations regarding the sale of butter and margarine. (See section 4 of the Act, p. 24.) (See No. 121, below.)</i>	1934 To be appointed by the Minister of Agriculture.
86 (N.I.)	The Joint Milk Council (First Election of Members) (No. 2) Regulations (Northern Ireland), 1934 (6 Oct.): <i>Regulations laid down for the first election of members to the Joint Milk Council, to represent distributors.</i>	6 Oct.
88 (N.I.)	The Joint Milk Council (First Election of Members) (No. 2) (Amendment) Regulations (Northern Ireland), 1934 (16 Oct.): <i>The above regulations (No. 86) modified (slight alteration in dates).</i>	16 Oct.
103 (N.I.)	Milk and Milk Products Act (Northern Ireland), 1934. Appointed Day for the Operation of Certain Provisions (5 Dec.): <i>Prescribes 16 Dec. as the day on which the provisions of the Act for the sale of milk under licence come into force.</i>	5 Dec.
114 (N.I.)	Milk and Milk Products Act (Northern Ireland), 1934. Appointed Day for the Operation of Certain Provisions (10 Dec.): <i>Prescribes 16 Dec. as the day on which the provisions of the Act in respect to the sale of butter and margarine under licence come into force.</i>	10 Dec.
121 (N.I.)	The Butter and Margarine (Sales) (Amendment) Regulations (Northern Ireland), 1934 (21 Dec.): <i>Amends the previous regulations (No. 82, above), so that licence-holders must (a) pay the additional licence fee upon butter or</i>	

No.	Title and subject	Date of operatio
	<i>margarine sold to persons other than licence-holders, (b) keep records of sales of butter or margarine for manufacturing purposes.</i>	1934 21 Dec
123 (N.I.)	The Milk (Equalization Payments) (Amendment) Regulations (Northern Ireland), 1934 (21 Dec.): <i>Lays down revised application forms for equalization payment. (See No. 62, above.)</i>	21 Dec

Agricultural Marketing (Pig Industry) Act (Northern Ireland), 1934

122 (N.I.)	The Pigs Marketing (Grading Fee) (Northern Ireland) Order, 1934 (24 Dec.): <i>Imposes on licensed curers a fee of one penny for each carcass graded under S.R. and O., No. 101, q.v. (p. 374).</i>	24 De
127 (N.I.)	Appointed Day for the Operation of Certain Provisions (24 Dec.): <i>Appoints 1 Jan. 1935 as the day on which the provisions of the Act, except Section 5 (which deals with the duties and powers of the Pig Industry Council), shall come into operation.</i>	24 Dec

Destructive Insects and Pests Act (Northern Ireland) 1934

85 (N.I.)	The Importation of Plants (Northern Ireland) (Amendment) Order of 1934 (26 Sept.): <i>Modifies the Order of 1933 so that no raw vegetables or cider apples grown in European France may be imported into Northern Ireland between 8 Apr. and 14 Oct. any year, unless certified in prescribed form. (Precaution against Colorado Beetle.)</i>	15 O
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Diseases of Animals Acts, 1894 to 1927

No.	Title and subject	Date of operation
48 (N.I.)	Sheep Dipping (Special Regulation) Order of 1934 (20 June): <i>Prescribes that between 8 Oct. and 15 Nov. 1934 all sheep shall (with certain exceptions) be dipped twice at an interval of from 7 to 14 days between dippings.</i>	1934 1 Sept.
50 (N.I.)	The Sheep Dipping (Local Regulations) Order of 1934 (22 June): <i>Amends the 1916 Order as to the powers of Local Authorities to make regulations for dipping sheep, and prescribes the methods of notifying the regulations to owners of sheep.</i>	22 June

Agricultural Marketing Act (Northern Ireland), 1933

9 (N.I.)	The Pigs Marketing Scheme (Northern Ireland) (Amendment) Order, 1934 (15 Jan.): <i>Amends the Pigs Marketing Scheme (Northern Ireland), 1933 (Schedule to S.R. and O. of Northern Ireland, 1933, No. 93) as to procedure of elections to the Pigs Marketing Board, and other matters.</i>	15 Jan.
16 (N.I.)	The Marketing of Pigs (Registration of Dealers) Regulations (Northern Ireland), 1934 (1 Feb.): <i>Confines the removal of pigs from Northern Ireland to Great Britain to pig dealers registered with the Ministry of Agriculture.</i>	12 Feb.
19 (N.I.)	The Marketing of Pigs (Form of Dealers' Returns) Order (Northern Ireland), 1934 (8 Feb.): <i>Compels registered pig dealers to send weekly returns to the Ministry of Agriculture showing the movement of pigs through their hands.</i>	12 Feb.

