Meat - Marketing

BUTCHERS AND THEIR CUSTOMERS

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UNIVERSITY OF NEWCASTLE UPON TYNE

DEPARTMENT OF AGRICULTURAL MARKETING

REPORT No 1 APRIL 1965 15s.

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A Study of Meat Retailing in Five Cities

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Acknowledgments

The authors wish to record their thanks in particular to the many Butchers without whose co-operation this report could never have been written. They submitted to detailed questioning willingly, usually without prior notice and often when they were very busy. The generous financial sponsorship of F.M.C. (Meat) Limited and the Agricultural Market Development Executive Committee must also be recognised. Finally, gratitude is expressed to the computing and clerical staff for the efficient way in which they handled a mass of data.

The following members of the research team were responsible for much of the data collection and for a number of valuable suggestions :

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Contents

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INTRODUCTION

This is the first of a series of interim reports, which will be published, dealing with the five year programme of research undertaken by the University of Newcastle upon Tyne into meat marketing, sponsored by F.M.C. (Meat) Limited and the Agricultural Market Development Executive Committee. The insert pamphlet explains the general objectives and the proposed sequence of the investigation.

In brief, it is proposed to indicate how beef of those types most acceptable to the mass market can best be produced by the farmer and distributed to the consumer. Relative acceptability of different types of beef is taken as a logical starting point for the whole programme of work. The research is regarded as national in scope, but an investigation that would produce results truly representative of all consumers in the United Kingdom could not be undertaken. Instead, in order to obtain results applicable to a large section of the population and to areas of rapid development in both consumer tastes and retail practice, it was decided to centre as much of the investigation as possible upon five large cities; Birmingham, Glasgow, Liverpool, London and Newcastle upon Tyne.

As a preliminary to testing actual consumer reaction to different types of beef certain background information was required. In particular there was needed, first, an appraisal of the importance of different criteria by which consumers judge beef quality; such are leanness, tenderness, colour, marbling and flavour. Secondly, there was required some estimate of the quality of existing supplies of beef to consumers who would later be asked for their opinion on selected types.

At the end of 1963 and the beginning of 1964 the Department of Agricultural Marketing of the University made a survey of retail butchers in those five cities. This is the basis of the following description and discussion of butchers' buying, cutting, and selling practices and of their views about their customers' demands and preferences for beef. When the work on consumer acceptance is complete it should be possible to synthesize the information collected from both sides of the counter to show how far the housewife is obtaining what she requires, and to point towards any changes which might be necessary to bring supplies of beef of various qualities more closely into alignment with consumer demand. This report, however, is confined to the butchers' viewpoint.

CHAPTER I

THE SAMPLE AND INVESTIGATIONAL METHOD

THE SAMPLE :

The survey was by interview and each butcher was asked to relate his replies, as far as possible, to the shop selected. Inevitably, some drew on wider experience, but, in the main, the results can be taken as applying to randomly selected samples of retail shops in the five cities. Sampling in each city was stratified by " specialist " butchers' shops, counter service meat departments of co-operative societies, and supermarkets, in proportion to estimates of their share of total retail meat sales in the United Kingdom. For sampling purposes, no distinction was made between branches of multiple stores and sole traders. The specialist group, therefore, represents all private or company owned retail establishments selling meat other than by self service. Sole traders comprised 67%, local chains 32% and national chains 1% of the total sample of specialist establishments.

Sample selection was randomised from lists of retail outlets within the main postal boundaries of each of the four provincial cities and in 14 postal districts in London, chosen to give a wide range of income areas. In the provinces, classified telephone directories furnished the lists of specialist butchers and in London Kelly's directory was used. Lists of co-operative meat departments were supplied by local societies and of supermarkets were obtained from trade annuals. The resulting sample, which included some substitutions for non-respondents among the original random selection of shops is given below :

	Birmingham	Glasgow	Liverpool	London	Newcastle	Total	Per cent
Specialists	71	68	73	96	71	379	85
Co-operatives	9	9	9	11	9	47	10
Supermarkets	4	4	4	6	4	22	5
All Shops	84	81	86	113	84	448	100

Most questions on which the tabular material in this report is based were answered by the majority of the butchers in the sample. Only, therefore, when Tables giving percentages have been derived from appreciably less than maximum possible response have numbers of butchers been stated.

The sample proportion was 10% of the listed Birmingham butchers, 31% of those in the selected London lists and 37% of those listed for Newcastle. If related to the number of butchers' shops reported in the 1961 Census of Distribution the proportion sampled was lower, but at the lowest in Birmingham was nine per cent.

Shops which bought less than about 300 lbs. of home produced beef per week, whether because of size of business or through emphasis of imported beef in their sales, were excluded from the sample. The following tables give average purchases of beef and numbers of shops buying different quantities :

TABLE 1 (*a*). **Average weights of Carcase Beef purchased per week (lbs.)**

	Birmingham	Glasgow	Liverpool	London	Newcastle
Specialists	1,072	1,453	862	1,526	1,137
Co-operatives	686	718	458	540	666
Supermarkets	1,322	1,788	838	1,420	1,150
All Shops	1,042	1,387	818	1,418	1,086

TABLE 1 (*b*). **Numbers of shops buying different quantities of Beef per week**

Amount Bought	No.	%	No.	%	No.	%	No.	%	No.	%
300— 600 lbs.	28	34	16	20	39	47	26	25	29	35
601— 900 lbs.	17	21	16	20	18	21	26	25	21	25
901—1,200 lbs.	14	17	19	24	13	15	16	15	12	15
1,201—1,500 lbs.	7	9	8	10	6	7	9	8	6	7
1,501—2,000 lbs.	9	11	8	10	5	6	10	9	9	11
Over 2,000 lbs.	6	8	13	16	3	4	19	18	6	7
All Shops	81	100	80	100	84	100	106	100	83	100

The sample was not stratified by income areas, but provision was made for sorting results according to whether shops were situated in low or medium and high income districts. The following table gives the breakdown of the sample according to this characteristic.

TABLE 2. **Income area location of Sample Shops**

	Birmingham		Glasgow		Liverpool		London		Newcastle		Total	
	High & Med.	Low	High & Med.	Low	High & Med.	Low	High & Med.	Low	High & Med.	Low	High & Med.	Low
	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.
Specialists	44	27	44	24	42	31	72	24	44	27	246	133
Co-operatives	7	2	3	6	8	1	9	2	3	6	30	17
Supermarkets	4	—	3	1	4	—	6	—	4	—	21	1
All Shops	55	29	50	31	54	32	87	26	51	33	297	151

METHOD :

Standard questionnaires were used and, where necessary, additional questions asked to obtain answers under four main headings.

(1) *Procurement*. This included quantity of beef bought, origin of supplies, whether obtained as sides or in primary wholesale cuts, weight, age and degree of finish of sides procured.

(2) *Cutting practice.* Because retail cutting can vary so much between areas and between individual shops it was vitally important to identify, as precisely as possible, each cut to which butchers referred. They were invited, therefore, to show on blank diagrams how they broke down a side of beef into cuts which were either differentially priced or sold for separate culinary purposes. Without such delineation, much of the information supplied on preference, prices and so on could not have been interpreted.

(3) *Consumer requirements.* These were directly examined in three ways. First the butcher was asked the different culinary purposes for which he sold each cut. Secondly, his opinion was obtained about consumer attitudes to leanness, flavour, tenderness, marbling and other characteristics. Finally, he was asked to list in order of popularity the various cuts for roasting and for frying or grilling.

(4) *Pricing.* Price differentials may to some extent reflect consumer preference, and are of interest in themselves. Butchers were therefore asked to give prices charged for different parts of the carcase in a particular week. At the same time, cuts, if any, which were either difficult to maintain in constant supply or hard to sell, were identified. In addition, an attempt was made to discover how and to what extent customers exercised choice in making their beef purchases.

Apart from those questions dealing with quantities bought and origin of supplies, the investigation was concerned only with home produced beef. Nevertheless, much of the analysis and discussion of consumer preference applies with equal force to imported beef.

CHAPTER II

CONSUMER REQUIREMENTS

There are many criteria by which, either when buying or on eating, consumers may judge the quality of beef. Other workers have examined consumer preference for several, notably colour both of fat and lean, amount of covering or intramuscular fat, texture of fat and lean, juiciness, tenderness and flavour. The objectives of this research, however, suggested a less detailed approach, limiting attention to characteristics likely to be universally comprehended, which could be easily measured or identified, and which might be of overriding importance to eating satisfaction.

Thus, given a simple assessment of what beef the consumer likes, it should be possible, without recourse to chemical tests for example, to identify carcases and live animals from which such beef can be economically obtained. Though beyond the scope of this research, it is nevertheless impossible to over-estimate the importance of application of physical sciences to meat research. In this work, however, attention was focussed on overall fatness, tenderness and flavour, though butchers could mention other characteristics of quality. Both the experience of the survey and the results appear to justify this selection of criteria, with the possible addition of colour.

LEANNESS, TENDERNESS AND FLAVOUR :

Butchers held very strong opinions on their customers' requirements with regard to leanness and tenderness. A considerable majority insisted that very lean and very tender beef was required. Indeed, one in twenty was recorded as saying that most customers wanted no fat at all, even though this was not an answer offered by the structure of the questionnaire (Table 3). Their views were more conflicting on consumers' attitudes to flavour. While there was no significant difference between cities in opinion on leanness or tenderness, 78% of the Newcastle butchers considered that their customers liked a full or strong beef flavour, against 53% in Glasgow, 47% in London, 46% in Liverpool and 38% in Birmingham. Not surprisingly the proportion of butchers in Newcastle who thought flavour was of no importance (10%) was far lower than elsewhere.

TABLE 3. **Number and proportion of Butchers in all cities stating majority customer preference for different degrees of Fatness, Flavour and Tenderness**

FATNESS				FLAVOUR						TENDERNESS			
Medium		Little or None		Full		Mild		No Importance		Reasonably		Very	
No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
29	7	399	93	202	51	95	24	102	25	88	20	345	80

Inevitably butchers' assessments of degrees of tenderness and flavour must be qualitative and in consequence their opinions subjective on their customers' preference in terms of these criteria. Some indication of what was meant by little fat may, however, be obtained from their trimming practices. Rib roasts were most commonly trimmed, if necessary, to ¼″ of overlying fat; from 40 to 60% of the butchers in each city leaving this thickness. Again, the same thickness of fat was most frequently mentioned as being left on Rump steaks. Table 4 gives the general trimming practice of all butchers in each of the five cities.

TABLE 4. **Proportions of butchers leaving different thicknesses of fat on Rib Roasts and Rump Steaks**

Thickness of fat	Birmingham %	Glasgow %	Liverpool %	London %	Newcastle %
RIB ROASTS					
None	12	4	7	4	3
Up to ⅛ in.	12	30	26	25	15
¼ in.	56	48	52	40	58
⅜ in.	7	4	4	11	5
½ in.	9	14	9	19	19
More than ½ in.	4	—	2	1	—
RUMP STEAKS					
None	9	16	11	5	—
Up to ⅛ in.	14	43	23	28	16
¼ in.	42	32	49	37	52
⅜ in.	6	3	5	6	3
½ in.	25	6	12	23	25
More than ½ in.	4	—	—	1	4

Not only were butchers quite clear in their opinion that very lean and tender meat was required, but it is also apparent from Table 5 that, in relation to tenderness at least, they were thinking of an overwhelming majority of their customers. A second reason for asking the question on which this table is based was that its more factual approach might substantiate the results given in Table 3.

TABLE 5. **Proportion of butchers' customers stated to have indicated certain preferences**

Preference	Birmingham %	Glasgow %	Liverpool %	London %	Newcastle %
Lean Meat	89	91	88	87	89
Some Fat	6	8	7	6	9
Good Flavour	15	23	17	18	26
Marbling	1	2	1	4	—
Well Hung Meat	4	7	1	3	5

Whether leanness or tenderness was the most important or an overriding consideration by which butchers believed their customers judged the quality of their beef may not have been satisfactorily resolved by this survey. Retailers clearly considered that they could not sell fat beef. Tenderness, however, could not be gauged by an appreciable number of consumers before eating. Nor would many butchers be invariably certain that they were supplying tender meat. In these circumstances the results in Table 6, which show that leanness was most often given as the primary quality consideration, may not mean that this applied to their customers when they eat the beef, so much as when it was bought. The fact that from 6% of the butchers in Birmingham to 27% in London (Table 6(*b*)) made flavour of either primary or secondary importance to their customers' estimates of quality should serve as some warning to anyone who would like to disregard this characteristic when attempting to write specifications or planning merchandising.

