

see how the trust has obtained its hold. The methods adopted here simply follow those that have proved successful in America. There is no novelty in the plan of campaign, although there may have been somewhat more gentleness. Independent traders have been undersold until they have been glad to surrender their businesses at the price offered by the trust to avoid resort to the Bankruptcy Court or the total abandonment of their trade. Special railway rates have been obtained, and the refrigerator-car has been brought into play to deal with the small local butcher.

#### *A Real Preference.*

Perhaps nothing is more sinister than the manner in which the trust firms have been aided by the railways. The greatest centre for landing American cattle in this country is Birkenhead, and the railway rate from Birkenhead to London is £1 5s. per ton. From Birmingham, which is eighty miles nearer, the rate is £1 10s. per ton. It is true that the railways can and do make reply that they are prepared to carry English beef for £1 5s. from Liverpool, and that the American supplies must pay £1 10s. from Birmingham; but it happens that American beef is neither grown nor landed near Birmingham, and that the Cheshire farmer does not grow cattle for meat, probably not ten tons of English meat coming from Birkenhead to London in a year. The American product, then, starts with a very real preference from the railway companies.

Precisely the same tale is told when one turns to Scotland. American cattle are landed at Glasgow; the great centre for Scotch beef is Aberdeen, from which fifty or sixty tons a day come to the metropolis. For the 444 miles from Glasgow to London the charge is £2 5s. per ton, but the Scotch dealer must pay £3 12s. from Aberdeen, which is 523 miles. An equivalent rate from Glasgow would be £3 2s. Here, again, if Scotch beef were grown in the streets of Glasgow it could be sent to London as cheaply as American; but, happening to come from Aberdeenshire, it is heavily penalised.

At Southampton some years ago the London and South-western Railway Company erected fine abattoirs for dealing with a great trade in American cattle. All the refrigerating and other plant necessary for the slaughtering, storing, and preparing meat for market was installed. Southampton, it was thought, would become a great rival to Deptford and Birkenhead, but whoever thinks of the port as a cattle centre to-day? The simple fact is that the London and South-western Railway Company did not accept the trust's terms as to freights to London, and so American cattle were not landed. Had a preferential rate been offered a very different tale would have to be told.

#### *Crushing the Butcher.*

What is known in the United States as the route-car system was utilised early in the trust's operations here to conquer the provinces. Cars, with their loads of meats, were sent to the different centres, and buyers were invited to attend with their carts at the goods-yards and to purchase from the cars. The trust had no cost of shops or depots, and it undertook none of the local distribution. That system, however, had to be given up in face of the protests the local traders made to the railway companies, and another means of developing trade had to be found. The trust has never lacked resource in such circumstances. Local depots were opened, generally not far from the shops of the largest salesmen, and a steady policy of price-cutting and underselling, backed by enormous capital, soon drove the local man under. There are several instances in which once independent tradesmen are still selling from their old shops, with their own names over the doors, but are selling trust meats upon commission, the ownership of the business having passed to one or another of the American houses.

Never for a moment has the local butcher a chance against the trust once this gets a footing. Unless he comes to terms it is only a matter of time before he begins to feel the pinch. The trust can flood the market with beef or it can withhold it. It can fix its own price, and when that price is quoted the local man must pay. The sale of home cattle is so much a matter of uncertainty as to supply, because of the lack of organization, that the butcher cannot depend upon it, and he is driven sooner or later to deal with the trust. When he does so there is only one price at which he must take or leave the meat, and if he shows independence he may find himself in a position in which all the firms in the trust will refuse to supply him, and then he may drop out of the business.

#### *Shortened Supplies of Home-grown Meat.*

What has been said about the lack of organization of the home grower of meat and the consequent domination of a combination that, when all is said and done, is only providing about 40 per cent. of the total consumption of beef, is strengthened by the returns of the Board of Agriculture. These show that the home supplies of animals are steadily diminishing. The following tables are instructive:—

Number of Fat Cattle returned as entering the Markets at the Places in England scheduled under "The Markets and Fairs Act, 1891."

|      |    |    |    |           |      |    |    |    |         |
|------|----|----|----|-----------|------|----|----|----|---------|
| 1902 | .. | .. | .. | 1,010,115 | 1905 | .. | .. | .. | 892,617 |
| 1903 | .. | .. | .. | 997,147   | 1906 | .. | .. | .. | 790,345 |
| 1904 | .. | .. | .. | 904,657   |      |    |    |    |         |

Number of Cattle imported into Great Britain from Ireland.

|      |    |    |    |    | Fat.    | Store.  | Total.  |
|------|----|----|----|----|---------|---------|---------|
| 1902 | .. | .. | .. | .. | 306,892 | 556,554 | 883,446 |
| 1903 | .. | .. | .. | .. | 246,887 | 556,506 | 813,393 |
| 1904 | .. | .. | .. | .. | 232,186 | 470,361 | 702,547 |
| 1905 | .. | .. | .. | .. | 224,943 | 455,667 | 680,610 |
| 1906 | .. | .. | .. | .. | 240,566 | 473,425 | 713,991 |