No.	Title and subject	Date of operation
27 (N.I.)	<p>The Agricultural Marketing (Removal of Pigs) Regulations (Northern Ireland), 1934 (19 Mar.):</p> <p><i>Compels registered pig dealers to hold quota certificates and pig-export permits, issued by the Ministry of Agriculture, for all pigs to be removed from Northern Ireland to Great Britain.</i></p>	1934 20 Mar.
89 (N.I.)	<p>The Pigs Marketing Scheme (Northern Ireland) (Amendment) (No. 2) Order, 1934 (30 Oct.):</p> <p><i>Revokes para. (e) of Article 1 of No. 9 (above), so that producers pay contributions per pig to the Board when pigs are sold to curers or to the Board, but not when sold to registered dealers.</i></p>	1 Nov
93 (N.I.)	<p>The Pigs Marketing (Northern Ireland) (Special Levy) (No. 1) Order, 1934 (14 Nov.):</p> <p><i>The Pigs Marketing Board (Northern Ireland) to impose a special levy of 2s. per pig on producers to cover the loss of £7,971 experienced by the Board between 1 Oct. 1933 and 10 Nov. 1934. (See No. 124, below.)</i></p>	From Nov. 1 22 Dec. inclusi
94 (N.I.)	<p>The Agricultural Marketing (Northern Ireland) (Compensation) Order, 1934 (14 Nov.):</p> <p><i>See under the Agricultural Marketing Act (Northern Ireland), 1934, p. 369.</i></p>	
101 (N.I.)	<p>The Pigs Marketing (Grading) (Northern Ireland) Order, 1934 (27 Nov.):</p> <p><i>Lays down that dead pigs for curing into bacon and hams shall be graded by weight and thickness of back fat at the shoulder, as</i></p>	

No.	Title and subject	Date of operation
	<i>himself against loss should the carcass be subsequently certified as unfit for consumption, by a deduction of 6d. from the price of the carcass.</i>	1934 1 Dec.
Marketing of Fruit Act (Northern Ireland), 1931		
84 (N.I.)	Marketing of Fruit Rules (Northern Ireland), 1934 (26 Sept.): <i>Prescribes packing material for, and specifications of, baskets containing apples for sale to retailers (for resale by them).</i>	1 Oct.
Slaughtered Animals (Compensation) Act (Northern Ireland), 1928 (and other relevant Acts)		
92 (N.I.)	The Slaughtered Animals (Compensation) Act (Northern Ireland), 1928 (Suspension of Charges) Order, 1934 (12 Nov.): <i>The Compensation Fund having amounted to £10,000, the payment to the fund of charges for animals exported to Great Britain is suspended.</i>	From 15 Nov. 1934 until 1 Nov. 1935

TABLE I. *Numbers of Pigs contracted for and delivered under the Great Britain Pigs Marketing Scheme, 1933-4*

	<i>Contracted</i>	<i>Delivered and accepted*</i>	<i>Percentage excess (+) or deficiency (-)</i>
Nov. 1933	155,547	137,864	-11·4
Dec.	139,706	133,469	- 4·5
Jan. 1934	134,146	116,903	-12·9
Feb.	148,197	98,146	-33·8
Total, first period	577,596	486,382	-15·8
Mar. 1934	45,825	63,272	+38·1
Apr.	81,918	75,085	- 8·3
May	99,890	96,972	- 2·9
June	113,840	103,940	- 8·7
July	130,530	111,395	-14·7
Aug.	152,235	135,872	-10·7
Sept.	176,622	152,342	-13·7
Oct.	182,189	180,820	- 0·8
Nov.	176,743	161,990	- 8·3
Dec.	163,384	150,275	- 8·0
Total, second period	1,323,176	1,231,963	- 6·9
Grand total	1,900,772	1,718,345	- 9·6

* Answer by the Minister of Agriculture in the House of Commons, 11 February 1935.

APPENDIX

TABLE II. Utilization of Milk under the Milk Marketing Scheme, October 1933 to December 1934

	Sold liquid			Manufactured			Total sales		Percentage manufactured	
	Under wholesale contracts*	By producer retailers†	Total	Under wholesale contracts*	By farm-house cheese-makers	Total	Under wholesale contracts*	Under all contracts	Of total wholesale sales	Of all sales
Oct. 1933	37,446,043	9,348,045	46,794,088	7,106,452	..	7,106,452	44,552,295	53,000,340	16.0	13.2
Nov. . .	43,049,868	9,785,168	52,834,036	8,832,033	..	8,832,033	51,882,741	61,667,849	17.0	14.3
Dec. . .	41,514,037	9,779,179	51,293,216	9,000,997	..	9,000,997	53,514,044	63,204,114	16.8	14.4
Jan. 1934	44,036,080	9,323,208	53,379,378	11,214,652	..	11,214,652	55,270,732	64,595,030	20.3	17.4
Feb. . .	41,050,170	8,260,345	49,310,515	11,386,342	..	11,386,342	52,430,512	60,690,857	21.7	18.8
Mar. . .	45,033,216	9,352,757	54,385,973	15,733,876	..	15,733,876	60,767,092	70,119,849	25.9	22.4
Oct. 1933—	255,149,354	55,846,723	310,996,077	63,268,962	..	63,268,962	318,418,316	374,267,039	19.9	16.9
Mar. 1934	43,203,304	8,531,245	51,734,549	18,037,154	2,492,600	20,529,814	61,240,488	72,264,363	29.2	28.0
Apr. . .	45,508,347	8,377,062	53,885,409	20,699,080	3,453,613	33,152,693	75,207,427	87,031,102	39.4	38.1
May . . .	43,764,497	8,518,045	52,282,542	16,733,875	3,673,455	20,407,330	72,417,372	84,740,773	39.6	38.1
June . . .	44,509,143	8,807,177	53,316,320	10,156,786	3,447,466	22,604,332	64,725,031	75,080,754	29.6	29.8
July . . .	44,005,300	8,851,154	52,856,454	18,123,528	3,004,916	21,128,444	62,188,894	74,045,062	29.1	28.5
Aug. . .	43,543,200	7,235,134	50,778,334	15,795,176	2,773,752	18,478,928	59,248,442	69,257,328	20.5	20.7
Apr.—Sept. 1934	264,673,925	59,461,416	315,135,341	129,354,599	18,846,042	148,200,641	395,028,524	463,335,982	32.7	32.0
Oct. . .	45,558,875	Not available	Not available	16,699,955	1,199,866	18,099,322	62,258,830	Not available	26.8	Not available
Nov. . .	45,273,436	Not available	Not available	15,893,676	305,869	16,199,545	61,167,112	Not available	26.0	Not available
Dec. § . .	45,158,478	Not available	Not available	17,753,148	252,200	18,005,457	63,911,626	Not available	28.2	Not available

* Excludes milk for which returns were obtained too late to be included in the original pools. † Excludes sales on which the levy was not assessed on the milkage sold. ‡ 6-31 October. § Provisional.