TABLE 6 (*a*). **Numbers of butchers stating leanness, tenderness or flavour as first, second or third importance in customers' estimates of quality**

	Birmingham			Glasgow			Liverpool			London			Newcastle		
	1st No.	2nd No.	3rd No.	1st No.	2nd No.	3rd No.	1st No.	2nd No.	3rd No.	1st No.	2nd No.	3rd No.	1st No.	2nd No.	3rd No.
Leanness	57	18	4	55	15	9	43	27	7	54	38	10	46	18	7
Tenderness	21	57	1	18	58	3	34	41	2	44	54	5	24	46	1
Flavour	1	4	73	6	6	66	3	8	67	12	11	80	3	8	60

TABLE 6 (*b*). **Proportions of butchers stating leanness, tenderness or flavour as of first or second importance in customers' estimates of quality**

	1st %	2nd %	1st %	2nd %	1st %	2nd %	1st %	2nd %	1st %	2nd %
Leanness	72	23	69	19	55	34	49	35	63	25
Tenderness	27	72	23	73	42	51	40	49	33	63
Flavour	1	5	8	8	3	15	11	16	4	12

To some extent, the problem of distinguishing between criteria used in judging the quality of beef when eating and when buying was overcome by asking butchers what attributes their customers had mentioned whenever they had found their beef particularly enjoyable. The limitation of this procedure was obviously that by no means all customers would inform their butcher when they had enjoyed his beef. Probably less than 30% of the customers had expressed their views in this way. Table 7 shows that well over half the retailers remembered less than 21% of their customers remarking on good eating characteristics of beef which they had bought. This need not, of course, mean that all or even a large proportion of those who failed to congratulate their butcher had not enjoyed his beef. Indeed, some butchers regarded asking their customers' opinions of previous purchases as bad salesmanship.

TABLE 7. **Proportions of butchers stating different percentages of their customers who had remarked on good characteristics of beef bought**

	Percentages of Customers Remarking				
	0-20	21-40	41-60	61-80	81-100
Proportion of Butchers	60	14	15	8	3

Table 8 must be read with the foregoing limitations in mind, which may suggest to some that it is likely to reflect the views more of connoisseurs than of the mass of consumers. To obtain these results butchers were not restricted to any particular set of qualitative characteristics, nor were they asked to place them in order of importance. The figures in the table should therefore represent those of all characteristics which consumers most often mentioned when they had enjoyed a roast or a steak in the order in which they were remembered by the butchers.

The relegation of leanness to the place of third importance as a characteristic of quality supports the earlier suggestion that this is considered when buying rather than on eating. The much greater importance of flavour when judged on eating is a natural corollary, but underlines the preceding contention that there is no evidence from this investigation that it can be discounted in merchandising beef. There can be no doubt that tenderness and leanness are very important indeed, but how far consumers are concerned with flavour is by no means certain.

TABLE 8 (*a*). **Proportions of all butchers stating different characteristics of quality mentioned by customers expressing approval of beef.**

	Tenderness	Flavour	Leanness
	%	%	%
Roasts	95	51	13
Frying and Grilling Steaks	97	51	11

TABLE 8 (*b*). **Proportions of butchers stating, first or second, different characteristics of quality mentioned by customers**

	Stated		Stated		Stated	
	1st	2nd	1st	2nd	1st	2nd
	%	%	%	%	%	%
Roasts	81	24	16	59	3	17
Frying and Grilling Steaks	84	23	14	64	2	13

PREFERENCE FOR PARTICULAR CUTS :

Butchers obtained both roasts and frying or grilling steaks from numerous parts of the carcase. There could, therefore, be a considerable range of cuts over which consumers might exercise choice. It is, however, evident that most of the butchers' customers did not know the name, the anatomical origin or the special characteristics of more than a few of the cuts available. They were probably further confused by the established butchering practice of selling several cuts for two or more distinct culinary uses. This sometimes meant that the whole of a cut was offered for alternative uses, at others that part was sold to be cooked one way and the remainder another. For example, any of the Topside might go for either roasting or frying, while the first slice or two of the Thick Flank could be to fry and the remainder to roast or stew. Sometimes cuts were sold for frying which many would consider roasts, or for roasting which would more usually be braised or stewed. Butchers, with a demand for low priced frying steak, might feel forced to offer cuts which the high class trade would regard as unsuitable for the purpose, or they might suggest that such meat should be braised with little expectation of their advice being accepted. Table 9 should, therefore, be interpreted as giving a picture of the uses to which butchers believed that the different cuts were put, usually, but not always at their instigation.

In order to show as precisely as possible, the uses to which different cuts were put, the table is presented separately for each city with the cuts listed according to local nomenclature. Some cuts named differently between cities are the same. Nevertheless, sometimes local cutting practices will also vary even for parts with names common to different areas. For a diagrammatic description of each cut and its predominant local name the reader is referred to Appendix I.

Certain striking differences between cities are apparent, for example, the wider variety of use of the hindquarter in Glasgow than elsewhere and of the forequarter in London. It was found impracticable to distinguish satisfactorily between roasts and pot roasts. With the exception of Fore Chine or Standing Ribs, however, forequarter roasts would usually be cooked with added water, but sometimes, as for example with Brisket, either method of cookery might be used. The further traditional use of this joint for pickling, not shown in the table, was recorded in several instances.

TABLE 9. **Proportions of butchers stating different culinary uses for particular cuts.**

Use / Cut	Roast %	Fry or Grill %	Stew or Mince %	Roast or Fry %	Roast, Stew or Mince %	Fry, Stew or Mince %	All Uses %
BIRMINGHAM							
Hindquarter							
Topside	75	—	—	23	2	—	—
Silverside	80	—	—	19	1	—	—
Rump Cuts	82	13	—	5	—	—	—
Bed	37	—	2	59	2	—	—
Sirloin	35	—	—	65	—	—	—
Fillet	2	96	—	2	—	—	—
Rump Steak	—	84	—	16	—	—	—
Hipbone Steak	10	66	—	24	—	—	—
Flank	5	—	88	—	7	—	—
Forequarter							
Flat Ribs	62	—	16	—	20	2	—
Chine	56	—	—	42	2	—	—
Plate	43	—	11	—	44	2	—
Brisket	40	—	18	—	42	—	—
Shoulder	6	9	13	41	4	25	2
Chuck	2	11	19	17	2	35	14
Shin	—	—	98	—	—	2	—
Neck	—	—	100	—	—	—	—
Sticking	2	—	98	—	—	—	—
GLASGOW							
Hindquarter							
Sirloin	13	6	1	80	—	—	—
Rump	9	—	9	9	59	4	10
Thick Flank	5	—	16	12	54	3	10
Fillet	3	94	2	1	—	—	—
Popes Eyes	—	93	—	7	—	—	—
Thin Flank	2	—	98	—	—	—	—
Hough	—	—	100	—	—	—	—
Forequarter							
Brisket	19	—	38	—	43	—	—
Ribs	17	17	—	66	—	—	—
Shoulder	—	—	99	—	—	1	—
Gullet and Runner	—	—	100	—	—	—	—
Neck	—	—	100	—	—	—	—
Hough	—	—	98	—	—	—	2
LIVERPOOL							
Hindquarter							
Topside	43	1	1	49	1	—	4
Silverside	41	2	6	42	2	3	4
Rump Cuts (Shellbone)	44	—	2	47	2	2	3
Sirloin	68	—	—	31	1	—	—
Thick Flank	17	23	8	40	6	—	6
Fillet	1	92	—	6	—	1	—
Rump Steak	3	76	—	16	—	4	1
Thin Flank	5	88	—	—	5	2	—
Shin	—	—	96	—	—	2	2

Use / Cut	Roast %	Fry or Grill %	Stew or Mince %	Roast or Fry %	Roast, Stew or Mince %	Fry, Stew or Mince %	All Uses %
LIVERPOOL							
Forequarter							
Standing Ribs	73	—	—	24	3	—	—
Thin Flat Ribs	41	—	41	—	18	—	—
Plate	37	—	10	—	53	—	—
Brisket	36	—	14	—	50	—	—
Thick Flat Ribs	18	11	28	18	11	9	5
Chuck	1	—	53	3	1	36	6
Neck	—	—	100	—	—	—	—
Vein Piece	—	—	100	—	—	—	—
Shin	—	—	96	—	2	1	1
LONDON							
Hindquarter							
Topside	72	—	—	21	6	—	1
Silverside	76	—	1	12	10	—	1
Rump Cuts	75	5	—	16	4	—	—
Tail of Rump	62	4	17	—	13	2	2
Thick Flank	45	10	1	28	5	11	—
Sirloin	43	4	—	51	—	2	—
Fillet	—	93	—	7	—	—	—
Rump Steak	2	87	—	10	—	1	—
Thin Flank	16	—	68	—	16	—	—
Leg	1	—	99	—	—	—	—
Forequarter							
Fore Ribs	96	—	—	1	—	1	2
Flat Ribs	80	—	11	1	6	—	2
Back Ribs	41	3	30	3	10	10	3
Jacobs Ladder	62	1	14	—	17	3	3
Brisket	53	—	29	—	18	—	—
Plate	41	—	35	—	24	—	—
Leg o'Mutton	26	—	48	—	15	9	2
Chuck	1	1	79	—	7	11	1
Blade	1	1	79	—	6	12	1
Clod	—	—	100	—	—	—	—
Sticking	—	—	100	—	—	—	—
Shin	—	—	100	—	—	—	—
NEWCASTLE							
Hindquarter							
Topside	72	—	—	27	1	—	—
Silverside	76	—	—	22	2	—	—
Rump Cuts	67	2	—	26	2	3	—
Sirloin	63	—	2	35	—	—	—
Thick Flank	8	—	89	3	—	—	—
Fillet	—	95	—	5	—	—	—
Rump Steak	—	71	—	27	—	2	—
Thin Flank	8	—	89	3	—	—	—
Shin	—	—	100	—	—	—	—
Forequarter							
Fore Ribs (Chine)	82	—	—	18	—	—	—
Brisket	75	—	17	2	6	—	—
Plate	68	—	24	—	8	—	—
Thin Ribs (Flat Ribs)	54	—	40	—	6	—	—
Thick Ribs (Shoulder)	48	2	27	15	2	4	2
Chuck	3	—	84	2	2	8	2
Neck	—	—	100	—	—	—	—
Sloat (Sticking Piece)	—	—	100	—	—	—	—
Shin	—	—	100	—	—	—	—

The problem of assessing consumer acceptance of different cuts, when only a few were aware of the many possibilities, is illustrated by Table 10. Thus, barely more than half the butchers' customers, and in several instances considerably less, specified a roast, a steak or stewing beef by name. Even those who did specify named a very limited number of cuts, and in doing so were not always fully aware of what they required. For example, some butchers explained that many would name a high priced cut who were really shopping for lower quality meat.

There is, however, a more significant inference which might be drawn from Table 10 and from supporting comments of the butchers who were interviewed. If, as was generally held, consumers are becoming less familiar with the attributes of different cuts and, in consequence, decreasing numbers state their requirements by reference to particular cuts, it may well be argued that, in the future, beef should be sold as first, second or third quality and according to its culinary use, rather than under the traditional nomenclature for different cuts.

TABLE 10. **Proportions of butchers' customers stated to ask for Beef by name of cut**

Use	Birmingham %	Glasgow %	Liverpool %	London %	Newcastle %	All Cities %
Roasting	36	56	51	34	38	42
Frying	37	58	36	58	30	47
Stewing	28	62	28	19	18	31

In the event, when butchers were asked which, in order, were the roasting joints and frying or grilling steaks most preferred by their customers, they inevitably answered on the basis of impression rather than any expressions of demand voiced by their customers. More important, it was not possible to distinguish between preference shown independently of price and that influenced by price differentials between cuts.

Among roasts, Topside or Silverside was given by from 30 to 80% of the butchers in each city as the most preferred joint. Only in Liverpool did less than half the butchers consider these the most popular roasting cuts. Butchers' assessment of preference did not, in practice, range much further than comparison of these two cuts with Sirloin, which was given by from 20 to 50% of the butchers in each centre as second in popularity and by 48% of the Liverpool butchers as the first choice. From a quarter to a third of the butchers gave Fore Ribs as the third most preferred roast. Brisket was the only other joint of any significance and was given by 13% of both the Glasgow and Newcastle butchers as third in popularity.

In each city from 40 to 60% of the butchers gave Fillet as the most popular frying or grilling steak, while from 30 to 40% cited Rump as the first choice. Usually, where Fillet was given first place Rump was second and vice versa. In Glasgow only, Sirloin featured as a second choice, given by 31% of the butchers. A number of lesser known cuts, notably Thick Flank and Rump Cuts, were made third choices, particularly in Birmingham, Liverpool and Newcastle.

WEIGHT OF ROASTING JOINTS :

The figures in Table 11 illustrate the generally recognised trend towards smaller roasting joints. No explanation can be offered of the rather marked differences between cities. Nor, since the supermarket sample was included only to give proportional representation of different retail outlets, was it large enough to afford valid comparisons with specialist retailers. The separate results, however, in all cities except Liverpool showed the supermarkets to be selling slightly smaller joints than the specialists.

TABLE 11. **Proportion of butchers stating majority of their customers wanted Roasts of different weights**

Average Weight	Birmingham	Glasgow	Liverpool	London	Newcastle	All Cities
	%	%	%	%	%	%
Under 2 lbs.	47	25	7	13	41	26
2—3 lbs.	49	56	75	74	54	62
3 lbs. and over	4	19	18	13	5	12

The extent to which these requirements affected butchers' procurement policy is discussed in the next chapter.