TABLE III. Percentage of Wholesale Sales of Milk manufactured in the Various Regions monthly from October 1930 to December 1934

	Northern	North-western	Eastern	Midland	East Midland	West Midland	North Wales	South Wales	Southern	Mid-western	Far Western	South-eastern	Total
Oct. 1933	5.45	11.24	3.70	7.45	32.73	16.74	35.62	5.67	34.33	27.02	1.40	15.95	
Nov.	8.28	14.38	4.88	9.74	31.06	20.30	26.71	7.11	33.01	35.18	1.97	17.02	
Dec.	15.32	16.37	5.37	11.01	26.94	15.77	25.83	6.38	30.67	33.07	2.17	16.82	
Jan. 1934	16.98	20.96	6.59	12.86	35.88	21.03	28.48	7.90	35.22	30.83	2.60	20.20	
Feb.	18.64	23.26	6.68	13.95	36.33	21.70	30.33	9.25	36.83	38.80	2.69	21.71	
Mar.	19.88	26.98	8.23	15.37	44.74	26.20	31.32	13.46	43.25	48.14	1.91	23.89	
Oct. 1933-Mar. 1934	14.53	19.37	6.06	11.97	34.92	21.06	28.03	8.46	35.70	37.00	2.36	19.87	
Apr.	13.74	32.00	6.88	22.78	46.49	27.56	36.06	15.05	47.50	58.12	2.36	20.18	
May	23.30	40.72	14.54	30.85	62.18	50.19	50.87	19.43	61.37	60.63	4.83	30.44	
June	25.08	41.74	12.81	29.39	58.69	51.11	49.50	19.78	60.83	63.41	3.96	30.54	
July	19.59	31.30	8.01	21.08	43.57	34.30	28.09	12.52	45.06	58.31	2.57	20.60	
Aug.	18.86	32.52	6.81	22.30	48.65	20.35	25.40	11.02	44.21	54.64	2.32	20.14	
Sept.	25.28	28.28	7.04	18.72	40.39	31.97	25.66	10.44	41.50	55.90	1.15	20.51	
Apr.-Sept. 1934	19.00	34.98	10.97	25.03	50.83	38.70	36.15	11.35	51.03	58.74	3.11	32.75	
Oct.	21.79	25.48	9.00	15.70	43.97	43.57	27.30	11.21	43.20	58.52	2.61	26.01	
Nov.	21.40	25.19	9.55	16.38	43.30	47.82	24.58	12.30	41.68	53.19	2.78	25.98	
Dec.	26.95	28.47	13.48	19.52	44.90	44.86	25.44	13.62	45.32	51.08	3.78	28.14	

APPENDIX

TABLE IV. Percentage Utilization of Manufactured Milk under the Milk Marketing Scheme, October 1933 to December 1934

	Butter	Cheese	Con- densed milk	Con- densed milk for export	Milk powder	Fresh cream	Tinned cream	Chocolate	Other goods	Total
Oct. 1933	17.1	32.6	14.5	3.3	7.5	20.3	1.4	0.1	3.2	100
Nov. . . .	22.4	30.6	15.8	2.6	5.3	19.1	1.0	..	3.2	100
Dec. . . .	18.4	26.9	16.5	1.7	4.2	28.0	1.0	..	3.3	100
Jan. 1934	23.3	31.1	14.8	1.5	4.2	19.6	2.4	0.1	3.0	100
Feb. . . .	23.0	30.8	14.5	2.4	3.9	19.0	3.7	0.1	2.6	100
Mar. . . .	22.6	30.2	17.4	2.9	4.2	17.7	3.2	0.1	1.7	100
Oct. 1933- Mar. 1934	21.6	30.3	15.7	2.4	4.7	20.2	2.3	0.1	2.7	100
Apr. . . .	22.0	31.4	19.7	4.1	3.5	15.2	2.5	0.1	1.5	100
May	21.9	37.9	18.2	3.1	4.9	10.6	2.5	..	0.9	100
June	20.4	37.4	17.8	3.2	4.1	13.4	2.8	..	0.9	100
July	20.1	28.8	17.0	4.7	3.5	20.1	4.2	0.1	1.5	100
Aug. . . .	20.6	27.0	21.6	2.9	4.3	18.3	4.0	..	1.3	100
Sept. . . .	23.8	28.0	18.3	2.6	4.5	18.0	3.0	..	1.8	100
Apr.-Sept. 1934	21.4	32.8	18.6	3.4	4.2	15.2	3.1	..	1.3	100
Oct. . . .	21.8	29.9	18.7	2.8	5.9	15.9	2.0	0.1	2.9	100
Nov. . . .	23.4	30.7	18.7	2.8	5.1	14.7	2.4	0.1	2.1	100
Dec. . . .	24.2	30.1	17.8	2.0	4.5	18.2	1.9	..	1.3	100

TABLES

381

TABLE V. Regional Pool Prices, October 1933 to December 1934, in Pence per Gallon

	Northern	North-eastern	Eastern	East Midland	West Midland	North Wales	South Wales	Southern	Mid-western	Far Western	South-eastern	Unweighted average
Oct. 1933	13½	13½	14	13½	12½	13½	13½	14	12½	13½	14½	13.55
Nov.	14	14	14½	14½	13½	13½	13½	14½	13½	13½	14½	13.95
Dec.	14½	14	14½	14½	14	14	14½	14½	14½	13½	15½	14.32
Jan. 1934	14	14	14½	14	13½	13½	13½	14½	13½	13	14½	13.98
Feb.	13½	13½	14½	14	13	13½	13½	14½	13	13	14½	13.64
Mar.	12½	12	12½	12½	11½	12	12	12½	11½	11½	12½	12.02
Apr.	10½	10½	10½	10½	10½	10½	10½	10½	10½	10½	11½	10.64
May	10	10	10½	10	9½	10	10	10½	9½	9½	10½	10.02
June	10½	10½	10½	10½	10	10½	10½	10½	10	10½	11½	10.25
July	10½	10½	10½	10½	10½	10½	10½	10½	10½	10½	11½	10.52
Aug.	10½	10½	10½	10½	10½	10½	10½	11	10½	10½	11½	10.77
Sept.	10½	10½	11	10½	10½	10½	11	11	10½	10½	11½	10.82
Oct.	13½	13½	14½	14	12½	12½	12½	14½	13	12½	14½	11.55
Nov.	14	14	14½	14	13	14	14	14½	13	13	14½	11.80
Dec.	14½	14½	14½	14	14	14	14½	14½	14½	14	14½	14.34

TABLE VI. Sales of Milk under the Scottish Milk Marketing Scheme, December 1933 to November 1934*

	Sold liquid			Manufactured			Total sales			Percentage manufactured	
	By category producers			By farm-house makers			Total			Of all milk	Of all milk
	By Board	Gallons	Total	By Board	Gallons	Total	By Board	Gallons	Total	By Board	per cent.
Dec. 1933	3,576,793	2,127,898	5,704,691	770,935	770,935	770,935	4,347,638	6,475,536	17.7	31.0	
Jan. 1934	1,570,865	1,890,746	3,461,611	1,102,628	1,102,628	1,102,628	4,671,493	6,573,430	21.6	16.8	
Feb.	3,343,669	1,697,064	5,040,733	1,231,015	5,021	1,236,036	4,574,684	6,276,769	26.9	19.7	
Mar.	4,090,932	1,859,255	5,950,207	2,223,163	581,194	2,804,357	6,314,115	8,754,564	35.2	32.0	
Dec. 1933-Mar. 1934	14,582,189	7,583,063	22,166,152	5,327,741	586,215	5,913,956	19,990,030	28,080,168	26.8	21.1	
Apr.	3,803,083	1,640,489	5,443,572	3,822,067	1,184,194	4,006,261	6,716,030	9,546,733	42.0	42.0	
May	4,300,439	1,605,320	5,905,759	3,796,010	1,981,987	5,778,007	8,187,049	11,774,556	40.4	49.1	
June	4,468,483	1,589,600	6,058,083	4,090,122	1,492,059	5,582,081	5,507,665	11,566,404	48.2	48.1	
July	4,494,585	1,574,807	6,069,392	3,392,959	1,802,034	5,194,993	7,884,642	11,321,183	43.0	46.4	
Aug.	4,296,693	1,477,848	5,774,541	3,037,282	1,495,799	4,533,081	7,332,247	10,371,694	41.4	43.9	
Sept.	4,148,227	1,381,041	5,529,268	2,401,786	1,145,271	3,547,057	6,590,013	9,076,325	36.7	39.1	
Apr.-Dec. 1934	35,628,770	9,279,305	44,908,075	19,548,896	9,132,244	28,681,140	43,777,666	63,589,155	43.3	45.1	
Oct.	4,280,471	1,314,745	5,595,216	2,082,637	549,611	2,632,268	6,363,108	8,227,482	32.7	35.0	
Nov.	4,176,670	1,110,014	5,286,684	1,758,922	68,498	1,827,420	5,935,592	7,121,114	29.6	24.7	
Dec.†	..	..	5,477,660	..	..	1,751,956	..	7,229,616	..	24.2	

* Supplied by the Scottish Milk Marketing Board.

† Provisional.

TABLE VII. Percentage Utilization of Manufacturing Milk under the Scottish Milk Marketing Scheme, December 1933 to December, 1934*