TRENDS IN DEMAND FOR ROASTS, STEAKS, STEW AND MINCE :

A question was included with the object of checking the generally accepted view that proportionately more steaks and mince and fewer roasts are sold now than five years ago. Butchers had some difficulty in understanding the question, tending to confuse absolute and relative quantities. The analysis perhaps confirms the popular impression without allowing conclusions to be drawn about the importance or the extent of the change. Few butchers were recorded as saying that proportionately more of the carcase was sold now for roasting than five years ago, but despite a much higher number who considered that proportionately less beef now went for this purpose, surprisingly many thought there had been no change. Indeed, these answers do not correlate with those for frying steaks, stewing meat and mince. From a third to half the butchers in each of the five cities confidently stated that relatively more of the carcase was now sold for frying and only slightly fewer held that the same was true for mince. Again, high proportions of butchers, over 80% in Liverpool for example, recorded no change for stewing beef. Probably more confidence can be placed in the estimates of more steaks and mince than in the results for either stewing beef or roasts. Perhaps one might also infer from the somewhat inconclusive answers that the rate of change in culinary use is not great.

CHOICE :

Recognition by butchers of indications of consumer preference implies that their customers can make their requirements known. In other words, it must mean that in one way or another consumers did to some extent exercise choice in the specialist shops which made up the greater part of the sample. They may do so, however, without necessarily personally making a selection each time they buy. Between the latter possibility and absolute reliance on the butcher's judgment, which still allows the customer to change to another shop if she is not satisfied, there are a number of ways in which she can exercise choice. In shops, and there were several in the sample, where joints were displayed with weight and price labels, a partial selection could be made by either the butcher or his customer and the final decision left to the other party. In any other shop, somewhat the same situation may obtain, or customers may specify certain characteristics and leave the rest to the butcher. Again, even when butchers make the selection themselves, they will often act on preferences expressed some time in the past. Even when a customer has never voiced her requirements, many butchers will clearly have formed an impression of what these may be. It would be very difficult to disprove the specialist retailers' claim that personal service of this kind is important in promoting consumer satisfaction. There is no doubt that in very many specialist shops this service is well given. The question at issue is whether it would still be required if more standardised qualities or types of beef could be offered.

Table 12 shows that a very large proportion of customers leave the choice of their meat to the butcher. This may in part follow from traditional display procedure; where modern displays were the rule more customers made their own choice. It does not, however, follow that consumers are necessarily unwise to depend on their butchers' judgment to select their beef purchases from the existing range of types, nor that, by doing so, they necessarily abrogated all exercise of personal choice.

The lower proportion of customers who depend on their butchers' judgment in Glasgow than elsewhere is striking. Perhaps too much should not be read into the figures, but in early tests of consumer preference in this city, a relatively high degree of discrimination was in evidence.

TABLE 12. **Proportions of butchers stating different percentages of their customers leave choice of Beef to the butcher**

Percentages of Customers	Birmingham	Glasgow	Liverpool	London	Newcastle
	Proportion of Butchers %				
0	4	1	—	5	—
1—25	8	21	8	11	10
26—50	23	36	18	17	25
51—75	26	14	23	13	15
76—99	35	24	35	47	45
100	4	4	16	7	5

The considerable proportion of consumers which the table shows leave the choice to their butcher may serve as a final reminder that indications of preference discussed in this chapter are such only as emerge from butchers' opinions. Assessment of consumer choice is very far from being an exact scientific exercise. For this reason it is logical to approach the subject from several standpoints to seek confirmation or the reverse for conclusions, which, on the basis of one method of investigation, would carry less weight. When the work, already being undertaken, of obtaining consumer opinions on different types of beef is complete, therefore, the results obtained will gain in significance where they are found to agree with the indications of this report.

CHAPTER III

PROCUREMENT

Butchers' buying practices will, of course, be influenced by assessment, not only of their customers' preferences, but also of probable retail yield from saleable meat, and by the overriding consideration of price. Moreover, selection can only be made from existing supplies. A close relationship, therefore, between the type of beef procured and retailers' stated views of consumer requirements need not be expected. Any survey investigation into how well procurement matches consumer requirements is further complicated by the difficulty of defining precisely the different types of beef bought into the shops and by the possibility of transforming its eating quality by subsequent treatment, whether judicious hanging or trimming. No enquiry such as this, however, would be complete without some consideration of supplies. Moreover, even though very generalised criteria had to be used to define carcase types, certain loose relationships between the meat butchers believe their customers want and that which they procure can be distinguished.

Home Produced or Imported :

Despite the fact that many shops which sold a high proportion of imported beef were automatically excluded from the sample, a considerable proportion of those included by the investigation sold appreciable quantities from these sources. Of the total sample of shops in all five cities, 40% sold some foreign or Commonwealth beef. There was however, considerable variation in the importance of home produced beef in sales from the sample shops in different cities. On average, taking a year's trading as a basis, the Birmingham butchers estimated that 14% of the beef they procured was imported, those in Glasgow 3%, Liverpool 25%, London 31% and in Newcastle 13%. There was also a tendency, though by no means marked, for the butchers visited in low income areas to buy proportionately more overseas beef than those in other districts.

Table 13. **Average proportions of supplies bought as imported Beef according to Income Area location of shops**

Birmingham		Glasgow		Liverpool		London		Newcastle	
High & Medium	Low	High & Medium	Low	High & Medium	Low	High & Medium	Low	High & Medium	Low
%	%	%	%	%	%	%	%	%	%
12	19	1	6	22	24	28	35	10	18

Only 41 of the 166 butchers who sold imported beef could distinguish the type of customer by whom it was preferred. Of these all but three associated this preference with those consumers who had relatively less than others to spend per head of their families on meat.

Table 14 shows, as might be expected, a wide range in the relative quantities of imported beef bought by individual butchers.

TABLE 14. **Proportions of butchers buying different percentages of total supplies as Imported Beef**

Imported Beef bought %	0	1-25	26-50	51-75	76-100
Butchers %	60	15	17	4	4

No attempt was made to distinguish between frozen and chilled beef nor the uses to which this was put. The failure, noted above, to distinguish the type of customer with a preference for imported beef is not, therefore, surprising. If, as is likely, much of this beef was used to augment supplies for mince or stewing there would be less reason for consumers to differentiate than if it were sold as roasts or for frying. South America was, of course, far most often mentioned as the source of imported beef, Yugoslavia was frequently reported, but Eire, New Zealand, Australia and South Africa were only occasionally recorded.

WEIGHT, AGE AND FINISH :

Butchers' estimates of the most usual weight of side bought ranged almost completely over the carcase weights at present in supply. Taking all cities together one third of the butchers gave weights between 291 and 310 lbs. as their most frequent purchases. There is evidence in Table 15 that more butchers in Birmingham than elsewhere bought the heavier carcases, but there is no clear difference between the weights of sides purchased in other cities.

TABLE 15. **Proportions of butchers stating different weights of Sides usually purchased**

Weight of Side	Birmingham %	Glasgow %	Liverpool %	London %	Newcastle %	All Cities %
Under 270 lbs.	20	34	44	34	35	34
271—310 lbs.	48	50	40	44	53	47
311—350 lbs.	25	11	15	17	11	16
Over 350 lbs.	7	5	1	5	1	3

Opinion was about equally divided as to whether any particular maximum weight of side could be identified from which the small joints most in demand could be cut, many butchers claiming that they could obtain joints economically, even of less than 2 lbs., from carcases of any weight. Nevertheless, for joints up to 3 lbs. the average maximum suitable weight of side quoted was in the most commonly purchased range from 271—310 lbs.

A butcher's definition of finish, in terms of deposition of fat, must be to some degree subjective. Nevertheless, it is perhaps surprising, in view of the overwhelming importance attached to leanness, that more described their purchases as of medium than light finish. There are, of course, numerous possible explanations. Wasted fat might be compensated by lower priced carcases; better conformation may outweigh disadvantages of high finish; quality, associated by many with a fair degree of fat covering, may be desired and the fat trimmed; or lighter finished supplies may not have been available. Only 18 butchers gave a heavily finished carcase as their usual purchase. Several of these supported the statement with estimates of more than average thickness of fat left on Rib roasts and Rump steaks. These butchers, however, represented only 4% of the total reporting. For the vast majority there was no apparent relationship between degree of finish and the general belief that the consumer requires lean meat. Indeed, the Glasgow butchers held very similar views to others regarding the importance of leanness, but Table 16 shows that proportionately considerably more bought sides of medium finish than in other cities.

TABLE 16. **Proportions of butchers buying carcases of different degrees of finish**

	Birmingham	Glasgow	Liverpool	London	Newcastle	All Cities
	%	%	%	%	%	%
Heavy Finish	2	5	3	5	9	4
Medium Finish	49	72	52	60	44	56
Light Finish	49	23	45	35	47	40

Some butchers did not consider it important to know the age of a beast at slaughter if they bought on the hook. Their concern with age was somewhat indirect, since quality was judged mainly by visible characteristics of the carcase, some of which are broadly related to the age of the animal. Most of the butchers who co-operated in this investigation were buying their meat in central markets. Consequently many estimates of age of animal from which carcases were obtained were imprecise, and so are not included in this report. In London 35% of the butchers said they did not know the age of beast from which their beef was obtained, and there were several instances, in all cities, of butchers who, in trying to be co-operative, at first stated an age of beast which could not correspond with the weight of sides bought. In general there appears to have been a tendency to underestimate the age of slaughter. Though this may not be an example of outstanding importance, it nevertheless demonstrates the possible effect of imperfect spread of knowledge between the producer and the retailer. Thus many retail butchers' requirements for beasts, in so far as these are related to age, are only indirectly transmitted to producers.

WHOLESALE CUTS :

Since the sample is heavily weighted by specialist shops, it would not be expected that a large part of the beef was procured in wholesale cuts as opposed to sides. Nevertheless, easy access to central meat markets, where cutting is increasingly practised, means that these butchers had less reason than those in remote districts to restrict the pattern of their sales by the breakdown of whole sides. Shortage of particular categories of beef could be made good at little notice, surpluses of the less popular cuts could be avoided and seasonal fluctuations in demand, for example between stewing or frying steak, could be met by varying the proportions in which different parts of the carcase were procured. Since one objective was to discover how far opportunities of departing from the practice of buying whole sides were accepted, both fores and hinds together with smaller pieces were treated as wholesale cuts, but only to the extent that this allowed variation in proportions of the carcase bought. Thus a butcher who bought equal numbers of fores and hinds was treated as buying sides, while one who bought four fores and five hinds was taken to have procured approximately one ninth of his beef in wholesale cuts.

Table 17(*a*) shows that, except in Newcastle, 40% or less of the butchers were working only with sides. Indeed, it was rare for a butcher to claim the disadvantage, sometimes attributed to specialists, that he bought and disposed of whole bodies and was therefore denied the flexibility which is supposed to be a feature of supermarket meat trading. It is important to recognise, however, that this table refers to both home produced and imported beef. Had it been confined to the former, there would certainly have been a higher proportion of butchers dealing only with whole sides. There are notable differences between cities. The figures for London and Liverpool reflect the well known fact that these markets emphasise cutting and perhaps the greater importance of their supplies of imported beef. Newcastle and Glasgow, with large fatstock auctions and a low demand for overseas supplies had the highest proportion of butchers buying 75% or more of their beef as sides, which, of course, includes live animals.

Table 17(*b*) shows the comparative importance for the samples of butchers for each city of wholesale cuts and sides in total purchases.

TABLE 17 (*a*). **Proportions of butchers buying Beef as Sides and as Wholesale Cuts**

	Birmingham	Glasgow	Liverpool	London	Newcastle
	%	%	%	%	%
Proportion buying 100% as Sides	40	38	23	30	49
„ „ 75—99% „	30	38	23	20	21
„ „ 51—74% „	2	10	13	10	11
50% as cuts and 50% „	9	5	15	11	4
51—74% as cuts	4	6	1	6	3
75—99% „	—	—	3	5	3
100% „	15	3	22	18	9

TABLE 17 (*b*). **Proportions of Beef bought as Sides and Wholesale Cuts**

	Birmingham	Glasgow	Liverpool	London	Newcastle
	%	%	%	%	%
Bought as Sides	77	78	58	60	75
Bought in Wholesale Cuts	23	22	42	40	25

No very clear indication could be obtained of which wholesale cuts were most in demand. Whole fores were more often mentioned than whole hinds, as common purchases, by the butchers in all cities, except Birmingham. Since the survey was undertaken in winter, however, seasonal demand for stewing beef would obviously be uppermost in the butchers' minds, even though they were asked to answer on the basis of a year's trading. At the same time, Table 18 shows that among the smaller cuts, mentioned as regularly procured, those from the hindquarters predominated, and would have provided considerably more roasting and frying beef than there would have been stewing meat obtained from the forequarter cuts. The higher priced beef from the hinds might be expected to be purchased more selectively. The table, though necessarily based on rather small samples for individual cities, gives some indication of the considerable service provided by wholesalers in supplying varied retail requirements. This is particularly notable in London and Liverpool.