	Fresh cream	Tinned cream	Full-cream cheese	Butter	Full-cream condensed milk	Full-cream milk powder	Other purposes	Total
Dec. 1933.	77.4	0.1	5.4	10.9	0.7	0.4	5.1	100
Jan. 1934.	68.1	4.3	13.8	9.0	0.3	..	4.5	100
Feb.	67.6	7.4	5.0	8.8	7.2	..	4.0	100
Mar.	44.7	6.2	29.2	7.8	5.8	..	6.3	100
Dec. 1933-Mar. 1934	59.5	5.2	17.0	8.7	4.3	0.1	5.2	100
Apr.	36.8	5.1	39.1	6.6	1.2	3.0	8.2	100
May	27.9	6.5	50.7	7.2	0.5	3.9	3.3	100
June	28.1	5.3	54.2	7.3	1.9	0.5	2.7	100
July	37.1	5.4	46.0	7.1	1.9	0.1	2.8	100
Aug.	36.5	4.0	46.8	6.8	4.2	..	1.7	100
Sept.	44.4	0.7	39.5	7.8	2.6	0.2	4.8	100
Apr.-Sept. 1934	34.2	4.7	47.0	7.1	2.0	1.3	3.7	100
Oct.	42.6	2.4	35.4	10.0	7.3	0.1	2.2	100
Nov.	48.4	2.0	30.4	10.7	6.0	0.1	2.4	100
Dec.	65.4	1.5	17.5	10.6	3.7	..	1.3	100

* Excluding farm-house cheese; supplied by the Scottish Milk Marketing Board.

APPENDIX

TABLE VIII. Average Monthly Retail Prices of Agricultural Produce in Great Britain, 1934.*

(per lb. unless otherwise indicated)

	Jan.		Feb.		Mar.		Apr.		May		June		July		Aug.		Sept.		Oct.		Nov.		Dec.		Average 1934		Index number 1934
	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.	
Beef, ribs:	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	140
Chilled or frozen	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	9	134	
Mutton, legs:																											
British	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	154
Frozen	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	140	
Bacon, streaky [†]	1	0	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	116	
Flour, per 7 lb.	7	1	7	1	7	1	7	1	7	1	7	1	7	1	7	1	7	1	7	1	7	1	7	1	7	130	
Bread, per 4 lb.	6	1	6	1	6	1	6	1	6	1	6	1	6	1	6	1	6	1	6	1	6	1	6	1	6	127	
Milk, per qt.	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	91	
Butter, fresh	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	80	
" salt	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	100	
Eggs, fresh, each	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	1	2	128	
Cheese [‡]	5	1	5	1	5	1	5	1	5	1	5	1	5	1	5	1	5	1	5	1	5	1	5	1	5	127	
Potatoes, per 7 lb.	124		120		118		116		114		114		114		114		114		114		114		114		114	123	
Index of all 1934	123		122		119		115		114		114		114		114		114		114		114		114		114	120	123
Food prices } 1933																											123

* Compiled from the Ministry of Labour Gazette; prices are taken at the beginning of each month.
 † Average of twelve months.
 ‡ Usually Canadian or New Zealand.

INDEX

- Abattoir Design, Technical Committee on, 63, 184-6.
- Acquisition of Land (Assessment of Compensation) (Scotland) Act, 1931, Statutory Rule and Order under, 369.
- Acts of Parliament, 12-30.
- Agricultural Credits Act, 1928, 334-6.
- Agricultural Marketing Acts, 1931 and 1933, Statutory Rules and Orders under, 353-6.
- Agricultural Marketing Act (Northern Ireland), 1933, Statutory Rules and Orders under, 373-5.
- Agricultural Marketing Act (Northern Ireland), 1934, 23; Statutory Rule and Order under, 369.
- Agricultural Marketing Facilities Committees, 177-8.
- Agricultural Marketing (Pig Industry) Act (Northern Ireland), 1934, 28, 136-8; Statutory Rules and Orders under, 372.
- Agricultural Mortgage Corporation, 334-8.
- Agricultural Produce (Grading and Marking) Acts, 1928-31, Statutory Rules and Orders under, 362-3.
- Agricultural Produce (Meat Regulation) Act (Northern Ireland), 1930, Statutory Rules and Orders under, 375.
- Argentina, imports from: bacon and hams, 236, barley, 266, beef, 225, 227, butter, 244, mutton and lamb, 231, oats, 268, poultry, 259, wheat, 262, wool, 292.
- regulation of imports from, 45, 46, 52, 53.
- Trade Agreement with, 31-3, 46.
- Wheat Agreement, 40-2, 44.
- Australia, imports from: barley, 266, beef, 50, 227, butter, 244, cheese, 248, eggs, 255, mutton and lamb, 50, 231, sugar, 281, wheat, 262, wool, 292.
- Australia, regulation of imports from, 47, 49.
- Wheat Agreement, 40, 42.
- Bacon, home production of, 235.
- imports of, 233-7.
- Indemnity Loan Committee, 62, 183, 184.
- Marketing Board, 115, 116, 119, 122, 125-30, 178.
- Marketing Board (Northern Ireland), 131, 137-8.
- Marketing Scheme, 62, 126-30.
- Marketing Scheme (Northern Ireland), 62, 137-8.
- prices of, 217, 235, 237, 238.
- regulation of imports, 50-3, 237.
- Barley, home production of, 207, 265.
- imports of, 265-6.
- prices of, 266-7.
- supplies of, 214, 265.
- Beef, home production of, 208, 222.
- imports of, 46-8, 50, 222, 225-7.
- prices of, 224, 226, 227.
- regulation of imports, 45-8.
- Subsidy, 9, 191, 197-9.
- supplies of, 213.
- Belgium, exports to, wool, 291.
- imports from: eggs, 255, potatoes, 271.
- regulation of imports from, 57-9.
- Brazil, imports from: beef, 225, 227, sugar, 281.
- Brewers' Society, 156, 157, 174, 178-83.
- British Sugar (Subsidy) Act, 1934, 17, 190, 202, 279.
- Statutory Rule and Order under, 353.
- Bulls, Licensing of, 344-7.
- Butter, home production of, 243.
- imports of, 244-5.
- prices of, 245-7.
- regulation of imports, 55-6.

- Canada, exports to: wool, 291.
 — imports from: bacon and hams, 236, barley, 266, butter, 244, cheese, 248, eggs, 255, live cattle, 223, oats, 268, wheat, 262.
 — regulation of imports from, 49, 50, 59, 60.
 — Wheat Agreement, 40, 42.
- Canary Islands, imports from: potatoes, 273.
 — regulation of imports from, 59.
- Cattle Committee, 17, 63, 197, 198.
 — Diseases of, Committee on, 186-9.
 — Fund, 15, 16, 197.
 — imports of, 48, 49, 223.
 — prices of, 224.
 — regulation of imports, 48-9.
 — Subsidy for, 9, 191, 197-9.
- Cattle Industry (Emergency Provisions) Act, 1934, 15-17, 197; Statutory Rules and Orders under, 352.
- Census of 1931, 317-19.
- Channel Islands, imports from: potatoes, 273.
 — regulation of imports from, 59.
- Cheese, home production of, 247-8.
 — imports of, 248-9.
 — prices of, 249-50.
- Chile, imports from: barley, 266, mutton and lamb, 231, oats, 268, wool, 292.
- China, imports from: eggs, 255.
- Colorado Beetle, 271, 348-9.
- Committees of Investigation, 62, 173-7.
- Commodity prices, 214-16.
- Condensed Milk, *see* Milk Products.
- Consumers' Committees, 62, 168-73.
- Cream, home production of, 240.
 — imports of, 241-2.
 — prices of, 242-3.
- Credit, 334-41.
- Danubian Countries, Wheat Agreement, 40, 43, 44.
- Debts Clearing Offices and Import Restriction Act, 1934, 18.
- Denmark, imports from: bacon and hams, 236, butter, 244, cream, 242, eggs, 255.
- Depressed Areas (Development and Improvement) Act, 1934, 342.
- Destructive Insects and Pests Acts, 1877-1927, Statutory Rules and Orders under, 365-7.
- Destructive Insects and Pests Act (Northern Ireland), 1934, 30; Statutory Rule and Order under, 372.
- Diseases of Animals Acts, 1894-1927, Statutory Rules and Orders under, 365, 373.
- Diseases of Animals (Dairy Cattle) Act (Northern Ireland), 1934, 27-8.
- Eggs, home production of, 209, 253, 254.
 — imports of, 254-6.
 — prices of, 256.
 — regulation of imports, 56, 57.
 — supplies of, 213.
- Eggs and Poultry, Reorganization Commissions for, 9, 62, 144-50.
- Egypt, Trade Agreement with, 31, 33.
- Employment, Agricultural workers, number of, 315-20.
 — Unemployment Insurance, 327-9.
- Estonia, imports from: bacon and hams, 236, butter, 244.
 — regulation of imports from, 52, 53.
 — Trade Agreement with, 31, 32, 37, 38.
- Fat Stock, N.F.U. Scheme for marketing of, 144.
 — Reorganization Commission for, 9, 62, 138-42, 184.
 — Reorganization Commission (Scotland), 142, 143.
- Feeding stuffs, prices of, 295-7.
- Fertilizers, prices of, 294.
- Finance Act, 1933, Statutory Rule and Order under, 360.
- Finance Act, 1934, 17, 18; Statutory Rule and Order under, 35

- Finland, imports from: bacon and hams, 236, butter, 244.
 Food Council, 62, 177.
 Food prices, retail, 216-22, 384.
 Foot-and-mouth disease, 347-8.
 France, exports to: wool, 291.
 — imports from, potatoes, 271, 273, poultry, 259, wheat, 262.
 — regulation of imports from, 348, 349.
 — Trade Agreement with, 31, 34, 35.
 Fruit, home production of, 284.
 — imports of, 284-7.
 — Marketing Scheme for, 163-4.
 — prices of, 288, 289.
- Germany, exports to: wool, 291.
 — imports from: bacon and hams, 236, oats, 268, potatoes, 271, wheat, 262.
 — Trade Agreement with, 31, 32, 36.
- Hay, home production of, 207.
 — prices of, 297.
- Hops, Amendment Scheme for, 3, 157.
 — home production of, 207, 275.
 — imports of, 275, 276.
 — Levy Fund, 180-2.
 — Marketing Board, 155-8, 174, 178-83.
 — Marketing Scheme, 62, 155.
 — Permanent Joint Committee, 157, 180-3.
 — prices of, 275, 276.
 — Provisional Hops Committee, 62, 178-83.
- Hungary, imports from: poultry, 259.
- Imports, 210-12.
- Import Duties Act, 1932, 10, 164;
 Statutory Rules and Orders under, 357-9.
- Import Duties Advisory Committee, 62, 164-7.
- Improvement of Land Acts, 334, 335.
- Improvement of Livestock (Licensing of Bulls) Act, 1931, 344-7;
 Statutory Rule and Order under, 361.
- India, imports from: wheat, 262, wool, 292.
 International Sugar Council, 282.
- Irish Free State, imports from: bacon and hams, 236, butter, 244, cream, 242, eggs, 255, live cattle, 223, oats, 268, potatoes, 271, poultry, 259.
 — — — regulation of imports, from, 48, 49, 54, 56-9.
- Italy, exports to: wool, 291.
 — imports from: cheese, 248.
- Land Charges Act, 1925, Statutory Rule and Order under, 368.
- Land Settlement, 342-3.
- Land Settlement (Facilities) Act, 1919, Statutory Rule and Order under, 367.
- Land Settlement (Scotland) Act, 1934, 21.
- Lands Improvement Company, 334-6.
- Latvia, imports from: bacon and hams, 236, butter, 244.
 — regulation of imports from, 52, 53.
 — Trade Agreement with, 31, 38, 39.
- Lithuania, imports from: bacon and hams, 236, butter, 244.
 — regulation of imports from, 52, 53.
 — Trade Agreement with, 31, 35, 36.
- Local Government Act, 1933, Statutory Rule and Order under, 368.
- Mangolds, home production of, 207.
- Marketing of Dairy Produce Acts (Northern Ireland), 1929 and 1933, Statutory Rule and Order under, 375.
- Marketing of Fruit Act (Northern Ireland), 1931, Statutory Rule and Order under, 376.
- Marketing of Potatoes Act (Northern Ireland), 1934, 22; Statutory Rule and Order under, 369.