TABLE 18. **Numbers of butchers mentioning different Wholesale Cuts as commonly purchased**

	Birmingham No.	Glasgow No.	Liverpool No.	London No.	Newcastle No.	All Cities No.
Fores	11	27	16	28	30	112
Hinds	11	10	10	22	14	67
No. Butchers reporting Fores or Hinds	15	31	19	36	32	133
Hindquarter Cuts:						
Tops	13	22	15	30	10	90
Rumps	3	10	16	30	11	70
Rumps and Loins	2	—	5	7	1	15
Loins	1	—	18	11	7	37
Other	1	—	—	1	1	3
Total Hindquarter Cuts	20	32	54	79	30	215
Forequarter Cuts:						
Briskets	—	—	1	1	4	6
Shins	6	6	3	7	1	23
Ribs	6	—	9	9	—	24
Flat Ribs	—	—	4	—	—	4
Flanks	—	1	—	3	—	4
Crops, etc.	5	—	1	4	—	10
Sundry Stewing Beef	1	—	4	1	—	6
Total Forequarter Cuts	18	7	22	25	5	77
No. Butchers reporting Hind and Forequarter Cuts	36	36	46	65	23	206

CHAPTER IV

CUTTING AND PRICING

In order to interpret much of the information obtained in this investigation and to provide background knowledge against which tests of consumer acceptance could later be undertaken, it was necessary to have some information on butchers' cutting practices and the prices which they charged. Thus, examination of consumer choice between different roasts or steaks presupposed that these could be identified as being in most respects the same cuts in one shop as another. Again, retail prices for each shop afforded some check on various parts of the analysis, both of data relating to procurement and preference. The contents of this chapter, therefore, are in a sense by-products of the main enquiry. It will be obvious that the information on cutting is not intended for those requiring detailed descriptions of how carcases are broken down, since it lacks the precision to be found in text books on meat technology. Again, the price information has little to say about how prices are determined and represents only a record of prices charged in the sample shops in one particular week from which it has been possible to draw a few comparisons. Almost all comparisons of meat prices are notorious for giving rise to invalid inference and faulty conclusions because of the difficulty of ensuring that contrasts are between meat of like quality or between shops offering similar services, or, indeed, between cuts obtained from exactly the same part of the carcase. We have been careful to avoid arguing more from the figures than they can substantiate, and must implore the reader not to attempt any further inference from this data.

CUTTING :

The ways in which the majority of butchers who were interviewed in each city broke down a Side of beef into cuts, together with their common local names are shown in Appendix I. For hindquarters regional differences in cutting were small, being confined to whether Rump Cuts were separated and distinguished or whether they were sold with the Round or as part of the Rump Steak. The latter practice was followed by a substantial minority of butchers in Birmingham; this combination of cuts being called Hipbone Steak in the Midlands. Greater differences were found between methods of breaking down the forequarter. Although the majority of Birmingham, Liverpool and Newcastle butchers cut forequarters in approximately the same way, the tendency in London was to break them down into a greater number of cuts. On the other hand, in Glasgow most butchers distinguished relatively few large forequarter pieces.

Apart from convenience, the main objective of breaking the side down into cuts is to distinguish parts of the carcase which differ considerably in quality and which may, therefore, sell for varying prices, and sometimes different culinary uses. To the extent that this is true, the greater degree of differentiation within the forequarter in London might suggest that it is used there more efficiently than in Glasgow. In practice, however, there are a number of reasons why this need not necessarily be the case, and why too much emphasis should not be placed on the economic significance of any regional differences in cutting. Although they used the same broad basis of cutting, many butchers did not initially break down the forequarter as completely as is shown in the diagrams in Appendix I. This need not mean that they failed to distinguish between each of the smaller forequarter cuts when preparing and pricing retail joints or steaks. On the contrary, a number of butchers who only showed the main cuts on the diagram, nevertheless distinguished between different parts of these cuts, charged more for the better quality ends, and in some cases sold these for different culinary purposes than other parts of the same main cuts. Thus, it was not uncommon for a little more to be charged for the eighth and ninth than for the sixth and seventh Fore Chine Ribs, or for the best end of Thick Flank or Silverside to be sold as frying steak, and the remainder for roasting or even stewing. Again, though Table 19 shows substantial regional and individual variation in the point of division between the fore and hindquarters, this was not necessarily reflected in different pricing policies for cuts which were anatomically the same.

TABLE 19. **Proportions of butchers separating the fore and hindquarters between different pairs of Ribs**

	5—6th	6—7th	7—8th	8—9th	9—10th	10—11th
	%	%	%	%	%	%
Birmingham	—	—	23	42	35	—
Glasgow	10	80	6	1	3	—
Liverpool	—	—	8	20	66	6
London	—	—	—	21	7	72
Newcastle	—	—	7	29	61	3

Although the great majority of butchers in Glasgow separated the foreleg from the hindquarter between the sixth and seventh ribs, their hind cuts, Foreseye or Fore Roast and Two or Three Rib Plate were frequently very similar to the London forequarter cuts, Fore Rib and Flat Rib. Nonetheless, these variations in cutting practices together with the different culinary uses for particular cuts, shown in Table 9, make it clear that, despite an apparently high degree of uniformity in basic regional methods of cutting, there are variations in detail and in the ways in which some cuts are utilised. Far from concluding, therefore, that the forequarter is utilised most efficiently in London and least in Glasgow, it would be more realistic to observe that cutting and methods of utilisation have been well adapted to regional differences in relative popularity of roasts, pot roasts, steaks and stews.

PRICES :

All prices quoted are those prevailing in the first week of November, 1963. Sample average prices in each city, together with the average of the 25% highest and the 25% lowest prices for each cut are given in full in Appendix II. In this chapter comparisons are made only between cuts which are universally identical or at the least very similar. For the sake of simplicity, these have been given the names commonly used in Liverpool, Birmingham and Newcastle. Average prices for comparable cuts in each city are shown in Table 20.

TABLE 20. **Average retail prices per lb. stated by butchers for certain Cuts. November 1963**

	Birmingham		Glasgow		Liverpool		London		Newcastle	
	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.
Hind Leg, Shin or Hough	3	3	3	5	3	1	3	3	3	6
Topside	5	4	5	0	4	7	5	1	5	0
Silverside	5	4	5	0	4	7	4	9	5	0
Rump Cuts (Bone out)	4	10	5	0	4	9	5	2	5	0
Thick Flank or Bed	5	3	4	6	4	2	5	0	—	
Fillet Steak	7	6	7	7	6	7	8	10	7	0
Rump or Hipbone Steak	6	7	6	4	5	8	7	5	5	9
Sirloin (Bone in)	4	3	4	10	4	2	4	7	4	4
Sirloin (Bone out)	5	6	5	10	4	7	5	7	4	11
Fore Chine Ribs (Bone in)	3	7	4	4	3	3	3	4	3	8
Fore Chine Ribs (Bone out)	4	7	5	6	4	0	4	9	4	1
Chuck	4	3	4	2	3	8	4	1	3	10
Brisket (Bone in)	1	10	—		2	2	2	0	—	
Brisket (Bone out)	3	3	4	2	—		2	11	3	4
Fore Leg, Shin or Hough	3	3	3	4	3	1	3	2	3	6

The average price of each cut, with the exception of brisket was lower in Liverpool than in the other cities. Whether this was due to predominantly lower quality beef in that city, to lower wholesale prices or retail margins, or to greater efficiency can not be resolved. Quality certainly does vary between different parts of the country. Indeed, interviewers sometimes felt that they could identify areas where cow beef was more in evidence than in others. Whatever the reason for this particular price difference, it was certainly not greater than could be explained by possible differences in quality.

Differences in the prices for certain individual cuts do, however, appear to reflect contrasts in regional demand. Thus, average prices of the better frying and grilling steaks were high in London, while Sirloin and Fore Chine Ribs were particularly costly in Glasgow, where few other cuts were extensively used for roasting. The differences in the prices of selected cuts are compared in Table 21.

TABLE 21. **Amounts in pence per lb. by which prices in high, medium and mixed income areas exceeded those in low income areas**

	Birmingham	Glasgow	Liverpool	London	Newcastle
Topside	3	2	4	4	—1
Rump Steak	1	5	8	8	—1
Fillet Steak	1	5	10	11	3
Sirloin (Bone out)	3	1	4	5	—2
Chuck	2	4	2	1	—1
Brisket (Bone out)	3	5	—	—1	1
Fore Leg, Shin or Hough	2	1	2	3	1

The table shows that prices in high income areas tend to be above those in the low income districts. Some part of these differences may well reflect different services provided, but equally they could be wholly accounted for by possible differences in quality. Comparisons between high and low income areas of price ratios between high and low quality cuts revealed no significant differences. For example, on average the butchers in low income areas tended to sell Topside at the same percentage premium over Brisket as in high income districts.

Averages can be expected to conceal wide differences in individual prices, but it would be misleading to quote the highest and lowest recorded for different cuts, as these may well reflect very special circumstances or trading policies. Instead, a comparison is offered between the 25% highest and 25% lowest prices recorded for each cut. The resulting differences are shown in Table 22.

TABLE 22. **Differences between averages of twenty-five per cent highest and twenty-five per cent lowest retail prices per lb.**

	Birmingham		Glasgow		Liverpool		London		Newcastle	
	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.
Hind Leg, Shin or Hough		6		7		9		9		7
Topside	1	0	1	3	1	1	1	3		8
Silverside	1	0	1	3	1	2	1	3		8
Rump Cuts (Bone out)	1	5	1	3	1	5	2	6	1	0
Thick Flank or Bed	1	4	3	0	1	7	1	6	1	1
Fillet Steak	1	11	1	11	2	2	2	1	2	0
Rump or Hipbone Steak	1	4	1	11	1	10	2	4	1	2
Sirloin (Bone in)		11	1	6	1	6	1	8	1	2
Sirloin (Bone out)		10	1	8	1	6	1	6	1	2
Fore Chine Ribs (Bone in)		8	1	10	1	8	1	3	1	4
Fore Chine Ribs (Bone out)	1	5	1	11	1	4	1	1	1	7
Chuck		10		11	1	0	1	0		8
Brisket (Bone in)		7		—	1	8		11		—
Fore Leg, Shin or Hough		6		11		9		9		7

At the time this data was collected wholesale prices on Smithfield averaged 2/3d. per lb. for Scotch Killed Sides, and 1/11½d. for English Long Sides. First quality cow beef was selling wholesale for about 1/8d. to 1/9d. per lb. By no means all the price differences in Table 22, therefore, can be explained by possible differences in quality. Indeed, since the vast majority of their prices had been stable for some time, it must be concluded that for a number of butchers there was weak price competition with regard to specific cuts. It does not follow, however, that competition was equally weak if overall beef sales could be taken into account. Clearly, there are possibilities of butchers featuring particular low or high priced cuts. The numbers and proportions of butchers selling selected pairs of cuts at varying price differentials are shown in Appendix III. These emphasise the wide dispersion in prices charged by individual butchers.

TABLE 23. **Proportions of butchers not always able to supply particular cuts**

	Birmingham			Glasgow			Liverpool			London			Newcastle		
	Often	Sometimes	Rarely	Often	Sometimes	Rarely	Often	Sometimes	Rarely	Often	Sometimes	Rarely	Often	Sometimes	Rarely
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Fillet Steak	6	8	8	23	16	9	12	8	5	11	13	13	18	14	13
Rump, Pope's eye or Hipbone Steak	3	1	2	1	—	3	—	3	—	3	—	5	4	5	3
Topside and Silverside	7	4	10	1	1	—	1	3	—	—	2	3	4	11	6
Sirloin	3	1	6	2	—	—	1	8	1	3	5	2	3	6	9
Other Cuts	6	—	6	2	—	2	1	6	1	2	7	2	3	4	4

TABLE 24. **Proportions of butchers unable to dispose of particular cuts at their prevailing market prices**

	Birmingham			Glasgow			Liverpool			London			Newcastle		
	Often	Sometimes	Rarely	Often	Sometimes	Rarely	Often	Sometimes	Rarely	Often	Sometimes	Rarely	Often	Sometimes	Rarely
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Topside and Silverside	12	16	10	—	—	—	4	—	1	2	3	2	—	2	6
Sirloin	—	3	2	1	—	—	—	3	—	—	2	—	2	—	—
Fore Chine Ribs	2	2	2	—	—	—	1	1	2	1	2	4	2	2	3
Brisket	3	3	2	1	1	8	7	5	7	—	3	5	8	2	2
Other Cuts	9	9	6	18	9	6	1	2	5	3	13	3	23	13	12

Since butchers were quoting prices for a week, it was necessary to discover whether or to what extent these were varied either because of difficulty in clearing stocks or because of shortages which might occur. Tables 23 and 24 indicate that relatively few butchers were at times unable to supply cuts for which they were asked, or had difficulty in disposing of the less popular cuts for the purposes and at the price they would normally be sold. If considered together with Tables 12 and 22, these results again suggest some lack of price competition since the majority of butchers appeared to have had little difficulty in equating supply with demand without recourse to price variation. Thus it could be argued that, as many customers tended to leave the choice of cut to their butchers, most problems of this kind could be overcome. At the same time Table 17 shows that well over half the butchers in each town regularly purchased some part of their supplies in wholesale cuts. Again, many of the retailers pointed out that their cold store facilities were such that they did not need to clear their stocks at particular times. It was also apparent that in many instances butchers would have regarded having to increase or reduce prices temporarily to equate their supplies with their demand as an indication of inefficient management of their businesses. Finally, no information was obtained on rents, capital costs of shop equipment, delivery practices or other indications of the cost of services in different shops. It is impossible, therefore, to be certain how much of the price variation was due to service competition. On balance at least, the data can not be interpreted as saying more than that many butchers compete with each other more by offering different types of service than on price.