- Marketing Reorganization Com-
missions:
- Eggs and Poultry: England and
Wales, 144-7; Great Britain,
150; Scotland, 148-50.
 - Fat Stock: England and Wales,
138-42; Scotland, 142-3.
 - Milk: Great Britain, 113-14.
- Marketing Schemes, 61.
- Market Supply Committee, 62, 167,
168.
- Merchandise Marks Act, 1926,
Statutory Rules and Orders
under, 363-5.
- Milk, Accredited Producers of, 80,
81.
- Attested Herd Scheme, 81, 194.
 - home production of, 238.
 - Inter-regional Compensation
Fund, 66, 68, 72, 77.
 - Joint Milk Council (Northern
Ireland), 24-6, 108-10.
 - Marketing Boards, Aberdeen
and District, 98-103, 192, 194.
 - — — England and Wales, 3-6,
66-81, 169-71, 174, 178, 192-
6.
 - — — North of Scotland, 103-7,
192, 194, 195.
 - — — Scotland, 81-97, 176, 178,
192-6.
 - Marketing Schemes, 61-6.
 - — — Argyllshire, 112-13.
 - — — Aberdeen and District,
97-103.
 - — — England and Wales, 66-
81.
 - — — Moray and Banff, 110-12.
 - — — Northern Ireland, 107-
10.
 - — — North of Scotland, 103-7.
 - — — Scotland, 81-97, 382-3.
 - prices of, 239, 240.
 - Publicity Advisory Committee,
195.
 - Regional Pool prices for, 381.
 - Reorganization Commission for
(Great Britain), 113, 114.
 - subsidies, 191-7.
 - supplies of, 213.
 - utilization of, 75, 378.
- Milk Act, 1934, 4, 12-15, 191-7;
- Statutory Rule and Order under,
352.
- Milk and Dairies Amendment Act,
1922, Statutory Rule and Order
under, 361.
- Milk and Dairies (Scotland) Act,
1914, Statutory Rule and Order
under, 368.
- Milk and Milk Products Act (Nor-
thern Ireland), 1934, 23-7; Sta-
tutory Rules and Orders under,
370-2.
- Milk in Schools Scheme, 78, 79,
195-7.
- Milk Products, condensed and
powdered, home production of,
250, 251.
- — imports of, 251-3.
 - — prices of, 253.
 - — regulation of imports, 53-5.
- Mutton and lamb, home produc-
tion of, 208, 228.
- — imports of, 228, 231.
 - — prices of, 230-2.
 - — regulation of imports, 49, 50.
 - — supplies of, 213.
- Netherlands, imports from: bacon
and hams, 236, butter, 244,
cheese, 248, cream, 242, eggs, 255,
potatoes, 271, 273, poultry, 259.
- regulation of imports from, 52,
53, 59.
 - Trade Agreement with, 31, 32,
37.
- New Zealand, Dairy Produce Con-
trol Board, 56.
- — imports from, beef, 227,
butter, 244, cheese, 248, mutton
and lamb, 231, wool, 292.
 - — regulation of imports from,
47, 49, 50.
- Northern Ireland, Acts of Parlia-
ment, 22-30.
- — Bacon Marketing Board, 131,
137-8.
 - — Bacon Marketing Scheme,
62, 137, 138.
 - — Joint Milk Council, 24-6,
108-10.
 - — Milk Marketing Scheme, 62,
107-10.