SUMMARY AND CONCLUSIONS

SUMMARY :

1. This report is based on an interview survey of 446 specialist butchers' shops, co-operative meat departments and supermarkets in Birmingham, Glasgow, Liverpool, London and Newcastle upon Tyne.

2. The main objectives of the investigation were :

   (a) an appraisal of the importance of different criteria by which consumers judge the quality of beef.

   (b) some indication of types of beef sold in areas where consumer acceptance studies have since been undertaken.

   (c) general information on meat retailing, including consumer buying habits, pricing, cutting and procurement of supplies.

3. Leanness, tenderness and flavour were selected as criteria of quality for particular study, but butchers were not restricted to these for their opinions on consumer preference.

4. The vast majority of butchers in all income areas, as might be expected, were convinced that their customers wanted very tender and very lean beef. Twice as many thought that most of their customers liked full flavoured beef than those who believed a mild flavour was required, but a quarter voluntarily asserted that flavour was of no importance.

   Butchers considered that leanness was the characteristic of first importance in consumers' estimates of quality, tenderness second and flavour third. They almost disregarded marbling, ageing and other criteria in the list from which they chose. Nevertheless, 11% of the London butchers made flavour the first consideration, and in Glasgow, Liverpool and Newcastle about 17% thought that it was either the first or second criterion by which their customers judged quality. Moreover, Glasgow and Newcastle retailers said that about a quarter of their customers had required beef of good flavour. Again, when consumers' favourable comments on beef, subsequent to purchase were considered, flavour was mentioned by about 50% of the butchers, while leanness was quoted by only about 12%.

5. A wide variety of culinary uses for all or part of many primary cuts was noted. Thus, Topside was not uncommonly used either for roasts or frying steaks and Chuck might be used for frying as well as for stews or mince. Uses varied between butchers and between cities.

6. Few butchers believed that many of their customers knew the anatomical origin or the special characteristics of many of the varied cuts. Taking all cities together less than half the customers asked for particular cuts by name when buying roasts or frying steak and less than a third when purchasing beef for stews.

In four out of the five cities Topside or Silverside were given as the most popular roasts, Sirloin came next, and third choice was usually Fore Chine Ribs. For frying steaks the usual order of preference was Fillet, then Rump, followed by a variety of other cuts.

7. From a third to half the butchers stated that proportionately more of the carcase is now sold for frying than five years ago, and only slightly fewer held that the same was true for mince. They were less clear about the trend for roasts and stews.

8. A number of the specialist butchers interviewed displayed joints with weight and price labels. Nevertheless a large proportion of most retailers' customers left the choice of beef to the butcher.

9. For the vast majority of butchers there was no clear relationship between the degree of finish of carcases procured and their general belief that the consumer requires lean meat. Medium finished sides were as often bought as those described as of light finish.

10. Butchers' estimates of the most common weight of side purchased were clear; from 271 to 310 lbs.; but many were uncertain of the age of animal from which these were obtained.

11. A considerable proportion of supplies in Liverpool and London were obtained as wholesale cuts, and in other cities these amounted to about a quarter of total procurement. The hindquarter cuts most in demand were Tops and Rumps. Shins and Ribs were most often purchased among forequarter cuts.

12. Regional differences in cutting were less notable than expected. Nevertheless some variation in primary cutting and in presentation for the customer, as well as the culinary uses of different cuts were commonly found both between butchers and cities.

13. Prices of steaks, joints and stewing beef varied considerably between cities and between shops for similar cuts. In Liverpool all prices except for Brisket were lower than elsewhere. In London high quality frying steaks sold for more than in any other city and the highest prices for Sirloin and Fore Chine Ribs were found in Glasgow.

    In general prices in low income areas were below those in other districts, but the price differential between high and low quality cuts was virtually the same in both districts.

CONCLUSIONS :

1. It is impossible to question the importance of tenderness to consumers' estimates of quality. Butchers attach almost equal significance to leanness. Whether in fact their customers do so is less certain. They appear to regard leanness as very important when they buy, but less so on eating. Consumers can, of course, make certain of buying lean beef, and therefore might not consider this characteristic later. Nevertheless, evidence from consumer tests in the same cities suggests that, on eating, steaks with a considerable amount of fat are acceptable, if satisfactory in other respects.

2. Flavour may not be much less important than leanness in many consumer estimates of quality. Certainly it cannot be left out of account in any attempts to define quality likely to be acceptable to the mass market.

3. Tenderness, leanness and flavour are almost certainly the three most important criteria by which consumers judge the quality of beef. They are not much concerned with other attributes, though some which they disregard such as marbling and hanging may well contribute to their overall appreciation of beef. It was not possible to draw firm conclusions about colour, but there is informal evidence to suggest that this is an important characteristic at time of purchase.

4. Because many consumers are unaware of the attributes of particular cuts it may be realistic to sell beef as first, second or third quality and according to its culinary use, rather than under traditional names.

5. Though the trend to increased demand for frying steaks and stewing beef was confirmed, this was not marked.

6. That butchers' procurement of carcases of different degrees of finish did not agree with their views on consumer requirements for lean beef, further suggests that leanness is less important to consumers than most butchers believed. Alternatively this could be due to lower prices for over fat carcases, a connection between conformation and fatness, better eating quality from medium as opposed to lightly finished sides, or a failure of the market to make its requirements known to producers. This offers an obvious and important field for further research.

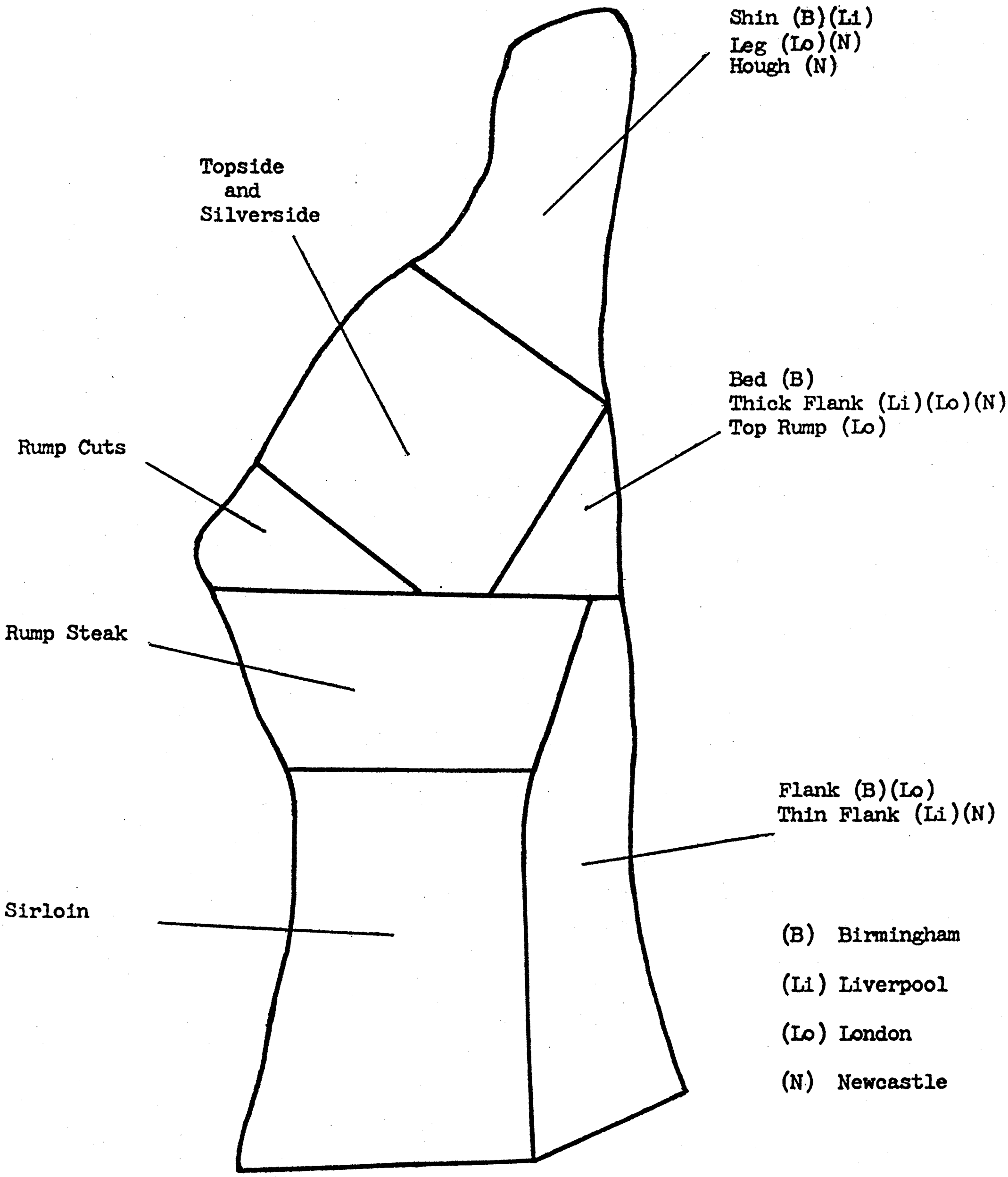
7. The fact that many butchers were not fully aware of and tended to underestimate the age of animal from which carcases were obtained is an example of imperfect spread of knowledge between producer and retailer. Butchers' requirements in this respect, therefore, can only be indirectly transmitted to producers.

8. The widespread procurement of at least part of supplies in wholesale cuts shows that the wholesale trade offers a considerable service, enabling the retailer to make flexible purchases. This must contribute to efficiency in the meat market.

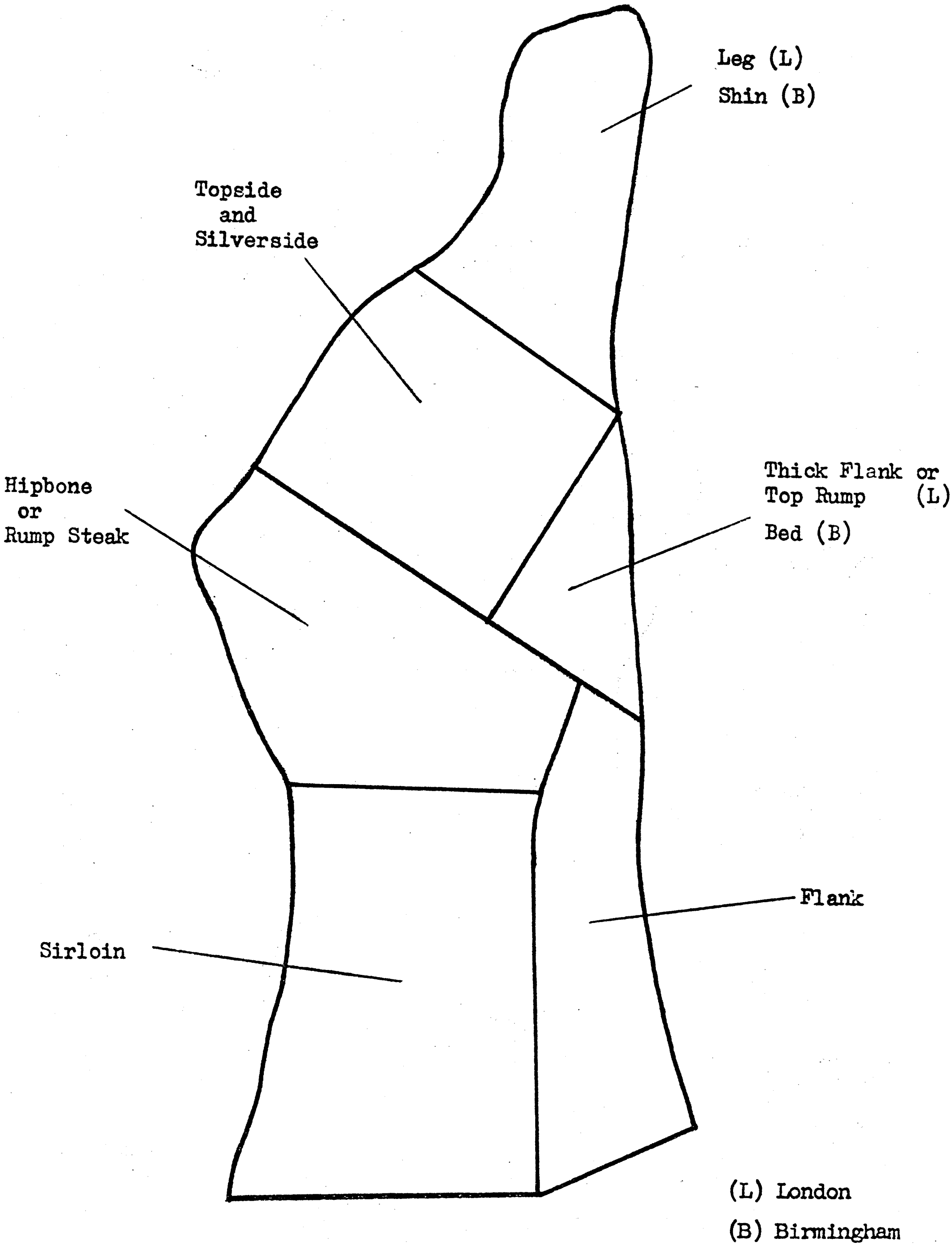
9. Differences between cities in cutting practices and the culinary uses for which different cuts were sold appeared to be well adapted to meeting regional differences in demand for roasts, steaks and stews. Some inter-city price differences for particular cuts also reflected variations in local demand.

10. Since many butchers easily equated supply of different cuts with demand, without varying their prices, and because individual prices for the same joints varied considerably, it is argued that they may have competed as much by service as on price.

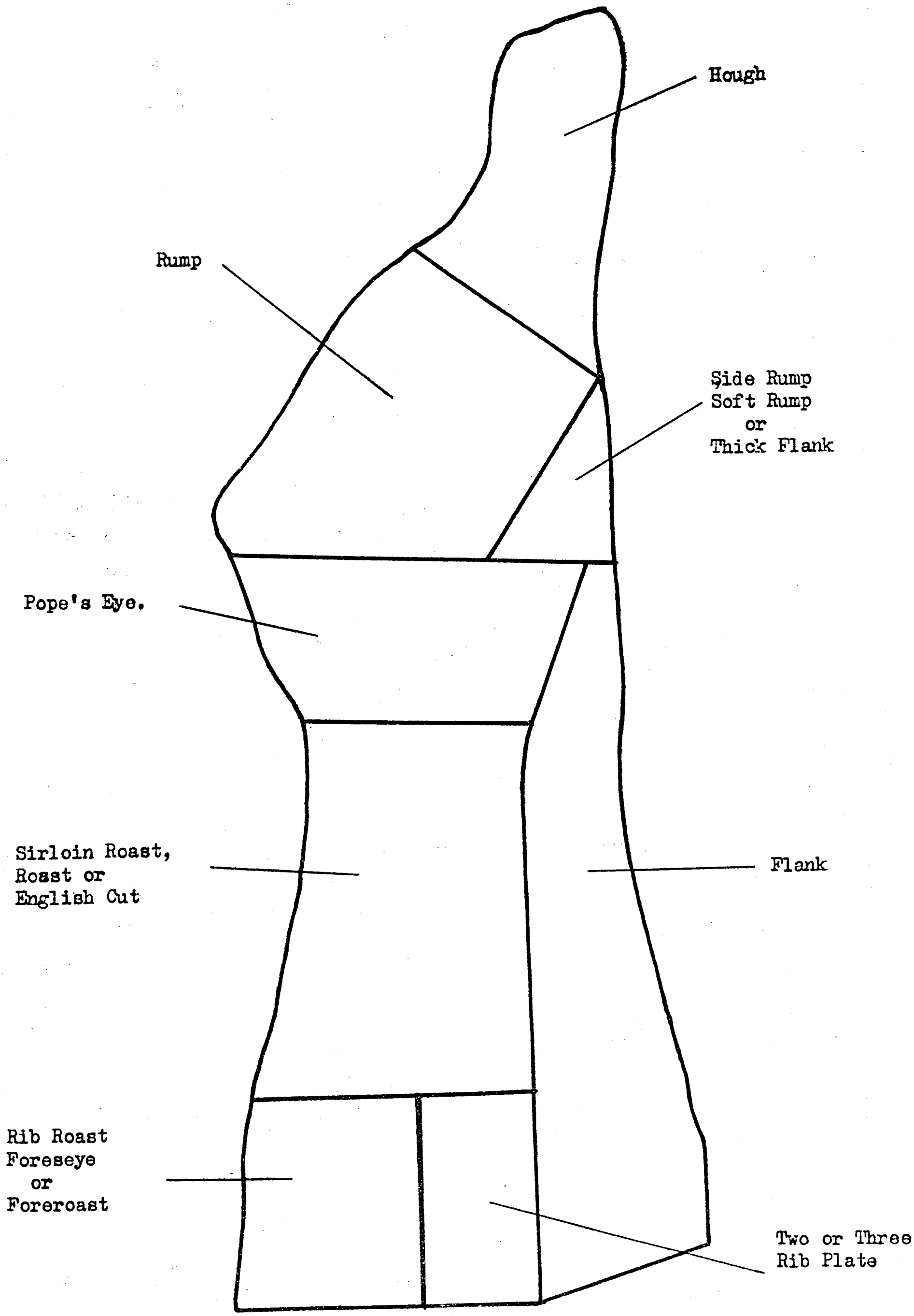
APPENDIX I



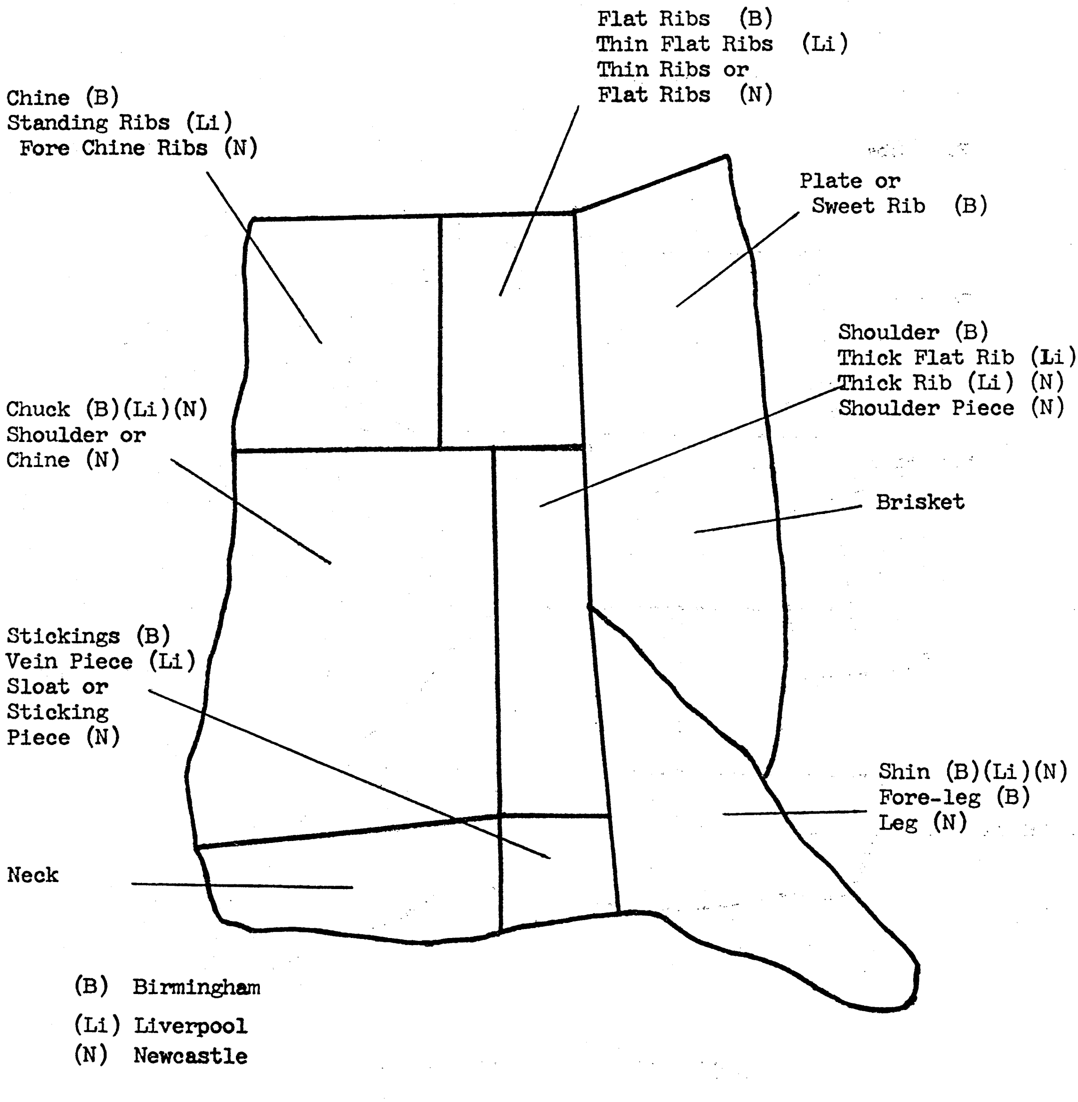
BIRMINGHAM, LIVERPOOL, LONDON AND NEWCASTLE—HINDQUARTER CUTS



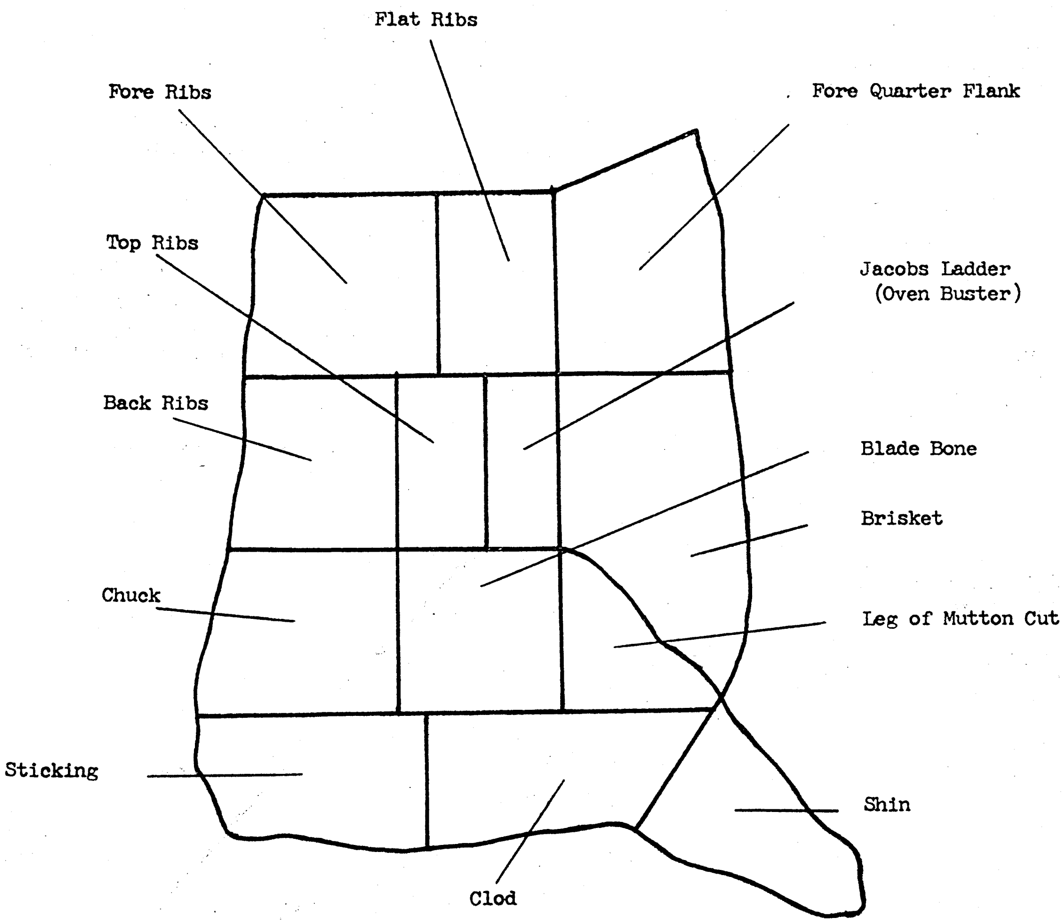
LONDON AND BIRMINGHAM—ALTERNATIVE HINDQUARTER CUTS



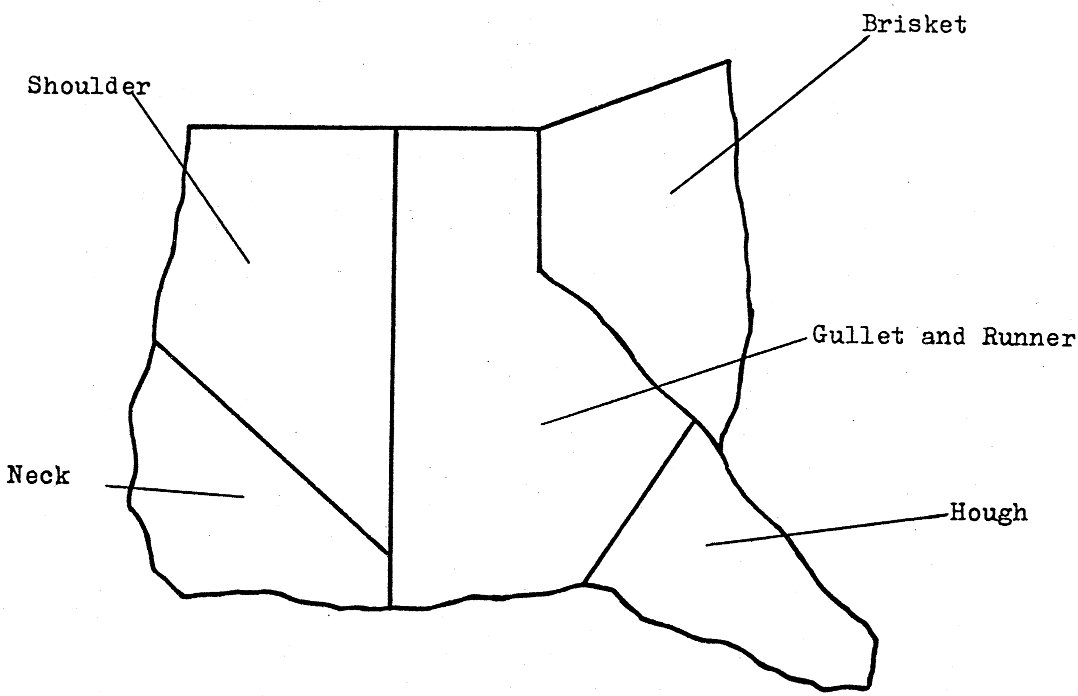
GLASGOW—HINDQUARTER CUTS



BIRMINGHAM, LIVERPOOL, NEWCASTLE—FORECUTS



LONDON—FOREQUARTER CUTS



GLASGOW—"FORE-LEG" CUTS

Appendix II Retail Prices, November, 1963

BIRMINGHAM

Name of Cut	Low Income Areas							High, Medium & Mixed Income Areas							Total of All Areas						
	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butcher Stating Prices
	s.	d.	s.	d.	s.	d.		s.	d.	s.	d.	s.	d.		s.	d.	s.	d.	s.	d.	
Shin (hind leg)	3	2	3	5	2	11	17	3	4	3	6	3	1	38	3	3	3	6	3	0	55
Topside	5	1	5	8	4	7	22	5	4	5	10	4	10	43	5	4	5	9	4	9	65
Silverside	5	2	5	8	4	6	21	5	4	5	10	4	11	42	5	4	5	9	4	9	63
Rump Cuts BO	4	7	5	6	3	7	13	4	11	5	6	4	5	23	4	10	5	6	4	1	36
Bed	5	3	5	8	4	7	10	5	2	5	8	4	4	12	5	3	4	8	4	4	22
Fillet	7	6	8	5	6	7	20	7	7	8	7	6	9	39	7	6	8	6	6	7	59
Rump or Hip Bone Steak	6	6	6	11	6	0	23	6	7	7	3	5	7	42	6	7	7	2	5	10	65
Sirloin BI	4	7	5	0	4	0	5	4	2	4	6	3	9	14	4	3	4	8	3	9	19
Sirloin BO	5	4	5	7	5	0	18	5	7	5	11	5	2	37	5	6	5	11	5	1	55
Chine BI	3	0	3	10	3	2	9	3	7	4	0	3	4	29	3	7	3	11	3	3	48
Chine BO	4	10	5	4	4	6	4	4	6	5	1	3	9	18	4	7	5	2	3	9	22
Flat Ribs BI	2	1	2	10	1	4	9	2	1	2	7	1	9	26	2	1	2	7	1	8	35
Flat Ribs BO	3	2	3	4	3	0	6	3	3	3	6	3	0	7	3	3	3	5	3	0	13
Plate/Sweet Rib BI	1	10	2	0	1	10	4	1	11	2	3	1	10	8	1	11	2	2	1	10	12
Chuck	4	2	4	6	3	8	21	4	4	4	8	3	11	42	4	3	4	8	3	10	63
Shoulder	4	4	4	11	3	10	12	4	5	4	10	4	0	27	4	5	4	11	3	11	39
Brisket BI	1	10	2	2	1	8	14	1	10	2	2	1	7	32	1	10	2	2	1	7	46
Brisket BO	3	1	3	4	2	8	8	3	4	3	6	3	3	13	3	3	3	6	2	10	21
Neck	3	1	3	5	2	11	10	3	4	3	6	3	0	18	3	3	3	6	3	0	28
Sticking	3	1	3	5	2	10	19	3	3	3	6	2	11	38	3	2	3	6	2	10	57
Shin (fore leg)	3	2	3	5	2	11	14	3	4	3	6	3	0	38	3	3	3	6	3	0	52
Flank BI	1	8	2	0	1	2	5	1	7	1	11	1	4	12	1	7	2	0	1	4	17

BO—Bone out

BI—Bone in

APPENDIX II Retail Prices, November, 1963

GLASGOW

NAME OF CUT	LOW INCOME AREAS							HIGH, MEDIUM & MIXED INCOME AREAS							TOTAL OF ALL AREAS						
	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices
	s.	d.	s.	d.	s.	d.		s.	d.	s.	d.	s.	d.		s.	d.	s.	d.	s.	d.	
Hough (hind leg)	3	5	3	7	3	3	11	3	6	3	10	3	1	20	3	5	3	9	3	2	31
Rump	4	11	5	4	4	6	24	5	1	5	10	4	7	48	5	0	5	9	4	6	72
Fillet	7	4	8	1	6	5	21	7	9	8	9	6	8	41	7	7	8	6	6	7	62
Pope's Eye	6	0	6	10	5	4	22	6	5	7	4	5	5	43	6	4	7	3	5	4	65
Sirloin BI	4	6	5	6	4	0	8	5	0	5	7	4	4	13	4	10	6	6	4	0	21
Sirloin BO	5	9	6	7	5	0	21	5	10	6	9	4	10	42	5	10	6	7	4	11	63
Thin Flank BI	1	11	2	0	1	10	11	2	0	2	2	1	9	36	2	0	2	2	1	9	47
Rib Roast BO	5	6	6	4	4	9	18	5	7	6	6	4	7	23	5	6	6	6	4	7	41
Shoulder	4	1	4	7	3	6	34	4	5	4	8	3	9	42	4	2	4	8	3	9	76
Gullet or Runner	3	7	4	0	3	3	8	3	8	4	8	2	8	15	3	8	4	3	2	10	23