- Northern Ireland, Pigs Marketing Board, 130-7.
 — Pigs Marketing Scheme, 28, 62, 130-7.
 — Pig Industry Council, 28-30, 136, 137.
 — regulation of imports from, 58.
 — Statutory Rules and Orders under Acts of Parliament, 369-76.
- Norway, imports from: bacon and hams, 236, butter, 244.
- Oats, home production of, 207, 268.
 — imports of, 268-9.
 — prices of, 267, 269.
 — regulation of imports, 59, 60.
 — supplies of, 214.
- Ottawa Agreements Act, 1932, 45.
- Persia, imports from: barley, 266.
- Pig Industry Development Board, 7, 126-30.
- Pigs and Pig Products, home production of, 208, 232, 234, 235.
 — imports of, 233, 236.
 — prices of, 234, 235, 237.
 — supplies of, 213.
- Pigs Marketing Board, Great Britain, 6, 7, 115-25, 127-30, 174, 177.
 — Northern Ireland, 130-7.
 — Scheme, Great Britain, 62, 115-25, 129, 169, 377.
 — Northern Ireland, 28, 62, 130-7.
- Poland, imports from: bacon and hams, 236, butter, 244, eggs, 255.
 — regulation of imports from, 52, 53.
- Pork, *see* Pigs and Pig Products.
- Potatoes, home production of, 270.
 — imports of, 270-4.
 — Marketing Board, 8, 151-5.
 — Marketing Scheme, 7, 150-5.
 — prices of, 272-5.
 — regulation of imports of, 57-9, 155.
 — supplies of, 214.
- Poultry, home production of, 209, 257, 258.
 — imports of, 258-60.
 — prices of, 260-1.
 — supplies of, 213.
- Quantitative Regulation, 9, 10, 44-60.
- Queen Anne's Bounty, 330-2.
- Raspberries, Scottish Marketing Board, 162, 163.
 — Scottish Marketing Scheme, 161-3.
- Road and Rail Traffic Act, 1933, 349-51.
- Road Traffic Act, 1934, 19, 20;
 Statutory Rules and Orders under, 353.
- Rumania, imports from: barley, 266.
- Rural Water Supplies Act, 1934, 20, 344.
- Russia, imports from: bacon and hams, 236, barley, 266, butter, 244, oats, 268, poultry, 259, wheat, 262.
 — regulation of imports from, 52, 53.
 — Trade Agreement with, 31, 33-4.
- Scotland, Agricultural Marketing Facilities Committee, 178.
 — *Agricultural workers, numbers* of, 315-20.
 — Committee of Investigation, 173-7.
 — Consumers' Committee, 171-3.
 — Credit, 338-41.
 — Land Settlement Act, 1934, 21.
 — Licensing of Bulls, 346-7.
 — Milk Marketing Board, 81-97, 176, 178, 192-6.
 — — — Aberdeen and District, 98-103, 192, 194.
 — — — North of Scotland, 103-7, 192, 194, 195.
 — — — Scheme, 62, 63, 81-97, 382, 383.
 — — — Argyllshire, 112-13.
 — — — Aberdeen and District, 97-103.

- Scotland, Milk Marketing Scheme, Moray and Banff, 110-12.
 ———— North of Scotland, 103-7.
 — Rasperry Marketing Board, 162-3.
 ———— Scheme, 161-3.
 — Reorganization Commission for Fat Stock, 142-3.
 ———— Eggs and Poultry, 148-50.
 — Statutory Rules and Orders under Acts of Parliament, 368-9.
 — Wages of agricultural workers, 325-7.
 — Weather, 311-14.
 Sheep and Lambs, imports of, 229.
 ———— prices of, 229-30.
 Slaughtered Animals (Compensation) Act (Northern Ireland), 1928, Statutory Rules and Orders under, 376.
 Small Holdings Act, 1926, 336-8.
 South Africa, imports from: butter, 244, beef, 50, eggs, 255, sugar, 281, wool, 292.
 South America, regulations of imports from, 49.
 Spain, imports from: potatoes, 273.
 — regulation of imports from, 59.
 Statistics, 298-314.
 Statutory Rules and Orders, 352-76.
 Straw, prices of, 297.
 Sugar, Chadbourne plan, 281, 282.
 — home production of, 280.
 — imports of, 281.
 — Marketing Scheme, 1, 159-61.
 — prices of, 283.
 Sugar Beet, home production of, 207, 276, 277.
 ———— Marketing Scheme, 1, 158, 159.
 ———— subsidy, 1, 191, 202-4, 277, 280.
 Sugar Industry Inquiry Committee, 1, 159, 161, 190, 280.
 Supply of Water in Bulk Act, 1934, 20.
 Sweden, imports from: bacon and hams, 236, butter, 244.
 — regulation of imports from, 52, 53.
 Switzerland, imports from: cheese, 248.
 Tithe Acts, 1836 to 1925, Statutory Rules and Orders under, 368.
 Tithe Rentcharge, 330-4.
 Trade Agreements, 10, 31-44.
 Turnips and Swedes, home production of, 207.
 Unemployment Act, 1934, 19, 327.
 Unemployment Insurance Statutory Committee, 327-9.
 United States, exports to: wool, 291.
 ———— imports from: bacon and hams, 236, barley, 266, poultry, 259, sugar, 281, wheat, 262.
 ———— regulation of imports from, 52, 53.
 ———— Wheat Agreement, 40, 42.
 Uruguay, imports from: beef, 225, 227, mutton and lamb, 231, wool, 292.
 U.S.S.R., see Russia.
 Vegetables, home production of, 289.
 — imports of, 289, 290.
 — prices of, 290, 291.
 Wages, minimum rates of, for agricultural workers, 320-2.
 — changes in, 323.
 Water Supplies, Rural, 344.
 Water Supplies (Exceptional Shortage Order) Act, 1934, 21.
 Weather, 307-14.
 Wheat, Advisory Committee, 40-4.
 — home production of, 207, 261, 262.
 — imports of, 262, 263.
 — International Agreement, 40-4.

INDEX

- | | |
|---|--|
| Wheat, prices of | Wool, home production of, 291. |
| — subsidy, 191, 200-2. | — imports of, 292. |
| — supplies of, 214. | — prices of, 292-4. |
| — world production of, 43, 44. | — supplies of, 213. |
| Wheat Act, 1932, Statutory Rules
and Orders under, 360, 361. | Yugoslavia, imports from: poultry,
259. |
| Wool exports of 191, 292. | |