Brisket BO	3	11	4	7	3	4	23	4	4	4	11	3	9	40	4	2	4	10	3	6	63
Hough (fore leg)	3	3	3	8	2	7	11	3	4	3	10	2	11	20	3	4	3	9	2	10	31

BO—Bone out

BI—Bone in

APPENDIX II **Retail Prices, November, 1963**

LIVERPOOL

Name of Cut	Low Income Areas							High, Medium & Mixed Income Areas							Total of All Areas						
	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices
	s.	d.	s.	d.	s.	d.		s.	d.	s.	d.	s.	d.		s.	d.	s.	d.	s.	d.	
Shin (hind leg)	3	0	3	6	2	6	18	3	2	3	5	2	11	32	3	1	3	5	2	8	50
Topside	4	5	4	10	4	0	30	4	9	5	4	4	2	39	4	7	5	2	4	1	69
Silverside	4	5	4	10	3	11	30	4	9	5	4	4	3	39	4	7	5	2	4	0	69
Rump & Shells BO	4	5	5	1	3	10	21	4	11	5	8	4	5	28	4	9	5	6	4	1	49
Thick Flank	4	4	5	0	3	9	7	4	0	4	10	3	3	8	4	2	4	11	3	4	15
Fillet Steak	6	4	7	1	5	6	31	7	2	8	2	6	2	39	6	7	7	11	5	9	70
Rump Steak	5	4	6	0	4	6	29	6	0	6	10	5	1	39	5	8	6	7	4	9	68
Sirloin BO	4	5	5	0	3	9	30	4	9	5	5	4	0	38	4	7	5	4	3	10	68
Standing or Fore Chine Ribs BI	3	1	3	9	2	5	9	3	6	4	6	2	8	9	3	3	4	2	2	6	18
Fore Chine Ribs BO	3	11	4	9	3	6	8	4	2	5	1	3	5	9	4	0	4	10	3	6	17
Chuck	3	7	4	0	3	4	26	3	9	4	3	3	2	38	3	8	4	2	3	2	64
Brisket BI	2	0	2	11	1	6	26	2	4	3	4	1	9	38	2	2	3	3	1	7	64
Neck	3	0	3	6	2	6	18	3	2	3	5	2	11	32	3	1	3	5	2	8	50
Vein Piece	3	0	3	6	2	6	18	3	2	3	5	2	11	32	3	1	3	5	2	8	50
Shin (fore leg)	3	0	3	6	2	6	18	3	2	3	5	2	11	32	3	1	3	5	2	8	50

BO—Bone out
BI—Bone in

APPENDIX II **Retail Prices, November, 1963**

LONDON

Name of Cut	Low Income Areas							High, Medium & Mixed Income Areas							Total of All Areas						
	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices
	s.	d.	s.	d.	s.	d.		s.	d.	s.	d.	s.	d.		s.	d.	s.	d.	s.	d.	
Leg	3	3	3	6	2	10	18	3	4	3	9	2	11	53	3	3	3	8	2	11	71
Topside	4	10	5	5	4	5	20	5	2	5	10	4	7	66	5	1	5	8	4	5	86
Silverside	4	6	5	1	3	10	20	4	10	5	6	4	3	63	4	9	5	5	4	2	83
Thick Flank	4	8	5	5	4	4	14	5	2	6	0	4	5	41	5	0	5	10	4	4	55
Rump Cuts BI	2	0	2	6	1	6	6	3	3	4	10	1	10	21	2	11	4	9	1	10	27
Rump Cuts BO	4	8	5	2	4	0	6	5	9	7	1	5	0	13	5	2	6	10	4	4	19
Fillet	8	1	9	2	7	0	14	9	0	11	6	7	10	60	8	10	10	9	7	8	74
Rump and Hip Bone Steak	7	1	8	3	6	1	18	7	9	8	11	6	6	64	7	5	8	8	6	4	82
Sirloin BI	4	1	4	6	3	6	5	4	9	5	7	3	11	36	4	7	5	6	3	10	41
Sirloin BO	5	4	6	0	4	9	18	5	9	6	7	5	2	47	5	7	6	5	4	11	65
Thin Flank BI	1	5	1	11	1	0	14	1	9	2	5	1	2	34	1	8	2	4	1	1	48
Fore Rib BI	3	3	3	9	2	10	17	3	4	3	10	2	9	48	3	4	3	10	2	9	65
Fore Rib BO								4	9	5	9	4	2	13	4	9	5	9	4	2	13
F.Q. Flank, Plate	2	0	3	3	1	5	9	1	9	2	4	1	2	25	1	10	2	7	1	3	34
Back Rib BI	3	5	4	2	2	10	13	3	10	4	6	3	3	30	3	7	4	5	3	1	43
Top Rib BI	2	10	3	10	1	4	6	3	5	3	10	3	0	18	3	3	3	10	2	8	24
Top Rib BO	3	4	3	7	3	1	10	3	10	4	6	3	4	12	3	7	4	3	3	2	22
Brisket BI	1	10	2	3	1	7	12	2	1	2	6	1	7	45	2	0	2	6	1	7	57
Brisket BO	3	0	3	6	2	10	5	2	11	3	9	2	0	14	2	11	3	8	2	0	19
Chuck	4	0	4	5	3	7	16	4	1	4	8	3	7	61	4	1	4	7	3	7	77
Blade	4	1	4	7	3	7	13	4	2	4	8	3	9	41	4	2	4	8	3	8	54
Leg of Mutton	4	1	4	8	3	0	7	4	2	4	10	3	5	28	4	2	4	9	3	5	35
Sticking	3	4	3	8	2	11	7	3	5	3	11	2	11	42	3	5	3	10	2	11	59
Clod	3	3	3	8	2	10	18	3	5	3	11	2	11	45	3	5	3	10	2	11	63
Shin (fore leg)	3	0	3	4	2	10	17	3	3	3	8	2	11	46	3	2	3	7	2	10	63

BO—Bone out

BI—Bone in

APPENDIX II **Retail Prices, November, 1963**

NEWCASTLE UPON TYNE

Name of Cut	Low Income Areas									High, Medium & Mixed Income Areas								Total of All Areas						
	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices	Average Price		Average of Twenty-five per cent: Most Expensive		Average of Twenty-five per cent: Least Expensive		No. of Butchers Stating Prices
	s.	d.	s.	d.	s.	d.		s.	d.	s.	d.	s.	d.		s.	d.	s.	d.	s.	d.	
Hind Leg	3	6	3	11	3	3	16	3	7	3	8	3	5	11	3	6	3	10	3	3	27
Topside	5	1	5	5	4	10	25	5	0	5	3	4	7	43	5	0	5	4	4	8	68
Silverside	5	1	5	5	4	10	25	5	0	5	3	4	7	42	5	0	5	4	4	8	67
Rump Cuts BO	5	1	5	7	4	7	25	4	9	5	5	4	4	30	5	0	5	6	4	6	55
Thick Flank	5	6	6	0	5	0	6	5	6	6	0	4	8	6	5	6	6	0	4	11	12
Fillet	6	11	7	7	6	1	25	7	2	8	1	6	4	38	7	0	8	1	6	1	63
Rump Steak	5	10	6	3	5	5	25	5	9	6	5	4	11	41	5	9	6	4	5	2	66
Sirloin BI								4	4	4	11	3	9	17	4	4	4	11	3	9	17
Sirloin BO	5	0	5	4	4	8	25	4	10	5	4	4	1	36	4	11	5	4	4	2	61
Fore Chine Ribs BI	3	8	4	8	2	11	24	3	7	4	2	3	0	34	3	8	4	4	3	0	58
Fore Chine Ribs BO	4	2	5	6	3	4	5	4	1	4	9	3	7	9	4	1	5	0	3	5	14
Chuck	3	10	4	1	3	6	36	3	9	4	0	3	4	52	3	10	4	0	3	4	88
Brisket BO	3	3	3	11	2	10	24	3	4	3	10	2	9	41	3	4	3	11	2	9	65
Neck	3	6	3	11	3	3	16	3	7	3	8	3	5	11	3	6	3	10	3	3	27
Sloat or Sticking	3	6	3	11	3	3	16	3	7	3	8	3	5	11	3	6	3	10	3	3	27
Shin (fore leg)	3	6	3	11	3	3	16	3	7	3	8	3	5	11	3	6	3	10	3	3	27

BO—Bone out

BI—Bone in

APPENDIX III **Numbers and Proportions of butchers selling selected pairs of cuts at varying price differentials**

Differential between prices	Topside and Rump Steak		Fillet and Rump Steak		Topside and Shin		Topside and Brisket (Bone out)	
BIRMINGHAM	No.	%	No.	%	No.	%	No.	%
0—6d.	9	17	16	31				
7d.—1/–	14	26	11	22				
1/1—1/6	17	32	16	31	5	10	1	5
1/7—2/–	12	23	4	8	22	42	6	29
2/1—2/6	1	2	3	6	20	38	12	57
2/7—3/–			1	2	5	10	2	9
3/1—3/6								
3/7—4/–								
4/1—4/6								
Total	53	100	51	100	52	100	21	100

Differential between Prices	Topside and Rump Steak		Fillet and Rump Steak		Topside and Shin		Topside and Brisket (Bone out)	
GLASGOW	No.	%	No.	%	No.	%	No.	%
0—6d.	8	13	11	18			9	15
7d.—1/–	25	40	17	29	2	7	33	56
1/1—1/6	22	36	14	23	10	33	15	25
1/7—2/–	5	8	12	20	9	30	2	4
2/1—2/6	2	3	5	8	5	17		
2/7—3/–					4	13		
3/1—3/6								
3/7—4/–			1	2				
4/1—4/6								
Total	62	100	60	100	30	100	59	100

Differential between prices	Topside and Rump Steak		Fillet and Rump Steak		Topside and Shin		Topside and Brisket (Bone in)	
LIVERPOOL	No.	%	No.	%	No.	%	No.	%
0—6d.	16	24	12	18			1	5
7d.—1/–	22	32	29	43	7	15	2	11
1/1—1/6	16	24	19	28	26	56	10	56
1/7—2/–	10	15	4	6	10	21	3	17
2/1—2/6	3	4	2	3	3	6	2	11
2/7—3/–	1	1	1	2	1	2		
3/1—3/6								
3/7—4/–								
4/1—4/6								
Total	68	100	67	100	47	100	18	100

APPENDIX III **Numbers and proportions of butchers selling selected pairs of cuts at varying price differentials**

Differential between prices	Topside and Rump Steak		Fillet and Rump Steak		Topside and Shin		Topside and Brisket (Bone out)	
LONDON	No.	%	No.	%	No.	%	No.	%
0—6d.	1	1	13	18	2	3		
7d.—1/–	2	2	29	40				
1/1—1/6	5	6	12	17	8	12		
1/7—2/–	18	22	12	16	31	48	13	76
2/1—2/6	15	19	3	4	21	33	2	12
2/7—3/–	28	35	1	1	1	2	1	6
3/1—3/6	9	11	2	3	1	2	1	6
3/7—4/–	3	4						
4/1—4/6			1	1				
Total	81	100	73	100	64	100	17	100

Differential between prices	Topside and Rump Steak		Fillet and Rump Steak		Topside and Shin		Topside and Brisket (Bone out)	
NEWCASTLE	No.	%	No.	%	No.	%	No.	%
0—6d.	24	36	10	16	1	4		
7d.—1/–	34	52	19	31			5	8
1/1—1/6	8	12	17	27	13	48	27	42
1/7—2/–			12	19	13	48	23	36
2/1—2/6			1	2			8	12
2/7—3/–			3	5			1	2
3/1—3/6								
3/7—4/–								
4/1—4/6								
Total	66	100	62	100	27	100	64	100

TOTAL SAMPLE

Differential between prices	Topside and Rump Steak		Fillet and Rump Steak		Topside and Shin		Topside and* Brisket (Bone out)	
	No.	%	No.	%	No.	%	No.	%
0—6d.	58	17	62	20	3	1	12	7
7d.—1/–	97	29	105	34	9	4	46	26
1/1—1/6	68	21	78	25	62	28	45	25
1/7—2/–	45	14	44	14	85	39	47	26
2/1—2/6	21	6	14	4	49	22	24	13
2/7—3/–	29	9	6	2	11	5	4	2
3/1—3/6	9	3	2	1	1	1	1	1
3/7—4/–	3	1						
4/1—4/6			1	—				
Total	330	100	312	100	220	100	179	100

*Excluding Liverpool

Printed by Smith & Son (Newcastle) Ltd., Clavering Place, Newcastle upon Tyne 1

The

Newcastle Meat Marketing

Research Programme

Some early results are now becoming available from the Newcastle meat marketing research, sponsored by F.M.C. (Meat) Limited and the Agricultural Market Development Executive Committee. One report, "Butchers and their Customers," has already been published by the Agricultural Marketing Department of the University of Newcastle upon Tyne. Others will follow as the work progresses. Since the full programme is expected to take five years to complete, these reports are necessarily interim in character, dealing with particular phases of the work, and their conclusions must be limited in scope or sometimes tentative. It will not be possible to form balanced judgments or make reliable suggestions about the working of the livestock and fresh meat industries until the whole programme of research is nearer completion. The following description, therefore, of the general plan, organisation and development of the work should help readers to view these interim reports in perspective as relating to constituent parts of a wide ranging overall research programme.

Background

Beneath all the argument and counter argument, largely unsubstantiated, which has been voiced in recent years about the sale off farms of animals for meat, their slaughter, and the distribution of meat to the consumer through wholesalers and retailers, there lie certain clearly perceptible developments and trends.

Consumer taste is known to be changing in favour of convenience foods and this may have its effect on consumption of meat, with more steaks, chops, stewing meat and mince required, and a reduced demand for the traditional roast.

Surpluses of many agricultural products have made the British farmer more aware than ever before of the need to compete both on price and quality with his neighbour and with overseas suppliers. His problem has been aggravated by the appearance of new intensive techniques of production from which he has to choose, alongside the many traditional methods which arise from different systems of feeding, and the use of different breeds.

With the application of modern management techniques, chains of supermarkets have become a prominent feature of our high streets. These firms, knowing that one of their attractions is that they offer one-stop shopping and realising that most menus are planned around meat, have begun to compete with the traditional butcher's shop. Since their origin is usually in the grocery trade and because their system of retailing requires that their customers can, by self selection, repeat purchases with which they have previously been satisfied, it follows that these firms would like to procure meat which varies in quality as little as possible from week to week. Again, because these businesses feature keen price competition, based on high levels of turnover, they must try to obtain their supplies not only of standard quality, but in regular and large amounts. Finally, the meat must be of a kind that will maintain an attractive appearance for as long as possible when prepacked. The supermarket example is the most striking for purposes of illustration, but similar developments are taking place in much of the specialised retail meat trade. Thus, many small butchers have been compelled to close their doors, window and counter displays of joints with weights and prices marked are more in evidence and sometimes the meat is prepacked.

Finally, if the changes in retailing continue and gain momentum they may have to be matched by some modifications in assembly of fat animals, slaughtering, wholesaling and processing, whether by increases in scale of operation, writing of contracts to ensure supplies, or development of prepacking plants.

Without attempting to be exhaustive, therefore, enough evidence has been cited to show that farmers and the meat trade are faced with considerable uncertainty about the future. It was to throw light on this rather than to examine the efficiency of meat marketing at the present time that this research programme was planned, with the intention of providing information of value at once to farmers, auctioneers, wholesalers, retailers and consumers.

Objectives

A short, though perhaps ambitious, definition of the objectives of the research would be to obtain information which might be useful in increasing the efficiency of meat marketing in the United Kingdom. If the intention is stated more clearly as an attempt to discover what type or types of meat would be most in demand by consumers in ten years' time, and how this demand might best be met by farmers and those engaged in processing and distribution, the possible field of investigation is still vast. Nevertheless, except that attention is being confined to beef, this is a good, broad description of the overall objectives of the research programme.

If, however, this description were interpreted exhaustively it would call for very wide ranging research into production of beef animals, their processing and distribution, together with consumer demand. Thus, it might be necessary to examine :

1. Changes in organisation and performance of wholesaling, processing and retailing.
2. Changes in consumer tastes, preferences and buying habits in relation to food in general and beef in particular.
3. Effects of these changes upon probable demand for various types of beef animals.
4. Developments in production of beef cattle and meat processing.
5. How far beef can be standardised in type and specified according to characteristics which can be commercially identified or measured.
6. The effects of probable production and demand on prices.

Very precise analysis of almost any of these problems would require detailed and time consuming research. The programme, therefore, has been planned and is being undertaken, as far as possible, in a way which allows attention to be concentrated on what appear to be the more important problems, while not excluding consideration of others. This means that the true objective of the work is not to write a blueprint for the meat industry, but to provide information which should aid policy and commercial decisions by anyone concerned with the production or marketing of beef.

The Research Programme

Active planning of the research started in the autumn of 1963 on the assumption that meat marketing had in the past been somewhat producer orientated. That is to say the trade, willingly or otherwise, accepted what the farmer produced and he, whether by accident or design, tended to produce with attention directed more to the economics of production than to what the market might require. At the same time it appeared that an increasing number of farmers were asking what types of beef were most in demand and failing to get helpful replies, while the trade with its eye on the mass market was equally concerned to identify the types of beef which consumers most required. Therefore, though a final answer could hardly be obtained to the problem of what kinds of beef the changing meat trade is demanding, without taking production considerations into account, first priority was given to making some assessment of consumer acceptance for different types of beef. Preliminary consultation with the trade showed that it was not possible to identify and limit to three or four main types the varieties of beef carcase which at the same time were both in good supply and considered to be generally acceptable to consumers. This meant that assessment of relative acceptability of different types of beef became a far more complex problem than might have been expected. Much of the research so far, therefore, has been directed to resolving this, and the necessary investigational work is now complete. This has been centred in Birmingham, Glasgow, Liverpool, London and Newcastle upon Tyne in order to cover as much of the country as possible, while at the same time directing attention to areas where there are high concentrations of population and in which change may be expected first to occur.

At the outset, a survey of some 400 butchers was undertaken in order to obtain indications of those characteristics of beef by which consumers were believed to judge quality. The results of this study have been published in the first interim research report, "Butchers and their Customers," and show that, on eating, three broad characteristics, leanness, tenderness and flavour are of overwhelming importance. These, therefore, are the criteria which have been studied individually in consumer tests in the five cities, the results of which will be published as soon as analysis is complete. Leanness and tenderness can be objectively measured, and tests have been carried out to find how lean and how tender consumers like their beef. Flavour has also been examined, but a refined assessment is not possible on the same basis. With this information, it should be possible to define fairly accurately the type of beef most acceptable to the mass market.

The next step, therefore, will be to consider the range of carcases from which such beef can be obtained, to describe these in terms of visible or measurable characteristics and to identify different methods by which they can be produced on the farm. At the same time, since acceptability must be affected by price, it will be necessary to obtain and examine a considerable mass of data on costs of production, killing out percentages, and retail yield of saleable meat. To this end, already three groups of cattle have been produced in different ways to be ready for slaughter at about the same time, and details of their management recorded. These and other carcases of known history will be measured and weighed at each stage from slaughter to retail and the meat examined by an expert tasting panel. Thus, acceptability is being examined both from the consumption and the production standpoint.

Concurrently a start has been made with the examination of changes in the process of assembly and distribution. Studies have been made of the existing arrangements with regard to fatstock auctions, slaughtering and wholesaling. These will be developed to examine change, either on a comparative basis, as for example a retailing study between an area where supermarket trading has developed extensively and one where traditional specialist butchers' shops predominate, or by case studies such as might be undertaken for a particular wholesale market or firm.

The field of work offered by this research project is very wide. Although it will not be possible to pursue all the worthwhile lines of enquiry which present themselves there are several relevant matters which urgently demand consideration. Among these one of the most important is price and the extent to which it fulfils its short and long term functions. Pre-eminently these functions are to equalise supply and demand of different types of beef and of various cuts of beef in relation to each other and meat in general.